

MAINTAIN PROGRAM PLAN MATRIX

Scenario	Search page	Student Program tab	Student Plan tab	Student SubPlan tab
Add Plan under different Program	Add a new value tab Career = <i>select career</i> StdCarNbr = <i>next available</i> Click Add	Eff Date = <i>standard</i> Program Action = ACTV Program = <i>Select program</i> Admit Term = <i>matches Eff Date</i> Req Term = <i>defaults to Admit Term</i>	Plan = <i>Select plan</i> Plan Sequence = <i>number</i> Declare Date = <i>matches Eff Date</i> Req Term = <i>Catalog Year</i>	Optional: Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>matches Eff Date</i> Req Term: <i>Catalog Year</i>
Add Plan under same Program	Find an Existing value tab Select Program	Add new row (+) Eff Date = <i>standard</i> Program Action = PLNC Action Reason = RQST Program = no change Admit Term = no change Req Term = no change	Add new row (+) Plan = <i>Select plan</i> Plan Sequence = <i>increment number</i> Declare Date = <i>matches Eff Date</i> Req Term = <i>Catalog Year</i>	Optional: Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>matches Eff Date</i> Req Term: <i>Catalog Year</i>
Add a Sub-Plan	Find an Existing value tab Select Program	Add new row (+) Eff Date = <i>standard</i> Program Action = PLNC Action Reason = SUBP Program = no change Admit Term = no change Req Term = no change	No changes	Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>standard (for term that student is entering SubPlan)</i> Req Term: <i>Catalog Year (match Plan)</i>
Change a Sub-Plan	Find an Existing value tab Select Program	Add new row (+) Eff Date = <i>standard</i> Program Action = PLNC Action Reason = SUBP Program = no change Admit Term = no change Req Term = no change	No changes	Sub-Plan = <i>change to new Sub-Plan</i> Declare Date = <i>standard (for term that student is entering SubPlan)</i> Req Term: <i>Catalog Year (match Plan)</i>
Drop a Sub-Plan	Find an Existing value tab Select Program	Add new row (+) Eff Date = <i>standard</i> Program Action = PLNC Action Reason = SUBP Program = no change Admit Term = no change Req Term = no change	No changes	Find Sub-Plan to drop Delete row (-)

Scenario	Search page	Student Program tab	Student Plan tab	Student SubPlan tab
Replace Plan with new Plan under different Program	Find an Existing value tab Select Program to be replaced	Add new row (+) Eff Date = <i>standard</i> Program Action = PRGC Action Reason = RQST Program = <i>change to new program</i> Admit Term = <i>matches Eff Date</i> Req Term = <i>defaults to Admit Term</i>	Plan = <i>Select new plan</i> Plan Sequence = <i>number</i> Declare Date = <i>matches Eff Date</i> Req Term = <i>Catalog Year</i>	Optional: Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>matches Eff Date</i> Req Term: <i>Catalog Year</i>
Replace Plan with new Plan under same Program	Find an Existing value tab Select Program	Add new row (+) Eff Date = <i>standard</i> Program Action = PLNC Action Reason = RQST Program = <i>no change</i> Admit Term = <i>no change</i> Req Term = <i>no change</i>	Plan = <i>change to new plan</i> Plan Sequence = <i>number</i> Declare Date = <i>matches Eff Date</i> Req Term = <i>Catalog Year</i>	Optional: Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>matches Eff Date</i> Req Term: <i>Catalog Year</i>
Drop a Plan when others remain under Program	Find an Existing value tab Select Program	Add new row (+) Eff Date = <i>standard</i> Program Action = PLNC Action Reason = RQST Program = <i>no change</i> Admit Term = <i>no change</i> Req Term = <i>no change</i>	Find Plan to drop Delete row (-)	
Discontinue Program when others exist	Find an Existing value tab Select Program to be dropped	Add new row (+) Eff Date = <i>standard</i> *** Program Action = DISC Note: ignore warning regarding student enrollment Action Reason = RQST Program = <i>no change</i> Admit Term = <i>no change</i> Req Term = <i>no change</i>	No changes	No changes
Add Plan in Same Program after Degree Completion	Add a new value tab Career = <i>select career</i> StdCarNbr = <i>next available</i> Click Add	Eff Date = <i>standard</i> Program Action = ACTV Program = <i>Select program</i> Admit Term = <i>matches Eff Date</i> Req Term = <i>defaults to Admit Term</i>	Plan = <i>Select plan</i> Plan Sequence = <i>number</i> Declare Date = <i>matches Eff Date</i> Req Term = <i>Catalog Year</i>	Optional: Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>matches Eff Date</i> Req Term: <i>Catalog Year</i>

Scenario	Search page	Student Program tab	Student Plan tab	Student SubPlan tab
Change data about existing Program or Plan	Find an Existing value tab Select Program	Add new row (+) Eff Date = <i>standard</i> Program Action = DATA Action Reason = <i>select reason</i> Program = no change Admit Term = no change Req Term = no change	Change Plan Sequence, if needed Change Declare Date, if needed Change Req Term, if needed	Change Declare Date, if needed Change Req Term, if needed
Add a Career	Add a new value tab Career = <i>new career</i> StdCarNbr = 0 Click Add	Eff Date = <i>standard</i> Program Action = ACTV Program = <i>Select program</i> Admit Term = <i>matches Eff Date</i> Req Term = <i>defaults to Admit Term</i>	Plan = <i>Select plan</i> Plan Sequence = <i>number</i> Declare Date = <i>matches Eff Date</i> Req Term = <i>Catalog Year</i>	Optional: Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>matches Eff Date</i> Req Term: <i>Catalog Year</i>
Change Degree	Find an Existing value tab Select Program	Add new row (+) Eff Date = <i>standard</i> Program Action = PLNC Action Reason = RQST Program = no change Admit Term = no change Req Term = no change	Plan = <i>change to new plan w/ degree</i> Plan Sequence = <i>number</i> Declare Date = <i>matches Eff Date</i> Req Term = <i>Catalog Year</i>	Optional: Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>matches Eff Date</i> Req Term: <i>Catalog Year</i>
Change PRIMARY program	Find an Existing value tab Select ACTIVE program with LOWEST StdCareerNbr <i>Note details of OLD row</i>	Add new row (+) Eff Date = <i>standard</i> Program Action = PRGC Action Reason = RQST Program = <i>change to primary program</i> Admit Term = <i>matches Eff date</i> Req Term = <i>defaults to Admit Term</i>	Plan = <i>Select primary plan</i> Plan Sequence = 10 Declare Date = <i>matches Eff Date</i> Req Term = <i>Catalog Year</i>	Optional: Sub-Plan = <i>Select Sub-Plan</i> Declare Date = <i>matches Eff Date</i> Req Term: <i>Catalog Year</i>
	Step 2: Choose one of the following			
	a) If end result is MORE programs:	then re-add OLD primary if student remains in program		
	Add a new value Career = <i>select career</i> StdCarNbr = <i>next available</i> Click Add	Eff Date = <i>standard</i> Program Action = ACTV Program = <i>Select OLD program</i> Admit Term = <i>term of OLD row</i> Req Term = defaults to Admit Term	Plan = <i>Select OLD plan</i> Plan Sequence = number (20, 30 etc) Declare Date = <i>that of OLD row</i> Req Term = <i>that of OLD row</i>	Optional: Sub-Plan = <i>that of OLD row</i> Declare Date = <i>that of OLD row</i> Req Term: <i>that of OLD row</i>
	b) If end result is EQUAL number of programs:	then PRGC next Std Career Nbr to OLD primary if student remains in that program		
	Select next StdCareerNbr	Add new row (+) Eff Date = <i>standard</i> Program Action = PRGC Action Reason = RQST Program = <i>select OLD program</i> Admit Term = <i>term of OLD row</i> Req Term = <i>defaults to Admit Term</i>	Plan = <i>Select OLD plan</i> Plan Sequence = 20, 30, etc Declare Date = <i>that of OLD row</i> Req Term = <i>that of OLD row</i>	Optional: Sub-Plan = <i>Select OLD Sub-Plan</i> Declare Date = <i>that of OLD row</i> Req Term: <i>that of OLD row</i>

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c) If end result is LESS programs: then DISC next Std Career Nbr

Select next StdCareerNbr

Add new row (+)

No changes

No changes

Eff Date = standard***

Program Action = DISC

Note: ignore warning regarding student enrollment

Action Reason = RQST

Program = no change

***if discontinue DURING a term: use standard date for CURRENT term

Admit Term = no change

***if discontinue BETWEEN terms; use standard date for NEXT term

Req Term = no change

Notes:

Eff Date = 1/1/YYYY for Spr

***enter date to designate the term in which the change is effective for

= 5/1/YYYY for Sum

= 8/1/YYYY for Fall

Plan Requirement Term = Catalog Year or matches Effective Date; WARNING: defaults to term which is not usually desired; double check this before saving

Effective Sequence = increment if more than one row will exist for an Effective Date

Plan Sequence = 10 should be assigned to PRIMARY Plan only; other plans should be assigned 20, 30, etc.