



## Business Process Guide

### Viewing a Student's Plan and Sub-Plan

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Author	Melissa K. Whatley
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## Process Overview

A student's **plan** refers to the **major, minor, or concentration**. The **sub-plan** refers to an **emphasis associated with a student's major**. Credential programs "hang" off of a student's plan. University Extended Education certificates are viewed as plans as well but the plan is appended to the student's record only after the certificate has been awarded. A student must always have a plan declared. The default plan is "undeclared".

The sub-plan is attached directly to the plan, with which it belongs, meaning you cannot have a sub-plan (emphasis) without the plan (major).

Most of the student data needed will be displayed on this page. You will see the following data:

- Student Name
- Campus Wide ID
- Admit Term
- Expected Grad Term (anticipated)
- Degree Checkout Status
- Status with the University
- All Majors
- Minors
- Concentrations
- Emphasis

## Where the Data for This Process Comes From

A student's plan initially comes from the admissions application completed by the student via CSU Mentor. A student may request a change of plan once during the admissions process by contacting the CSUF Admissions area.

Once a student has been admitted, all plan changes must be requested in writing on the Change of Program form. The student must complete the form showing the old plan and the new requested plan. The form requires an approval signature from the academic department of the old plan as well as an approval signature from the academic department of the new plan. This form must be submitted to the Admissions and Records Service Center for processing.

## Where the Data from This Process Goes

The student's plan(s) are listed on the student's university transcript as well as numerous documents maintained by the university. Requests for various ad hoc reports will frequently ask for plan data to be included or may be a primary selection criterion for the production of a specific report. The plan is utilized to determine the appropriate course of study for the student to follow and is utilized to determine necessary degree requirements for the student to complete in order to be awarded a degree, major, minor, emphasis or certificate. Registration for specific courses may be restricted to students who have specific plans or sub-plans.



## Related Information

### Prerequisites and Assumptions

A student's plan of study is associated with his/her Academic Program. A specific plan must be applicable to the student's Program in order for the plan to be designated on the student's record. Subsequent changes of plan may only be processed if appropriate to the student's Program. Sub-plans (e.g. emphasis) are related to specific plans and cannot be declared if the student is not already approved for the related plan.

PREREQUISITES AND ASSUMPTIONS	
PREREQUISITE/ASSUMPTION	DETAIL
Academic Program determines eligibility for plan.	A student may only be placed in a degree seeking plan of study if the student is in the process of admission to the university or has been admitted. A student who is not admitted, may not pursue a degree related plan of study.
Sub-plans are linked to specific plans.	Sub-plans are related to specific plans. A student may not declare a sub-plan without previous approval of the related plan.
Credentials are built off of specific plans	The credential subpage "hangs" off of a plan.

### Key Definitions

Include important definitions of business or technical terms, including acronyms which may be unfamiliar to the intended audience of this document.

KEY DEFINITIONS	
TERM / ACRONYM	DEFINITION
Plan	Plans refer to a designated plan of study such as major, minor or concentration.
Sub-plan	Sub-plan refers to an emphasis within a major plan of study.
Credential	The educational credential subpage "hangs" off of a plan page.



## 1.0 Viewing a Student's Plan & Sub-Plan

Navigation: Home > Records & Enrollment > Career and Program Information > Student's Program/Plan

View Academic Plans - Find existing value

### Student Program/Plan

Enter any information you have and click Search. Leave fields blank for a list of all values.

ID:    
 Academic Career:    
 Student Career Nbr:    
 Campus ID:    
 National ID:    
 Last Name:    
 First Name:    
 Include History
  Correct History
  Case Sensitive

[Basic Search](#)

### Search Results

View All First 1-3

ID	Academic Career	Student Career Nbr	Program Short Descr	Institution Short Descr	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name
<a href="#">802001180</a>	<a href="#">Undergrad 2</a>	<a href="#">2</a>	<a href="#">Undergrad</a>	<a href="#">SUFL</a>	<a href="#">Humphreys,Bonnie Lynn</a>	<a href="#">Female</a>	<a href="#">09/26</a>	<a href="#">(blank)</a>	<a href="#">*****1675</a>	<a href="#">USA</a>	<a href="#">SSN</a>	<a href="#">HUMPHREYS</a>
<a href="#">802001180</a>	<a href="#">Undergrad 1</a>	<a href="#">1</a>	<a href="#">UG Trans</a>	<a href="#">CSUFL</a>	<a href="#">Humphreys,Bonnie Lynn</a>	<a href="#">Female</a>	<a href="#">09/26</a>	<a href="#">(blank)</a>	<a href="#">*****1675</a>	<a href="#">USA</a>	<a href="#">SSN</a>	<a href="#">HUMPHREYS</a>
<a href="#">802001180</a>	<a href="#">Undergrad 0</a>	<a href="#">0</a>	<a href="#">Undergrad</a>	<a href="#">CSUFL</a>	<a href="#">Humphreys,Bonnie Lynn</a>	<a href="#">Female</a>	<a href="#">09/26</a>	<a href="#">(blank)</a>	<a href="#">*****1675</a>	<a href="#">USA</a>	<a href="#">SSN</a>	<a href="#">HUMPHREYS</a>

### Steps for completing the viewing of a plan or sub-plan.

<b>Step 1</b>	Locate the student by entering the student <b>ID</b> number, or you can use the drop down for the other search options. <b>Be sure to check the Include History box.</b>
<b>Step 2</b>	Select the <b>Search</b> button.
<b>Step 3</b>	If the <b>Search Results</b> show that the student has been in more than one <b>Career</b> or <b>Program</b> , examine the <b>Search Results</b> and find the <b>Career</b> and <b>Program</b> row that pertains to what you are doing. If there are multiple rows in the same career, the best option is to choose the highest <b>Std Career Nbr</b> .



## 1.1 Student Program

Student Program		Student Plan	Student Sub-Plan	Student Attributes	Student Degrees
Paul SRTesting		000000144			
Academic Career:	Undergraduate	<a href="#">Career Requirement Term</a>		Student Career Nbr: 0	
Find   View All   First 1 of 1 Last					
Status:	Active in Program <span style="float: right;">+ -</span>				
'Effective Date:	03/16/2007	Effective Sequence:		0	
'Program Action:	ACTV	Activate	Action Date:	03/16/2007	
Action Reason:		Joint Prog Appr: <input type="checkbox"/>			
'Academic Institution:	FLCMP	CSU Fullerton	<b>Admissions</b> <input type="checkbox"/> From Application Application Nbr: Application Program Nbr: 0		
'Academic Program:	ECCR	Extension Credit			
'Admit Term:	2077	Fall 2007			
Requirement Term:	2077	Fall 2007			
Expected Grad Term:		'Campus: FUL	Fullerton	'Acad Load:	Full-Time
<span>Save</span> <span>Return to Search</span> <span>Previous in List</span> <span>Next in List</span> <span>Notify</span> <span>Refresh</span> <span>Add</span> <span>Update/Display</span> <span>Include</span>					

<b>Step 1</b>	The <b>Status</b> indicates the student's status. Some of the status listings you may see are Active, on Leave of Absence, Discontinued, etc
<b>Step 2</b>	The <b>Effective Date</b> indicates when the action becomes effective. If there is more than one enter on the Program tab, the Effective Date on top cannot be before the following entry's Effective Date. The <b>Action Date</b> indicates the date the entry was made.
<b>Step 3</b>	The <b>Program Action</b> indicates what update was made.
<b>Step 4</b>	The student's <b>Academic Program</b> is displayed.
<b>Step 5</b>	The <b>Admit Term</b> indicates when the student began the <b>Academic Program</b> at CSUF.
<b>Step 6</b>	The <b>Requirement Term</b> is the Degree Catalog Year requirement term. On the Plan tab, the Reg Term is the requirement term for the specific Plan (e.g. major, minor).
<b>Step 7</b>	If the student has applied for graduation, there will be a date in the <b>Expected Graduation Term</b> and a <b>Degree Checkout Status</b> . If the student has not applied, these fields will be blank.
<b>Step 8</b>	<b>Campus</b> is displayed and will always be FUL.

## 1.2 Student Program

<span style="border: 1px solid black; padding: 2px;">Student Program</span> <span style="border: 1px solid black; padding: 2px; background-color: #e0e0e0;"><b>Student Plan</b></span> <span style="border: 1px solid black; padding: 2px;">Student Sub-Plan</span> <span style="border: 1px solid black; padding: 2px;">Student Attributes</span> <span style="border: 1px solid black; padding: 2px;">Student Degrees</span>	
Paul SRTesting <span style="float: right;">000000144</span>	
<b>Academic Career:</b>	Undergraduate <span style="float: right;"><b>Student Career Nbr:</b> 0 <b>Car Req Term:</b> Fall 1996</span>
<a href="#">Find</a>   <a href="#">View All</a>   First <span style="border: 1px solid black; padding: 0 2px;">2</span> of 4 <a href="#">Last</a>	
<b>Status:</b>	Active in Program <span style="float: right;"><b>Admit Term:</b> Fall 1996</span>
<b>Effective Date:</b>	08/21/2000 <span style="float: right;"><b>Effective Sequence:</b> 0</span>
<b>Program Action:</b>	Plan Change <span style="float: right;"><b>Action Date:</b> 08/21/2000</span>
<b>Action Reason:</b>	Change Plan <span style="float: right;"><b>Requirement Term:</b> Fall 1996</span>
<b>Academic Program:</b>	Undergrad <span style="float: right;"><b>Requirement Term:</b> Fall 1996</span>
<a href="#">Find</a>   <a href="#">View All</a>   First <span style="border: 1px solid black; padding: 0 2px;">1</span> of 2 <a href="#">Last</a>	
<b>*Academic Plan:</b>	<input type="text" value="29CMTVUBA"/> <input type="button" value="🔍"/> *Comm/Television/Film 1MJ 1BA Major <span style="float: right;"><input type="button" value="+"/> <input type="button" value="-"/></span>
<b>*Plan Sequence:</b>	<input type="text" value="10"/> <span style="float: right;"><b>Degree:</b> BA</span>
<b>*Declare Date:</b>	<input type="text" value="08/21/2000"/> <input type="button" value="📅"/> <span style="float: right;"><b>Degree Checkout Stat:</b></span>
<b>*Requirement Term:</b>	<input type="text" value="1967"/> <input type="button" value="🔍"/> Fall 1996 <span style="float: right;"><b>Student Degree Nbr:</b> <a href="#">Credentials</a></span>
<b>*Advisement Status:</b>	<input type="text" value="Include"/> <input type="button" value="▼"/> <span style="float: right;"><b>Completion Term:</b></span>
<span style="border: 1px solid black; padding: 2px;">Save</span> <span style="border: 1px solid black; padding: 2px;">Return to Search</span> <span style="border: 1px solid black; padding: 2px;">Previous in List</span> <span style="border: 1px solid black; padding: 2px;">Next in List</span> <span style="border: 1px solid black; padding: 2px;">Notify</span> <span style="border: 1px solid black; padding: 2px;">Refresh</span> <span style="border: 1px solid black; padding: 2px;">Add</span> <span style="border: 1px solid black; padding: 2px;">Update/Display</span> <span style="border: 1px solid black; padding: 2px;">Include History</span>	

<b>Step 1</b>	The <b>Academic Plans</b> are listed. The type is indicated.
<b>Step 2</b>	<b>Academic Plans</b> are displayed in alphabetical order and you need to scroll through or click "View All" to see if a student has multiple majors (see following note on <b>Plan Sequence</b> ).
<b>Step 3</b>	The academic plan with the lowest <b>Plan Sequence</b> is the "primary major". Majors and minors are both tracked as "Academic Plans".
<b>Step 4</b>	The <b>Requirement Term</b> was first viewable on the Student Program tab. On the Student Plan tab, the Requirement Term is the requirement term for the specific Plan (e.g. major, minor).
<b>Step 5</b>	On the lower right corner of the page the <b>Credentials</b> link. Selection of this link will take you to the credential plan information. See section 1.4 Student Credentials for more information.

### 1.3 Student Sub-Plan

Paul SRTesting		000000144													
<b>Academic Career:</b>	Undergraduate	<b>Student Career Nbr:</b>	0												
Find   View All    First ◀ 1 of 1 ▶ Last															
<b>Status:</b>	Active in Program	<b>Admit Term:</b>	Fall 2007												
<b>Effective Date:</b>	03/16/2007	<b>Effective Sequence:</b>	0												
<b>Program Action:</b>	Activate	<b>Action Date:</b>	03/16/2007												
<b>Action Reason:</b>															
<b>Academic Program:</b>	Extension Credit	CSU Fullerton													
Find   View All    First ◀ 1 of 1 ▶ Last															
<b>Academic Plan:</b>	Ex Ed Undegraduate Generic ND Specialization														
<b>Requirement Term:</b>	Fall 2007														
Find   View All    First ◀ 1 of 1 ▶ Last															
+ -															
<div style="border: 1px solid red; padding: 5px;"> <table style="width: 100%;"> <tr> <td style="width: 30%;">'Academic Sub-Plan:</td> <td><input type="text"/></td> <td><input type="button" value="🔍"/></td> </tr> <tr> <td>'Academic Sub-Plan Type:</td> <td colspan="2"></td> </tr> <tr> <td>'Declare Date:</td> <td><input type="text" value="03/16/2007"/></td> <td><input type="button" value="📅"/></td> </tr> <tr> <td>'Requirement Term:</td> <td><input type="text"/></td> <td><input type="button" value="🔍"/></td> </tr> </table> </div>				'Academic Sub-Plan:	<input type="text"/>	<input type="button" value="🔍"/>	'Academic Sub-Plan Type:			'Declare Date:	<input type="text" value="03/16/2007"/>	<input type="button" value="📅"/>	'Requirement Term:	<input type="text"/>	<input type="button" value="🔍"/>
'Academic Sub-Plan:	<input type="text"/>	<input type="button" value="🔍"/>													
'Academic Sub-Plan Type:															
'Declare Date:	<input type="text" value="03/16/2007"/>	<input type="button" value="📅"/>													
'Requirement Term:	<input type="text"/>	<input type="button" value="🔍"/>													
+ -															
<span>Save</span> <span>Return to Search</span> <span>Notify</span> <span>Refresh</span> <span>Add</span> <span>Update/Display</span> <span>Include History</span> <span>Correct History</span>															

<b>Step 1</b>	<b>To view the student's sub-plan, select the tab Student Sub-Plan.</b>
<b>Step 2</b>	<b>The Academic Sub-Plan and Declare Date for the sub-plan can be viewed on the lower portion of the screen.</b>
<b>Step 3</b>	The <b>Requirement Term</b> is the requirement term for the specific sub-plan.

### 1.4 Student Credentials

Student Program	Student Plan	Student Sub-Plan	Student Attributes	Student Degrees
Paul SRTTesting		000000144		
<b>Academic Career:</b>	Undergraduate	<b>Student Career Nbr:</b>	0	<b>Car Req Term:</b> Fall 2007
Find   View All First 1 of 1 Last				
<b>Status:</b>	Active in Program	<b>Admit Term:</b>	Fall 2007	
<b>Effective Date:</b>	03/16/2007	<b>Effective Sequence:</b>	0	
<b>Program Action:</b>	Activate	<b>Action Date:</b>	03/16/2007	
<b>Action Reason:</b>		<b>Requirement Term:</b>	Fall 2007	
<b>Academic Program:</b>	EECR			
Find   View All First 1 of 1 Last				
<b>*Academic Plan:</b>	BOEEGNUND Ex Ed Undergraduate Generic ND Specialization			
<b>*Plan Sequence:</b>	10	<b>Degree:</b>		
<b>*Declare Date:</b>	03/16/2007	<b>Degree Checkout Stat:</b>		
<b>*Requirement Term:</b>	2077 Fall 2007	<b>Student Degree Nbr:</b>		
<b>*Advisement Status:</b>	Include	<b>Completion Term:</b>		
<a href="#">Credentials</a>				
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>				

**Step 1** On the Credentials Data Subpanel, you can see information related to the student's credential status. If the student is not pursuing a credential, this page will be blank




#### Credential Data Subpanel

Credential Data		Find   View All	First 1 of 1 Last
<b>Credential Status:</b>	5-Admit/Enroll/Integratd PBAC	<b>ERSS Reporting Row</b>	<input checked="" type="checkbox"/>
<b>Status Date:</b>	03/05/2008	<b>Subject Matter Objective Code:</b>	100
<b>Exp Date:</b>		<b>Credential Class:</b>	01
<b>Issuance Date:</b>		<b>Credential Action:</b>	08
<b>Credential Emphasis:</b>	1	<b>Competency Determination:</b>	
<input type="button" value="+"/> <input type="button" value="-"/>			
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/>			



### 1.5 Student Degrees

Student Program | Student Plan | Student Sub-Plan | Student Attributes | **Student Degrees**

Minnie Mouse 899917108   

**Academic Career:** Undergraduate **Student Career Nbr:** 0

Find | View All First 1 of 4 Last









<b>Status:</b>	Active in Program	<b>Admit Term:</b>	Spr 2006
<b>Effective Date:</b>	03/05/2008	<b>Effective Sequence:</b>	1
<b>Program Action:</b>	Data Change	<b>Action Dt:</b>	03/05/2008
<b>Action Reason:</b>	Change ExpGradTerm or Degr Chk		
<b>Academic Program:</b>	Undergraduate Degree		
<b>Requirement Term:</b>	Spring 2006		

**Degree Checkout Stat:** Applied

Completion Term: Applied Degree GPA:

Degree Honors 1: Approved

Degree Honors 2: Awarded

Save | Return to Search |  |  Next in List |  Notify |  Refresh |  Add |  Update/Display |  Include History |  Correct History

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Attributes](#) | [Student Degrees](#)

<b>Step 1</b>	By selecting the Student Degrees tab, you can view the status of the student's application for graduation in the Degree Checkout Stat field. If a degree has been awarded, this can also be viewed on this screen. There is one value in the drop down box for the Degree Checkout Stat field (Awarded) which identifies the awarding of a degree.
---------------	--