Senior Academic Advising

Training Guide

Senior Academic Advising
SA - Advising

UNIVERSITY OF CALGARY

Table of Contents

Checking Requisites

There are two pages designed to enable staff to view the requisites and registration restrictions for individual courses.

Begin with the **Class Registration Information page,** as it summarizes information which includes links to the **UofC Requisite Summary,** which provides detail on the specific requisites.
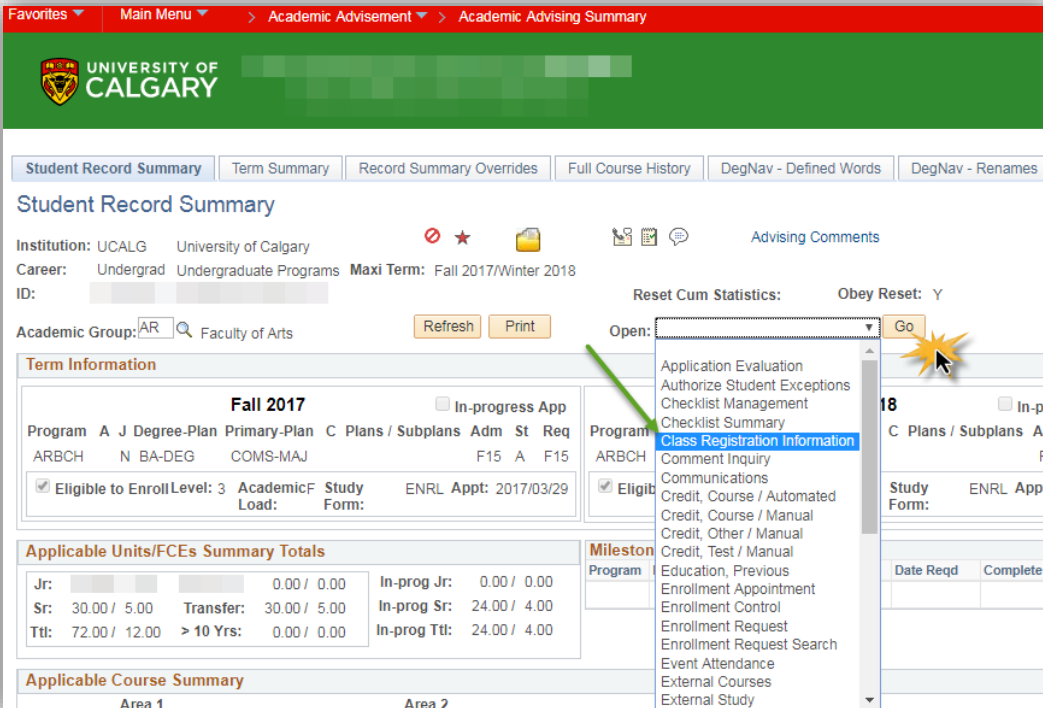
Note:
It is **NOT** recommended to navigate directly to the UofC Requisite Summary Screen, as it is difficult to find the correct record. Use the Class Registration Information screen first to access the UofC Requisite Summary.

Class Registration Information Screen

Navigation: **Curriculum Management > Enrollment Requirements > Class Registration Information**

1. Navigate to the screen using the menu path above or choose **Class Registration Information** from the drop-down 'Go' menu on the Academic Advising or Student Status screens.

2. Enter the term in which the course is offered, and the course name and number and click **Search**.

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This displays the **Class Registration Information** screen.

- The information in the header explains the course.
- The **Course Requirement** and **Consent Required** fields provide information about the course as a whole – i.e., those requisites that apply to the course regardless of which section of the course you are interested in. Note that the **Course Requirement** value is a clickable link.

The **grid** contains the bulk of the information on the screen. The fields from left to right:

- **Class** – the individual sections offered for the course (eg. Lecture 01, Lab B01, Tutorial T01)
- **Crse Topic** – the topic id associated with that section (if applicable)
- **Class Nbr** – the unique number that identifies this section for this term for registration purposes
- **Status** – 'Open' or 'Closed' to indicate whether the course has spaces available or is full
- **Cap Enrl** – the enrolment cap (max number of students that can register)

- **Tot Enrl** – total number of students enrolled
- **Assoc Class** – a number to indicate which combination of requested sections is satisfactory. Students must register in a lab and/or tutorial with the same associated class number as the lecture. For example, students registering in Lec 01 must register in Tut T01 (as they both have an associated class number of 1). Those registering in Lec 02 must register in tutorial T02 (as they both have an associated class number of 2).
- **Class Requirement** – if an individual section of a course has DIFFERENT requisites, there will be a link to those unique requisites in his field.
- **Catlg Requirement** – a 'yes' or 'no' flag to indicate whether the requisites that apply to the course as a whole also apply to this specific section of the course.

The next five fields are all related to **Reserve Capacity** which is the method used to reserve part or all of a section of a course for students in a particular program or programs, until a certain date.

Note on Restrictions:

If a course has a program restriction that does not come off at any point, then that restriction will be built into the requisites (along with any prerequisites); this kind of restriction can be viewed by clicking the link in the **Course Requirements** field. If a particular *section* of a course (but not the course as a whole) has a program restriction that does not come off, then a requisite will be created and there will be a link to it in the **Class Requirement** field. ***Any restriction that is lifted as of a particular date must be defined in terms of reserve capacity.***

- **Reserve Capacity Sequence** – a sequence number, to differentiate between reserve capacities if a course has more than one
- **Capacity Requirement** – a brief description of the restriction – this is a clickable **link** which will take you to the UofC Requisite Summary screen for details.
- **Start Date** – the date on which the restriction comes into effect.
  NOTE THAT THERE IS NO END DATE. The only way to indicate when the restriction comes off is to create a second reserve capacity using the date that the restriction comes off as the 'start date', with the number of spaces reserved on that date set to 0.
- **Reserve Cap** – the number of spaces in the course reserved for students as defined by the Cap (in the above example, 15 spots are reserved for BMEC Students only).
- **Reserve Cap Used** – the number of students who meet the restriction who have registered since it came into effect.
  Note: If an error is made and the reserve capacity isn't added to the course until after registration starts, this total will not accurately reflect the number of students in a particular program who are registered in the course.
- **Consent Required** – The final field in the grid simply indicates if a particular section of a course requires 'consent of the department' even if the course as a whole doesn't.

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UofC Requisite Summary Screen

In the Student Administration System, requisites and restrictions are defined in terms of 'requirements' and 'requirement groups'. The full set of prerequisites and program restrictions associated with a course may require that a number of different 'requirements' or 'requirement groups' be attached to that course; as each is identified by a unique number, rather than by a description or by the name of the course they are attached to (as the same requirement might be attached to many courses) it is very difficult to locate all the requirements and requirement groups that affect a course.

The **Class Registration Information** screen was designed to solve this problem. It displays all of the requirements associated to a course; they appear as clickable links in the **Course Requirement**, **Class Requirement** and/or **Capacity Requirement** fields.

Clicking on any of these links will take you to the **UofC Requisite Summary** screen for the detail associated with that requirement group.

For example, if you click on the link in the **Course Requirement** field for ENGG 349 you will see the detail for requirement group 001797 (this is the important identifier for the record, as the description, subject and catalog number fields are just text and may not be fully informative).

- Here you see the **prerequisite** as defined in the calendar. This is just text.
- The **grid** contains the actual definition used by the system.
- It is important to read the combination of conditions carefully and pay attention to any parenthesis used to group the requirements to make sure you understand the requisite completely. The above requisite indicates that students must have a prerequisite of AMAT 217 completed with a grade of D or better (as defined in the GPV field) AND that they must have a prerequisite of AMAT 219 AND a prerequisite of ENGG 205.

    Note: The course id number is included beside the prerequisite courses to help you troubleshoot. It is possible, if multiple versions of a course exist, that the requisite will include a version other than the one a student has on their record.

Returning to the **Class Registration Information** screen, if you click on the link in the **Capacity Requirement** field for the same course you will see that as of April 20th, 2009 15 seats are reserved for BMEC Students only. This explains what requisites and restrictions that apply to this course.

Prerequisite Checker

Re-Checking Prerequisites after Registration

Navigation: **Record and Enrolment > Term Processing > End of Term Processing > Pre-requisite Checker**

This batch process allows you to obtain a list of students who registered in courses for a particular term without the requisite as defined in the Student Administration System. As it is only checking course level requisites, it is important to note that **it will NOT report**:
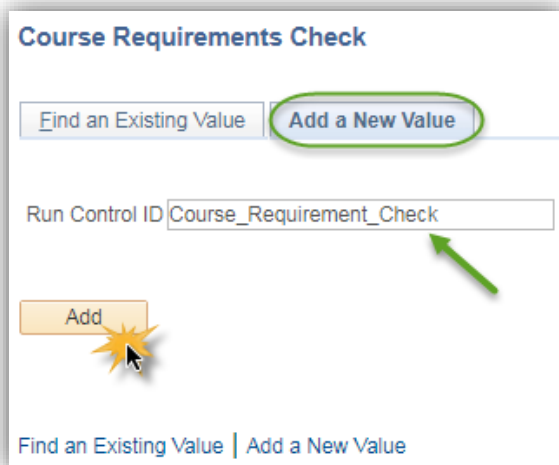
- students who are registered in a senior level course without having completed 3 full junior level courses
- students who violate a registration restriction (i.e., a Haskayne student registered in a course restricted to PSYC majors only) unless that restriction is defined as a requisite along with the courses prerequisites (i.e., it will not report students who violate a restriction defined in terms of a class level restriction or reserve capacity).
- students who are repeating a course for a third or subsequent time
- students who have since had a block placed on their record preventing enrolment in the course
- students who have an Allow action for the course on the Enrollment Control screen for this term

Note:

It is important to look at the defined requisite before deleting students from courses as the student may have an acceptable prerequisite that is not recognized by the system. For example, a course may be defined as requiring a grade of 70% or better in MATH HS030 or PMAT HS030. If the student lacks those courses but has upgraded their math through Continuing Education or has an acceptable A or O level math, they will appear on the list even though they are okay to take the course.

Running the Prerequisite Checker

1. Go to the **Prerequisite Checker** and set up a **Run-Control ID**.   You will then have access to the **Course Requirements Check** run control. You can run the process for all students by filling in just the institution and term, but you can more usefully narrow your selection by using the other fields.

- Fill in the **Subject Area** if you want to see only students who do not meet the requisites for courses in that subject (e.g. MATH).
- Add **Catalog Number** if you only want the students lacking the requisite for a particular course (e.g. MATH 271).
- Add **Class Section** if you only want to retrieve those students lacking the requisite for a particular section of a course (ex., MATH 271 Lec 01)
- At minimum, you may wish specify your faculty as this will narrow the search results to those whose primary program is your faculty.

2. Run the report as usual.

- Click on **Run**.
- On the Process Scheduler Request ensure the format is CSV: click **OK.**
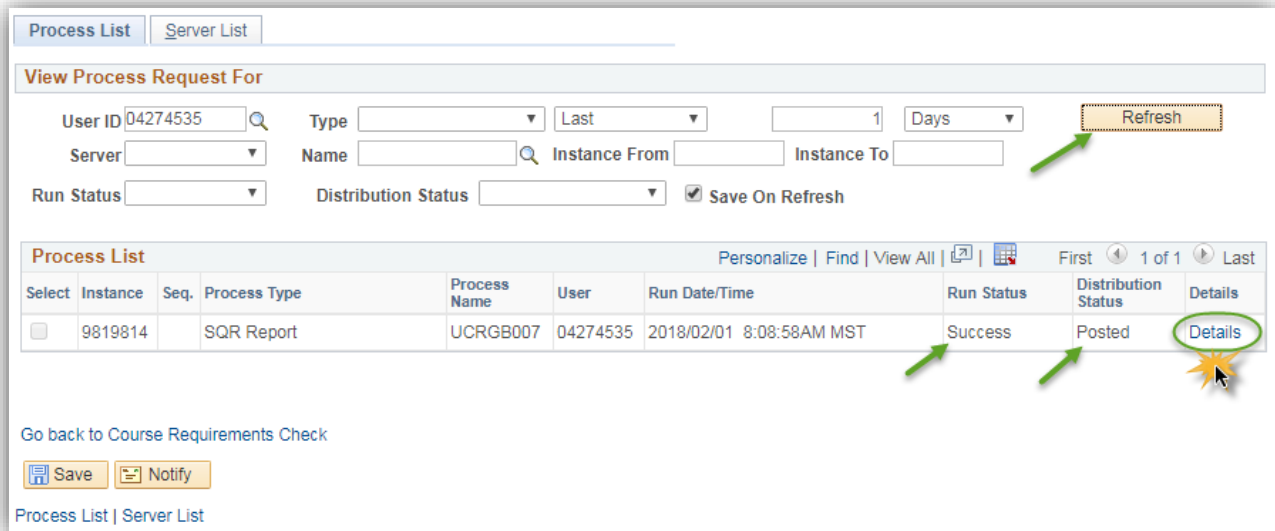
- Click the **Process Monitor** link to monitor the status of your request. Click **Refresh** to monitor the Run Status.
- When the **Run Status** shows **Success** and the **Distribution Status** shows **Posted**, click the **Details** link.
- Click the **View Log/Trace** link.

3. The file list displays several output files, **click** on the file: **ucrgb007_Req_check_errs.csv**.

The output will open in Excel and appear as follows (*for FOIP reasons some information has been removed*).

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	TERM	SUBJECT	CAT NO	STUDENT ID	STUDENT NAME	ACAD ORG	DEGREE PLAN	PRIMARY PLAN	ACAD GROUP2	SUBJECT2	CAT NO2	GRADE	MESSAGE
2	2181	MATH	211	300		AR	BSC-DEG	EASC-MAJ		MATH	261		
3	2181	MATH	265	300		AR	BA-DEG	ECON-MAJ		MATH	275*		
4	2181	MATH	271	300		AR	BLNK-DEG	NODC-MAJ		MATH	213		
5	2181	MATH	271	300		AR	BA-DEG	PSYC-MAJ		MATH	213		
6	2181	MATH	271	300		AR	BA-DEG	LWSO-MAJ		MATH	213		

- **Term** – the term you ran the report for (e.g. 2181 Winter 2018)
- **Subject/Cat No** – the course for which the student is lacking the requisite
- **Student ID/Student Name** – identifies the student with the problem (*Removed for FOIP Reasons*)
- **Academic Org** – the Faculty the student is in based on the one selected (e.g. AR Arts)
- **Degree Plan/Primary Plan** – the degree and major the student is in
- **Acad Group2/Subject2/Cat No2/Grade/Message** – the requisite that the checker indicates is missing. This will be the first requisite it encounters that is not met therefore this is not a definitive guide to the problem. Always investigate further to ensure they do not meet the requisite before taking action.

Troubleshooting Registration Problems
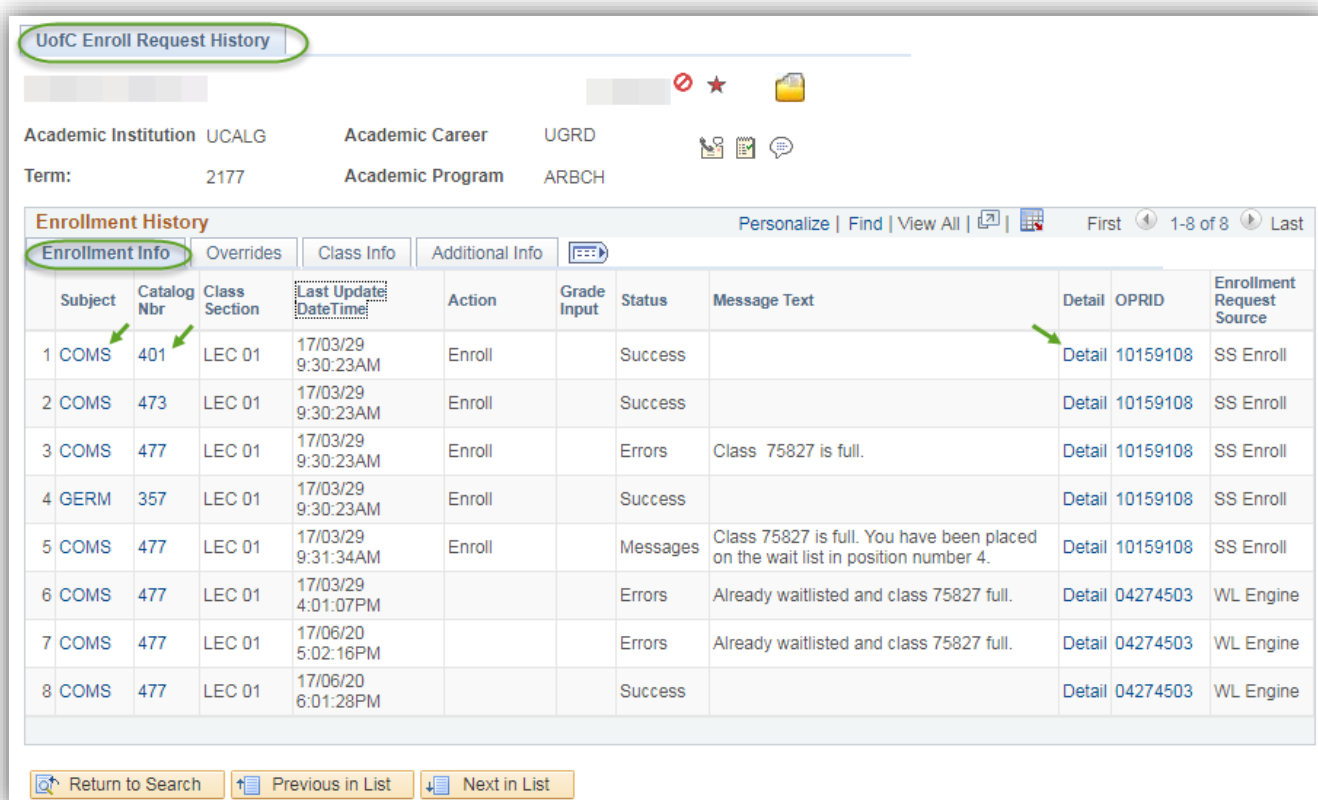
UofC Enroll Request History

Navigation: **Records and Enrollment > Enroll Students > UofC Enroll Request History**
Or
Choose UofC Enroll Request History from the Open List menu from the Advising Summary or Student Status screens.

UofC Enroll Request History provides details on each registration transaction on a student's record for each term.

Tip: Click on the Last Update Date/Time to sort the information in ascending order.

The **Enrollment Info** tab has the most commonly required information plus the following links:

- **Subject/Catalog Number** – navigates to the **Class Registration Information** screen to review requisites, restrictions, whether a section is open or closed, etc.
- **Detail** – navigates to the full text of the **Message Text** field in case there are multiple messages that do not appear on this screen.

- **OPRID** – navigates to a screen identifying who initiated the transaction. In cases where the Enrollment Request Source indicates a batch process, the OPRID identifies the individual who ran the batch process.
- **Enrollment Request Source** – SS Enroll indicates the student has registered through Self Service

Notes:

For Swap actions, the value in the **Action** field will have a –D or –E appended to make it easier to tell which course the student dropped and added in the same action.

When the **Status** is '**Messages**' check the messages carefully to see what the outcome was – the action may or may not have been successful.

The **Overrides** tab provides an indication of what, if any, overrides applied to a transaction.

The **Additional Info** tab provides a link to the **Enrollment Request** screen, if you need further detail about a transaction. It takes you directly to the correct **Enrollment Request Id**.
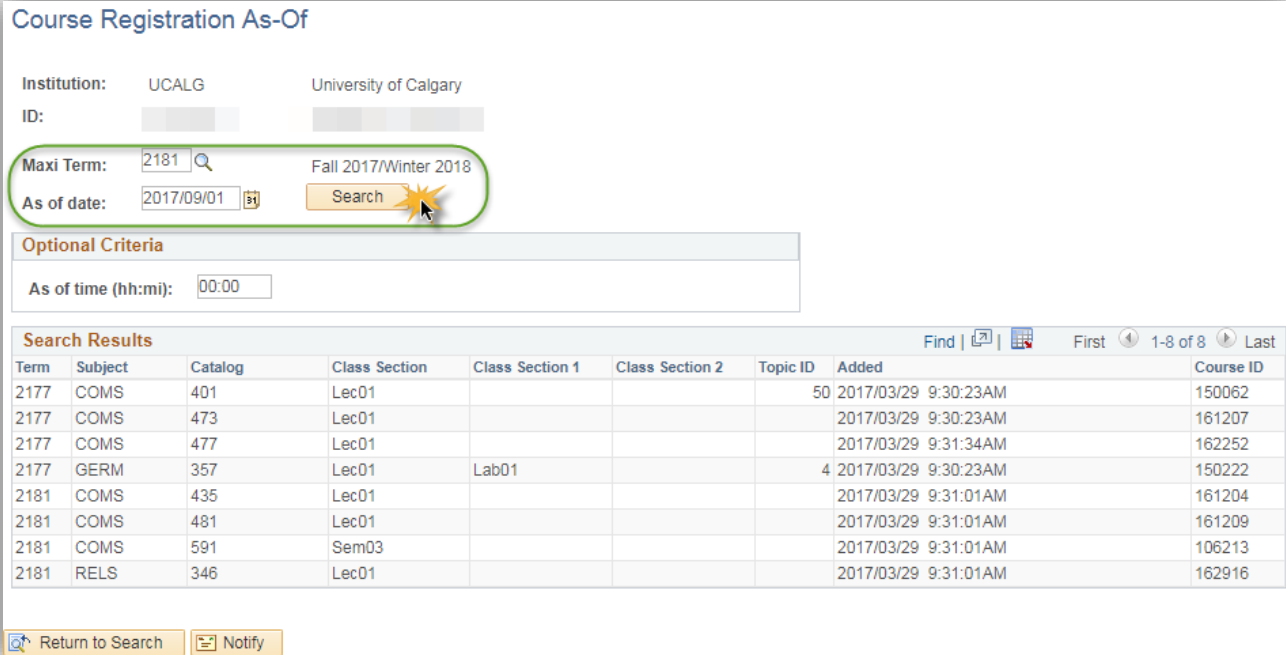
Note the **Sequence Number** associated with the Enrollment Request ID. If it is greater than 1, that indicates that the course was part of a set of courses that the student submitted from their shopping cart, rather than individually. On **Enrollment Request**, ensure you are looking at the correct sequence number for the transaction you are interested.

Course Registration As-Of Screen

Navigation: **Records and Enrollment > Student Term Information > Course Registration As-Of**

The **Course Registration As-Of** screen will reconstruct exactly what a student was registered in for a maxi-term, as of a particular date and time. While not commonly used, it is extremely useful when trying to trace a problem with a student's record back through multiple registration changes.

1. To begin, specify the **Maxi Term** you want to view by entering the 2nd term of the maxi and the **As-of Date**.

- The time is optional and will default to midnight of the date entered if no other time is specified.
- Click **Search**.

Course Registration As-Of

Institution:	UCALG		University of Calgary		
ID:					

Maxi Term:	2181	Fall 2017/Winter 2018	
As of date:	2017/09/01	Search	

Optional Criteria

As of time (hh:mi): 00:00

Search Results   Find | | | First 1-8 of 8 Last

Term	Subject	Catalog	Class Section	Class Section 1	Class Section 2	Topic ID	Added	Course ID
2177	COMS	401	Lec01			50	2017/03/29 9:30:23AM	150062
2177	COMS	473	Lec01				2017/03/29 9:30:23AM	161207
2177	COMS	477	Lec01				2017/03/29 9:31:34AM	162252
2177	GERM	357	Lec01	Lab01		4	2017/03/29 9:30:23AM	150222
2181	COMS	435	Lec01				2017/03/29 9:31:01AM	161204
2181	COMS	481	Lec01				2017/03/29 9:31:01AM	161209
2181	COMS	591	Sem03				2017/03/29 9:31:01AM	106213
2181	RELS	346	Lec01				2017/03/29 9:31:01AM	162916

Return to Search   Notify

This displays a grid of courses the student was fully registered in at that particular date and time, sorted by term, then subject, then catalogue number, as well the date and time each course was added and the course id.

CRED Replacement

Navigation: **Records and Enrollment > Transfer Credit Rules > UofC CRED Rules**

The UofC CRED Rules displays information from the Transfer Credit Database maintained by the Admissions Office. Navigate and select the transferring institution you are interested in (e.g. Mount Royal University). You can then search by course name/number, by subject only, or by the equivalent U of C course.

Notes:
- Begin and End dates for the course
- Click on the 'paper' icon to display any comments or notes associated with a course
- Group credits will appear together in the same line on the grid
- This database does not include **all** transferable courses

On-line Change of Program through the Student Services Center

Navigation: **Campus Community > Student Services Center**
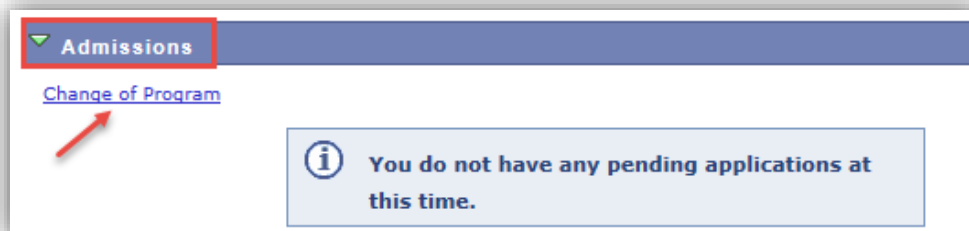
The on-line change of program application used by students to request a change of program is also available for staff use through the Student Services Center. There are a number of advantages to using this application to enter a change of program request on behalf of a student: you can enter a minor change without having to re-enter the student's entire program from the beginning. There is no concern if an application for the term already exists. It is also easier to add or modify combined degrees using the on-line application.

Notes:
The dates that control whether the Change of Program application is available for students to use for a given term, and what the deadline for application is for each term, do not apply in the staff version. Staff will therefore have multiple terms available to select from where students will only have one. (**Note**: when changing the desired term, click the 'Go' button). Staff will also be able to submit an application beyond the application deadline for a term. It is up to the staff member to use it appropriately - remembering the deadlines and putting up changes for only your own faculty.

The application will allow you to enter a CF1 (change of Faculty) type change (which makes remembering deadlines, etc. even more important). You will still not be able to approve a CF1 change – only the Admissions Office has the access to do that.

Most faculties have chosen to only have the application available for the Fall term as there tends to be restrictions on the changes allowed for the Winter term. It IS possible to have the application available for a particular faculty for staff use only, and it is also possible to have it available for a faculty but not for certain specified programs. However, there is no way to restrict changes to only CF3 (those not involving a change of faculty) type changes.

Always check the request using the Program/Plan Summary screen after submitting it to make sure it looks as you intended.

Academic Requirements Report

The following is the process to complete a request for an Academic Requirements Report (AR Report) to aid in performing a degree audit for undergraduate students. This is an example of a student pursuing a single degree. For additional information on the Academic Requirement component, consult the student administration training website.
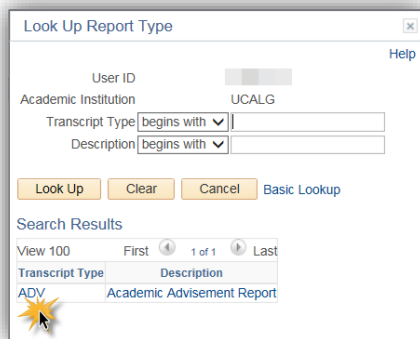
Navigation: **My UofC Portal > Quick Links > Academic Advisement.**
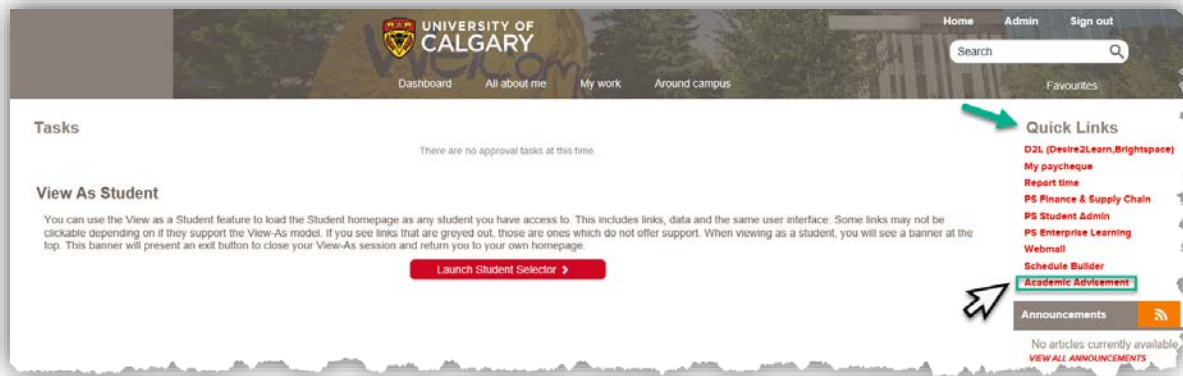
1. Click the **Academic Advisement** link if already logged into PeopleSoft.

    ▸ Academic Advisement

2. Click the **Student Advisement** link.

    Student Advisement

3. Click the **Request Advisement Report** link.

    Request Advisement Report

4. Click the **Add a New Value** tab.

    Add a New Value

5. Enter the desired student ID number. Click the **Look up Report Type** button.

    🔍

6. Note: The report type will always be ADV. You can enter it directly or select it. **Tip:** Add ADV to Report Type in Setup SACR > User Defaults > User Defaults 4 tab. Click the **ADV Academic Advisement Report** link.

7. Click the **Add** button.
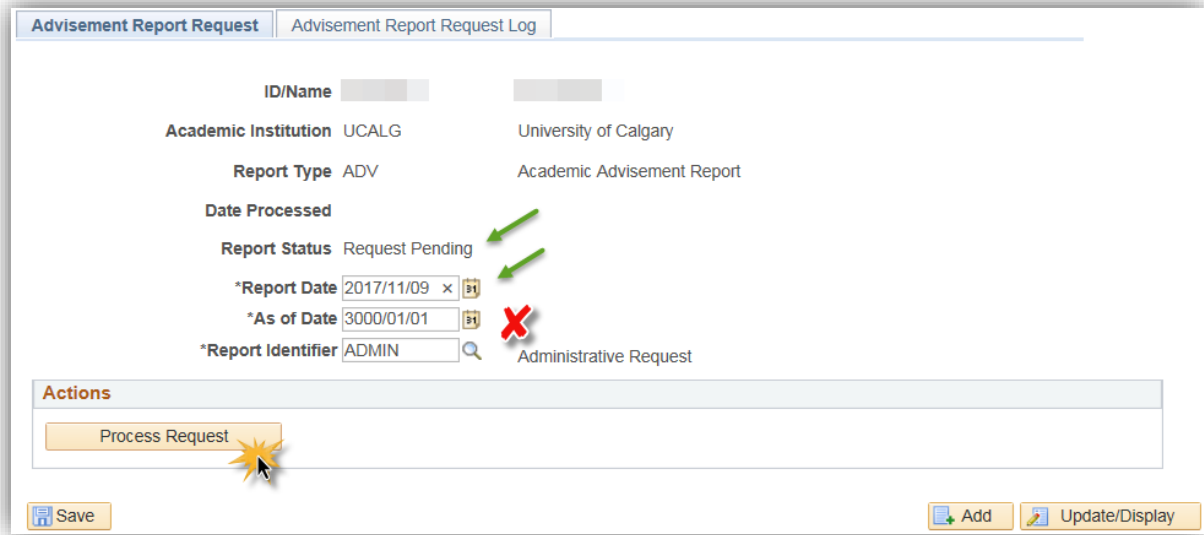
8. On Report Request, the ID/Name of the student will display. The Report Status will indicate Request Pending and the current date displays (e.g. 2017/11/09). The As of Date is defaulted to 3000/01/01 and the Report Identifier is defaulted to ADMIN (Administrative Request). Do not adjust these values. To generate an Advisement Report press the Process Request button. **Note:** It can take up to 30 seconds to generate an advisement report if changes have been made to the student's registration since the last advisement report was generated. Click the **Process Request** button.
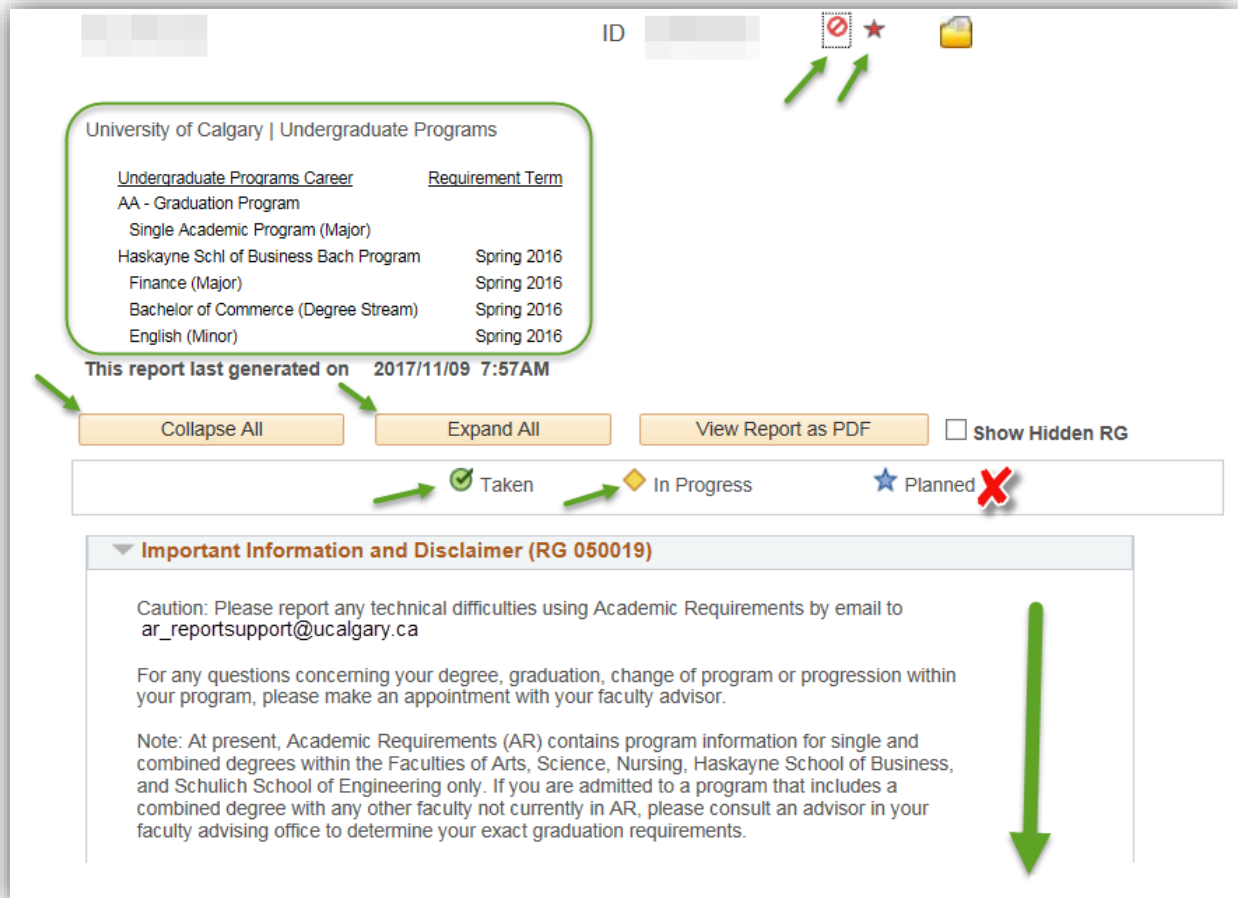
9. The Academic Requirements Report will display the student name and ID and any service indicators. The student program and the Academic Calendar regulation year (Requirement Term e.g. Spring 2016).

    The Academic Requirements Report will display in an expanded format (default) featuring the requirements that are **not satisfied**. The legend indicates status icons for courses that are Taken or In Progress. Note: the "Planned" icon is a PeopleSoft function that is currently not in use at the U of C.

    Scroll down through the report to view the requirements that are not satisfied. If desired, you may use the Collapse All and Expand All buttons to change the level of detail visible in the Advisement report.

University of Calgary | Undergraduate Programs

Undergraduate Programs Career	Requirement Term
AA - Graduation Program	
Single Academic Program (Major)	
Haskayne Schl of Business Bach Program	Spring 2016
Finance (Major)	Spring 2016
Bachelor of Commerce (Degree Stream)	Spring 2016
English (Minor)	Spring 2016

This report last generated on 2017/11/09 7:57AM

Collapse All | Expand All | View Report as PDF | ☐ Show Hidden RG
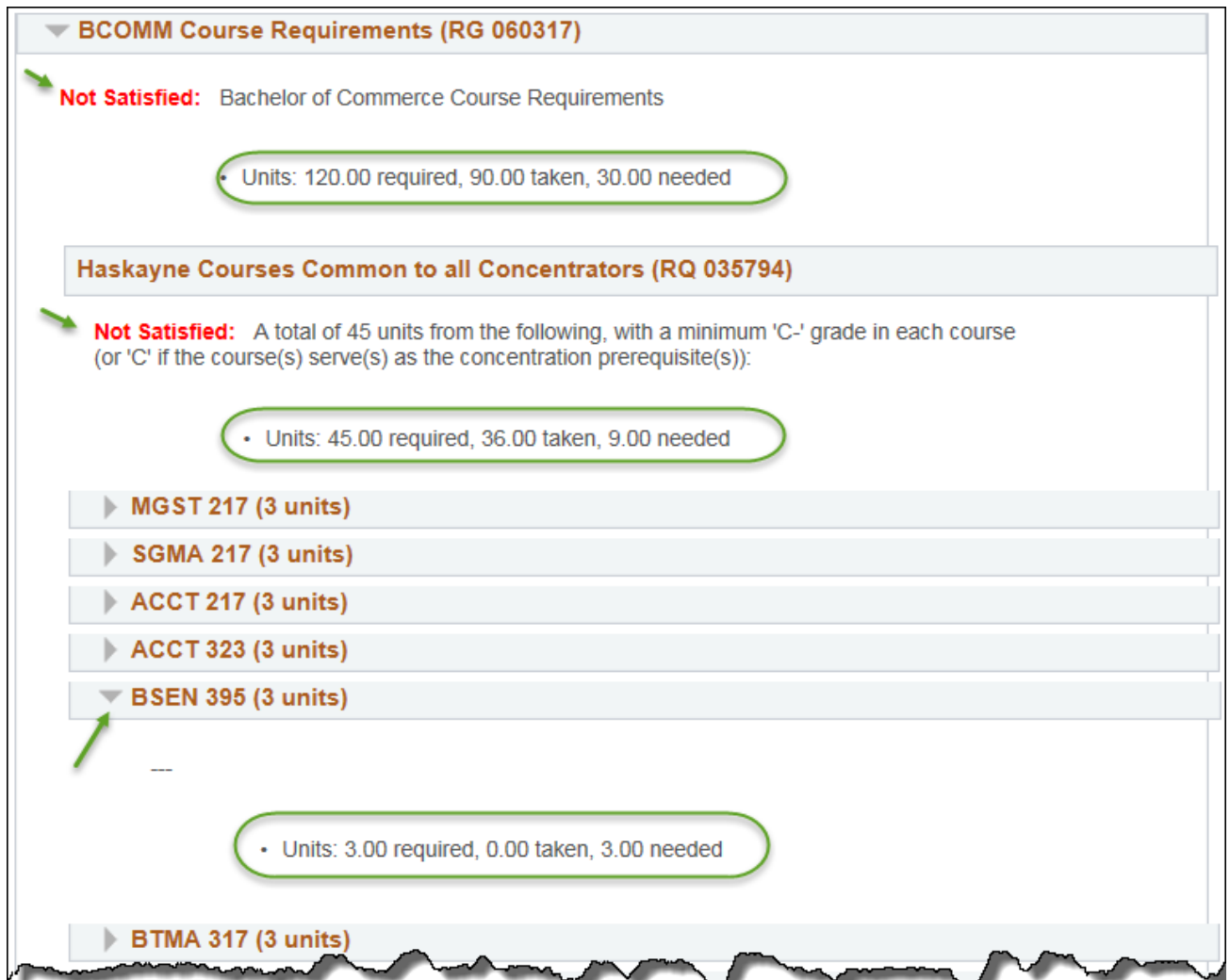
✅ Taken ◆ In Progress ⭐ Planned

▼ **Important Information and Disclaimer (RG 050019)**

Caution: Please report any technical difficulties using Academic Requirements by email to ar_reportsupport@ucalgary.ca

For any questions concerning your degree, graduation, change of program or progression within your program, please make an appointment with your faculty advisor.

Note: At present, Academic Requirements (AR) contains program information for single and combined degrees within the Faculties of Arts, Science, Nursing, Haskayne School of Business, and Schulich School of Engineering only. If you are admitted to a program that includes a combined degree with any other faculty not currently in AR, please consult an advisor in your faculty advising office to determine your exact graduation requirements.

10. Note the Requirement Group, BCOMM Course Requirements, shows as **Not Satisfied**. Scroll down within the requirements to see specific course requirements that have not yet been completed. The next part of the lesson will demonstrate how to investigate each requirement group.

11. Next we will process through each requirement group individually. For ease of viewing click Collapse All. Click the **Collapse All** button.

    Collapse All

12. Note the requirement groups are now collapsed. Click the **Expand section** link.

13. The Important Information and Disclaimer requirement group contains generic information and explains how to report technical problems to ar_reportsupport@ucalgary.ca. It also provides information on how to use the report.

    Additional information is relative to the specific details for the program in which the student is enrolled (e.g. Haskayne School of Business Degree Audit Information). Additional information displays in the expanded area specific to the program (e.g. Haskayne School of Business). Click the **Expand section** link.

14. When completed with this particular Requirement Group you can collapse the area for ease of viewing. Click the **Collapse section** link.

15. Expand the requirement group to view information for the courses required for graduation in the Requirement Group BCOMM Graduating and Limiting Requirements. Click the **Expand section** link. Displayed are the specific requirements related to BCOMM Graduating and Limiting Requirements for Haskayne School of Business. In some cases this requirement group highlights the total number of courses that must be completed for the credential to be awarded. When completed viewing collapse the section. Click the **Collapse section** link.

16. To investigate the BCOMM Course Requirements expand the section. Click the **Expand section** link. Note that the units are 120.00 required; 90.00 taken and 30.00 are needed. There are several groups in this section (Haskayne Courses Common to All Concentrators). By default the not satisfied requirement group is expanded. Scroll down to view.
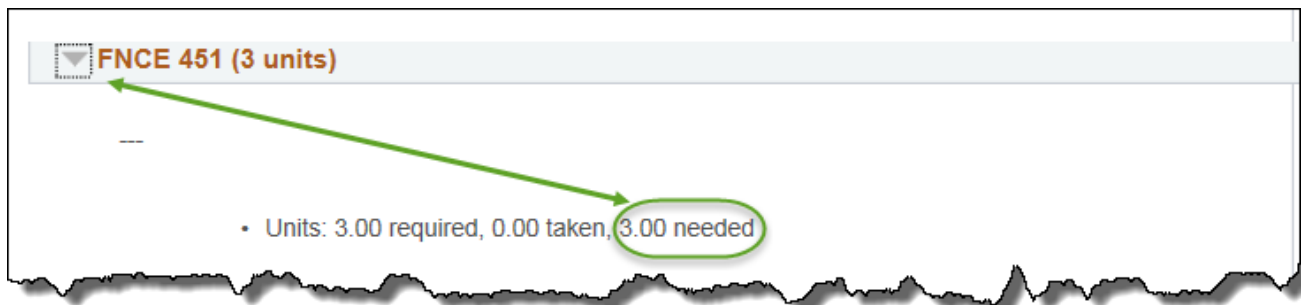
17. Note the Concentration in Finance has not been satisfied; 12.00 units are still needed.
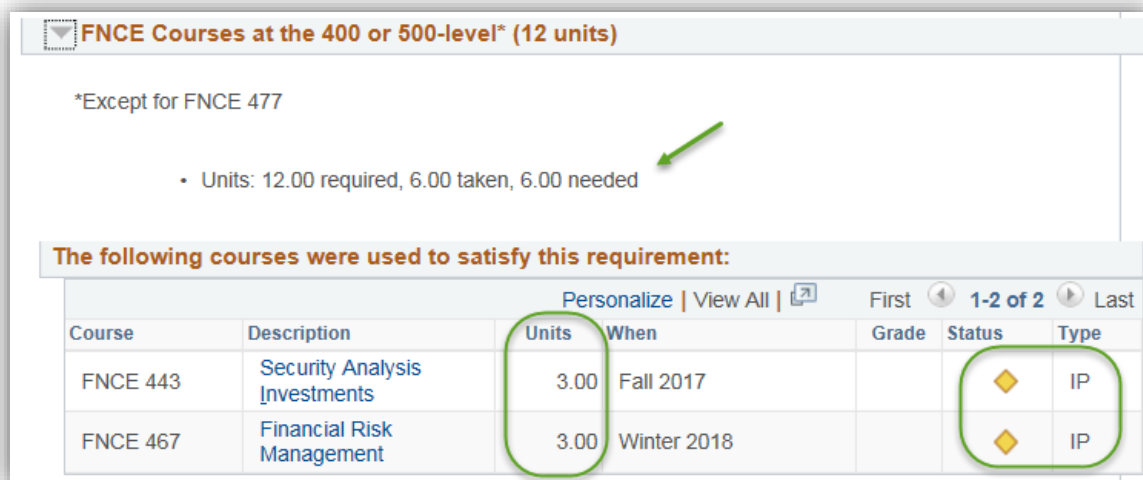Click the **Expand section** link.

18.   Note FNCE 451 is needed. Click the **Collapse section** link.

FNCE 451 (3 units)

• Units: 3.00 required, 0.00 taken, 3.00 needed

19.   To investigate the FNCE Courses at the 400 or 500-level, click the **Expand section** link. Note the 2
FNCE courses that are in progress (FNCE 443 and 467). Units are counted when a course is in
progress. When completed viewing, click the **Collapse Section** link.

FNCE Courses at the 400 or 500-level* (12 units)

*Except for FNCE 477

• Units: 12.00 required, 6.00 taken, 6.00 needed

The following courses were used to satisfy this requirement:

Personalize | View All | 🔲   First ◀ 1-2 of 2 ▶ Last

Course	Description	Units	When	Grade	Status	Type
FNCE 443	Security Analysis Investments	3.00	Fall 2017		◆	IP
FNCE 467	Financial Risk Management	3.00	Winter 2018		◆	IP

20.   To investigate the ECON 301, etc. requirements, click the **Expand section** link. Note 3.00 units are
needed. When completed viewing, click the **Collapse section** link.

ECON301, ECON303, ECON341, ECON373, ECON387 or ECON395 (3 units)

• Units: 3.00 required, 0.00 taken, 3.00 needed
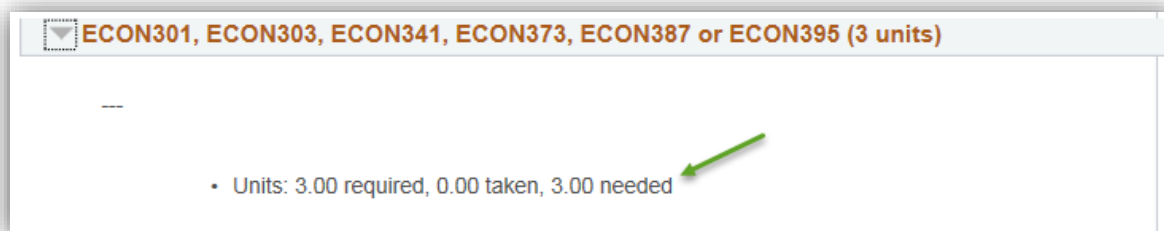
21.   Further investigation displays Senior Options are not satisfied. 9.00 Units are still needed.
When completed collapse the requirement group. Click the **Collapse section** link.

22. Now we will investigate the English Minor requirement group. Click the **Expand section** link and note the English Minor requirements that are still required (6.00 needed).

23. Note the units have been satisfied for the first line of the Foundation Program (6.00 taken). When completed viewing, click the **Collapse section** link.

24.   Note the units are satisfied for the second line of the Foundation Program. ENGL340 has been discontinued, but it is honoured, even though it's no longer offered. When completed viewing, click the **Collapse section** link.

25.   Note that there are outstanding units (3.00 needed) for ENGL205 or ENGL311. When completed viewing, click the **Collapse section** link.

26. Note the requirements are not satisfied for this requirement group (15.00 required, 12.00 taken and 3.00 units needed). When completed viewing, click the **Collapse section** link.

27. Next we will investigate the BCOMM Summary of Applied Courses. Click the **Expand section** link. Note the information regarding course requirements (language proficiency, etc.). Click the **Expand section** link.

28. A list of course requirements display. Remember to click View All to see the entire list of courses. Note for FOIP reasons some information has been removed. Click the **View All** link. Scroll down to view the courses taken (green circle) and in progress (yellow diamond). When completed viewing, collapse the section. Click the **Collapse section** link.

29. Now we will investigate the BCOMM Unused Courses requirement group. Click the **Expand section** link. Note: Categories of unused courses can vary by academic program and only appear when applicable to the student (e.g. the Repeated Courses section only appears if the student has actually repeated courses). This example displays a "W" grade. When completed viewing, click the **Collapse section** link.

30. Show Hidden RG may be useful for more advanced AA staff users to understand how the system is interpreting a student's record of course work. In most cases, this additional information is not essential to the use of AA. In a few cases, the hidden RG's may yield answers behind why courses are or are not appearing in the report as expected. Note: Students do not see the Show Hidden RG checkbox in their advisement report. Click the **Show Hidden RG** option at the top of the report.

31. By default the requirement groups all expand. For ease of viewing collapse all.
Click the **Collapse All** button.

32. Note the additional Requirement Groups that display. To re-hide the hidden requirement groups deselect the Show Hidden RG group. Click the **Show Hidden RG** option.

> Important Information and Disclaimer (RG 050019)

> Common Unused: HS, Min D, ETD, AftDeg,NFC (RG 021043) Hidden

> Co-op/Internship Course(s) (RG 050026) Hidden

> BCOMM Unused Courses Below Min Grade and/or N/A (RG 027001) Hidden

> BCOMM Run1 Pre-Limiting Requirements (RG 060283) Hidden

> 2015-1st Pull of Undergrad programs that start with the letter "E" (RG 020236)

> BCOMM Graduation and Limiting Requirements (RG 060282)

> Max Major/Minor Field Course Units - ARBCH programs(RG 021057)

> Max Extra Major/Minor Field Course Units - ARBCH programs (RG 021058)

> BCOMM Unused Courses Exceeding Limiting Requirements (RG 060251) Hidden

> BCOMM Course Requirements (RG 060317)

> English Minor (RG 022870)

> BCOMM Summary of Applied Courses (RG 060246)

> BCOMM Unused Courses (RG 060250)

33.   If desired, you may view the report in a .pdf format by clicking on the View Report as PDF at the top
        of the report. Note this may take a few seconds. Ensure your popup blocker is turned off.
        Click the **View Report as PDF** button.

View Report as PDF

34.   The .PDF document displays. Note the simplicity of the view. Note the length of the document (e.g.
        1 of 9) however, this can vary in length depending on the student's academic program. Note: For
        FOIP reasons some information has been removed.

35.   The .PDF report displays the requirement groups in colour (e.g. Not Satisfied/Satisfied).

English Minor (RQ 000027458)
Not Satisfied: Minor Program Requirements

Students must successfully complete at least 30 units and not more than 36 units from the field of English, including at least 18 units labelled English at the 300 level and above.

- **Units**: 30.00 required, 24.00 used, 6.00 needed

Foundation Program
Satisfied : Min 6 units from ENGL302 OR
6 units from ENGL303, ENGL426, ENGL481, ENGL515, ENGL517

- **Units**: 6.00 required, 6.00 used

Courses Used

Term	Subject	Catalog Nbr	Course Title	Grade	Units	Type
W18	ENGL	302B	Intro Contemporary Theory		6.00	IP

Foundation Program
Satisfied : Min 6 units from ENGL340 (discontinued)
OR ENGL305, ENGL307

- **Units**: 6.00 required, 6.00 used

Courses Used

Term	Subject	Catalog Nbr	Course Title	Grade	Units	Type
W17	ENGL	340B	Lit in Engl Middle Ages Pres		6.00	EN

ENGL205, ENGL311
Not Satisfied: Min 3 units from ENGL205, ENGL311

- **Units**: 3.00 required, 0.00 used, 3.00 needed

Field of English
Not Satisfied: Min 15 units from the field of English

- **Units**: 15.00 required, 12.00 used, 3.00 needed

Courses Used

Set up Screens for Advising Functions
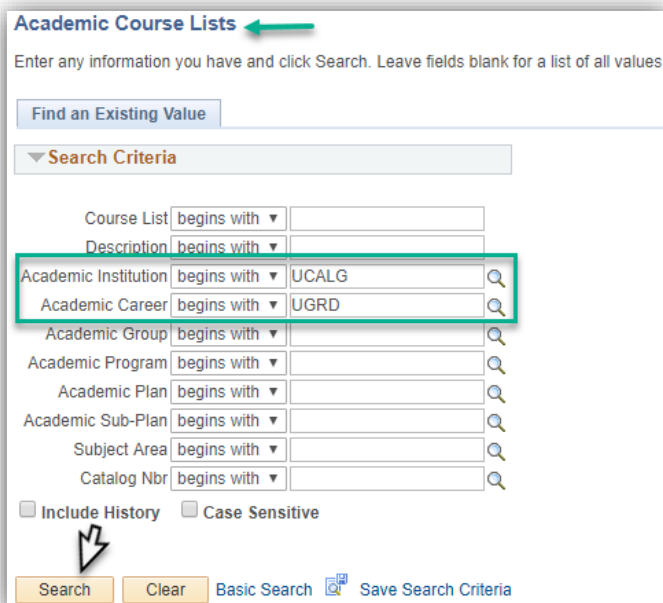
Maintaining Area Course Lists - Academic Advising Summary Screen

The Student Record Summary page in the Academic Advising Summary component arranges a student's courses into different areas. Each of these areas is pre-defined on a faculty-by-faculty basis, through the use of course lists. One list is created for each area and then 'attached' to that area; it is also possible to define the priority each area has in terms of which area a course should be placed in if it matches the criteria for more than one area.

Review Course Lists

Navigation: **Academic Advisement > Summaries > Academic Course Lists**

1. Each faculty already has course lists defined for the **Advising Areas** and these are maintained centrally. You can view the courses on the lists for your faculty and request any required changes through a Service Now request.
    Note: It is, of course, critically important that you only request modifications to the lists that affect your own faculty.

2. There are many course lists which are used in several different ways. To retrieve those that are used for the Advising Summary, it is important to include the Academic Career in your search to narrow the results returned.

3. Select the desired list and click on it.

4. The **Course List Summary** displays the effective date. Be aware there can be more than one version of the list, with different effective dates. When requesting changes to a list, it is important to specify whether you want your changes to apply retroactively or whether the change should take effect only as of a particular point in time.

5. Click the **Fetch** button to retrieve the existing course list.
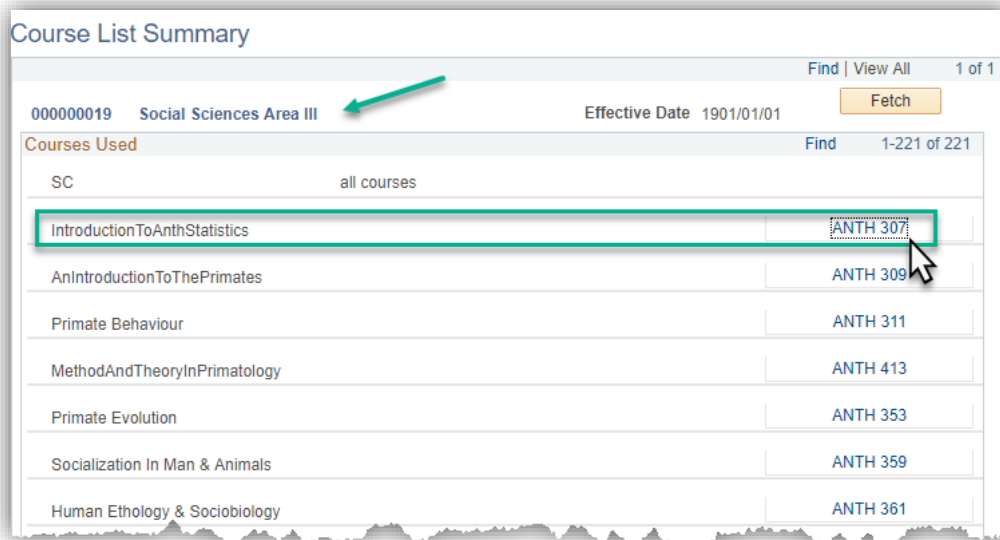
6. There are two modes for entering courses into a **Course List**. By **Course ID** or by using the **WildCard Indicator**.

    If a course has been entered by **Course ID**, and there is more than one version of the course, you can check to see that the version you want is included by clicking on the link to the course to note the course id and course description.

If the course was entered using the **WildCard Indicator** you will see just the faculty, subject, or subject and catalog number. If you see nothing, then the list includes all courses offered at the U of C.

Note:

As course lists grow in length, the response time in retrieving them reduces. Please be aware all these definitions apply to <u>all</u> students in the faculty regardless of program, so they must be universal in nature.

Define Academic Summary Areas
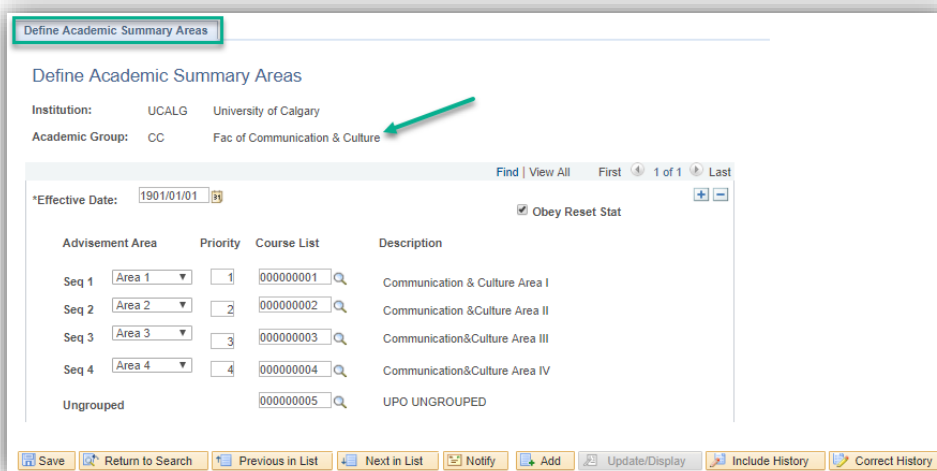
Navigation: **Academic Advisement > Advising Setup > Define Academic Summary Areas**

This set up table allows you to determine the following:

- which **course list** is associated with each area on the Advising Summary for a particular faculty
- the **priority** each area has in terms of course assignment
- whether or not the advising summary will **obey reset stats** for students in your faculty. (I.e., if you do not want the advising screens to obey reset, then you will see all the courses the student has ever completed, regardless of how many degrees they have received, in the advising pages. If you select the obey reset stat check box, you will only see those courses the student has completed or registered in since the completion of their last degree at U of C.)

1. Enter the two-letter code for your faculty in the search criteria and click **Search**.

    In the example below you can see that course Communication & Culture Area 1 has been assigned to Area I, course list Communication & Culture Area 2 has been assigned to Area II, etc. However, when the system is determining which area a course should go into, it looks first to see if it matches Area I, then Area 3, then Area 2 and finally Area 4. This gives you the control you need to ensure that a more specific area (like a specific list of just a few CC courses) is considered before a more general requirement (like a list including ALL **CC** courses). This saves considerable labour; in this example it was not necessary to list all non Area 3 CC courses in the list for Area 2. The 'ungrouped' area is always considered last.

Note:

This set-up can be modified by the senior advisor in each faculty. Note that the record is effective dated.
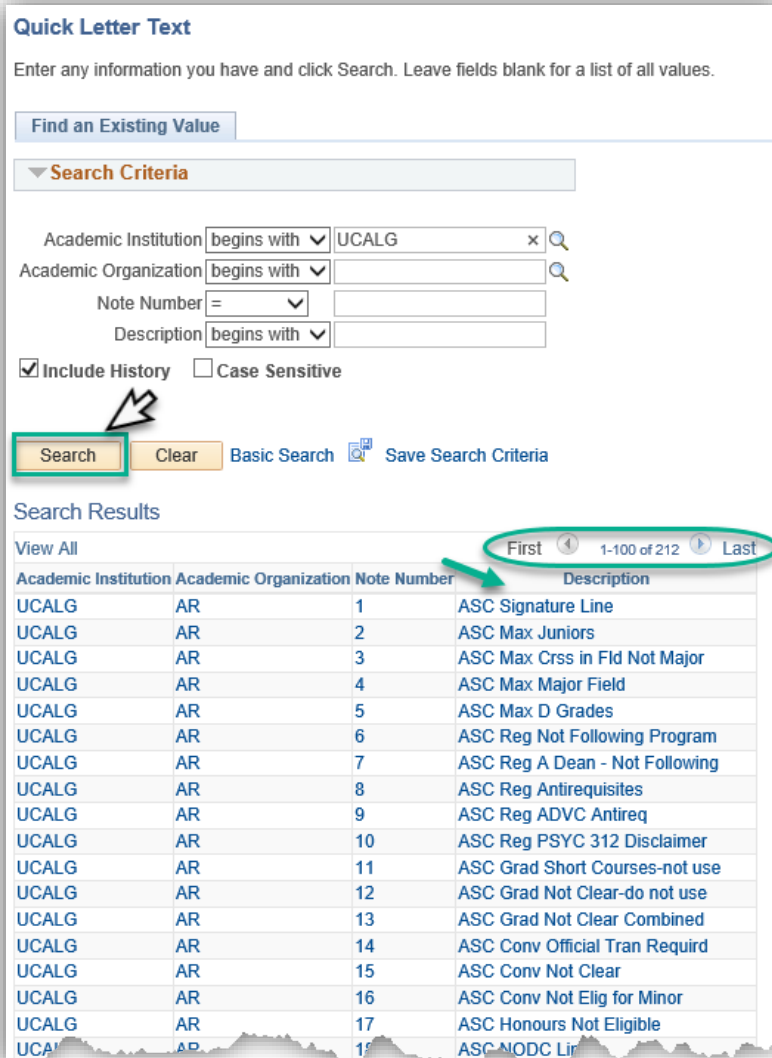
Quick Letter Text Templates

Navigation: **Campus Community >Communications >Quick Letters >Quick Letter Text**

This screen enables you to enter and save commonly used blocks of text for use in Quick Letters. *Caution: Please only edit blocks of text used by your office.*

1. Begin by clicking the **Search** button to see the text templates that have already been created and to make note of the conventions used in the **Description** field.

Quick Letter Text

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

Find an Existing Value

▼ **Search Criteria**

Academic Institution	begins with ▾	UCALG ✕ 🔍
Academic Organization	begins with ▾	🔍
Note Number	= ▾	
Description	begins with ▾	

☑ Include History   ☐ Case Sensitive

[Search]   [Clear]   Basic Search   🔲 Save Search Criteria

Search Results

View All   First ◀ 1-100 of 212 ▶ Last

Academic Institution	Academic Organization	Note Number	Description
UCALG	AR	1	ASC Signature Line
UCALG	AR	2	ASC Max Juniors
UCALG	AR	3	ASC Max Crss in Fld Not Major
UCALG	AR	4	ASC Max Major Field
UCALG	AR	5	ASC Max D Grades
UCALG	AR	6	ASC Reg Not Following Program
UCALG	AR	7	ASC Reg A Dean - Not Following
UCALG	AR	8	ASC Reg Antirequisites
UCALG	AR	9	ASC Reg ADVC Antireq
UCALG	AR	10	ASC Reg PSYC 312 Disclaimer
UCALG	AR	11	ASC Grad Short Courses-not use
UCALG	AR	12	ASC Grad Not Clear-do not use
UCALG	AR	13	ASC Grad Not Clear Combined
UCALG	AR	14	ASC Conv Official Tran Requird
UCALG	AR	15	ASC Conv Not Clear
UCALG	AR	16	ASC Conv Not Elig for Minor
UCALG	AR	17	ASC Honours Not Eligible
UCAL	AR	1	ASC NODC Li
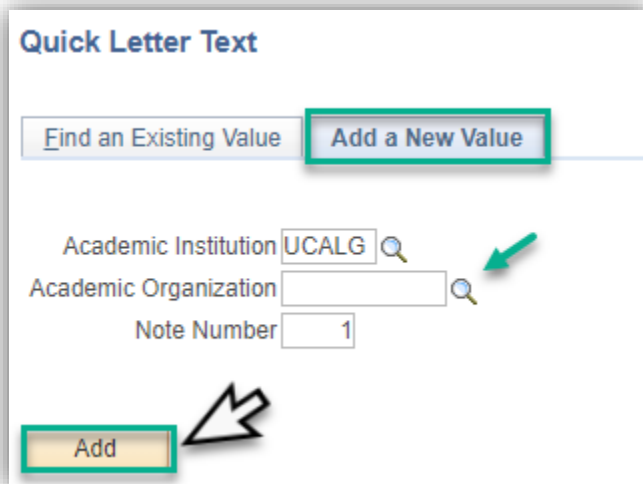
Note:

If you wish to use the Quick Letter functionality and have not previously created Quick Letter templates, some pre set-up is required. Submit a Service Now request for assistance with the pre set-up.

Text templates set up uses a specific department identifier at the beginning of each description which allows for easier management, sorting and identifies the department responsible for the block of text.

WARNING: Text blocks are editable by all users; therefore please do not modify a block of text setup by another department. Please do not change any "all user text" such as the Letter of Permission. This feature is used by all and the **text templates prefaced with LOP should never be changed**.

2. To add your own text template click on **Add a New Value** tab. Enter your unit's designation in **Academic Organization**.

3. Then click **Add**.

4. Enter the **Effective Date** you want and make the **Status** 'Active'. Enter a description using the conventions noted above.

5. Enter the text you want in the **Text** field.

6. Click **Save**.
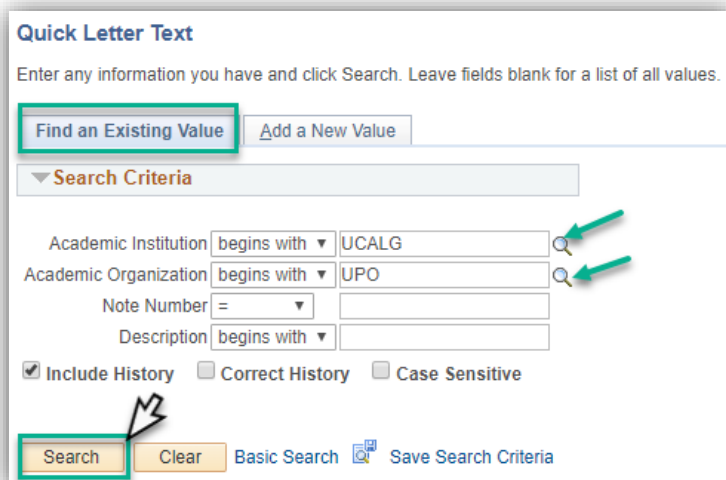
7. It is recommended to use the **Text** in a Quick Letter to confirm the clarity.

Use these steps to **modify** one of your existing text templates:

8. On the **Find an Existing Value** page enter the appropriate **Academic Organization** and then click the **Search** button.

9. In the **Search Results** click on the desired **Description** link for the Quick Letter Text you wish to modify.

The Quick Letter Text page will display.

10. Click **Correct History** **if your changes are to be retroactive**.

11. Use the **plus sign** to add a new effective dated row for changes that will take effect at a certain point in time.

12. Make desired changes and then click **Save**.

Credit for After Degree Students

Re-setting of Cumulative Statistics

PeopleSoft automatically keeps track of a number of statistics for each student, both term by term and on a cumulative basis. These totals are displayed on the Term History component (*Records and Enrollment > Student Term Information > Term History*).

One of the totals it tracks is the total number of courses a student has completed and this total is used to automatically determine the students 'level' (year of program).

The first time a student registers in further courses, after completing a degree at U of C, these 'cumulative statistics' are re-set to 0 and the system starts over, tracking the courses the student takes from that point on.

The resetting of the stats can cause issues for advisors when dealing with students doing a second or subsequent degree. Most faculties do not require such students to complete 20 full courses in the second degree. A certain number of courses from the first degree are applied to requirements for the second degree, and the student's level reflects that fact. At the same time, not ALL the courses from the first degree can be used toward the second. For purposes of degree audit, therefore, we need the following:

- Some means of correcting the level for an After degree student
- Some means of indicating which courses from the first degree are used toward the second or which are not.

The latter can be accomplished either by assuming that all courses from the first degree count toward the second unless otherwise specified (i.e., ignore the 'reset' of the cum stats), or by assuming that none of the courses from the first degree count toward the second unless otherwise specified (i.e., do not ignore the 'reset' of the cum stats).

Each faculty will have different factors that determine which approach is most efficient. The decision as to which approach to use is complicated by how **Repeats** and the **Extra to Degree Designation** operate in PeopleSoft:

Repeats

When a course appears on a student's record more than once, PS determines what the repeat code should be for each instance of the course and only one instance is counted in the cumulative statistics. Therefore, if you wish to use a course that was already used in a prior degree, you cannot create a credit for that course for use in the new degree. PS will see the same course in the first degree as a 'LOW' repeat and will ***remove it from the cum stats for the first degree***. *This will actually change the student's level in the first degree – their transcript results may indicate having graduated as a year two or three student, depending on how many credits from the first degree you duplicate as credit.* ***Warning: This must never be completed.***

XTRA to degree designation

PeopleSoft has no concept of a course being 'extra to degree' for one program, but not another. Whether the course is part of a degree that has already been completed, or part of a new program, the XTRA indicator can only be 'on' or 'off'.

Because of this, if you want to use a course that was made XTRA to a previous degree, *you cannot remove the XTRA designation – if you do the course will no longer be extra to the first degree. Similarly, you cannot make courses that were used in the first degree XTRA if you do not want them used in the second degree – as this actually makes them XTRA to the first degree as well.*

Note:
These problems with respect to courses from the first degree affect degree audit, but do not affect registration. PS will continue to use courses from the student's entire record for prerequisite purposes, regardless of the reset of cum stats.

Student Record Summary in Advisement and the Cum Reset

The Academic Advising Summary component were designed specifically for U of C. It was therefore possible to build in a setting to allow each faculty to determine whether they want these tools to 'obey the cum reset' (and use no courses from the first degree toward the second) or to 'not obey the cum reset' (and use all courses from the first degree toward the second).

The pros and cons to each approach are as follows:

Obey Reset Stat

You (and the student) will see only the courses the student has taken since completing their first (or most recent) U of C degree, in the Student Record Summary Screen (***Note***: *the student's entire record can still be seen on the 'Full Course History' tab in the Academic Advising Summary component*).

PROS: This makes it easy for staff to see at a glance just those courses taken within the second degree and lowers the risk that too many courses from the first degree will be accidentally used. Staff will not have to mark all the courses from the first degree that cannot be used toward the second. *This is a good option when there is overlap between the first and second degrees.*

CONS: any courses from the first degree that you WANT to use in the second require special handling so they can be used without being seen as **repeats** by PS. This is also true of courses that were **XTRA** to the first degree.

Do not Obey Reset Stat
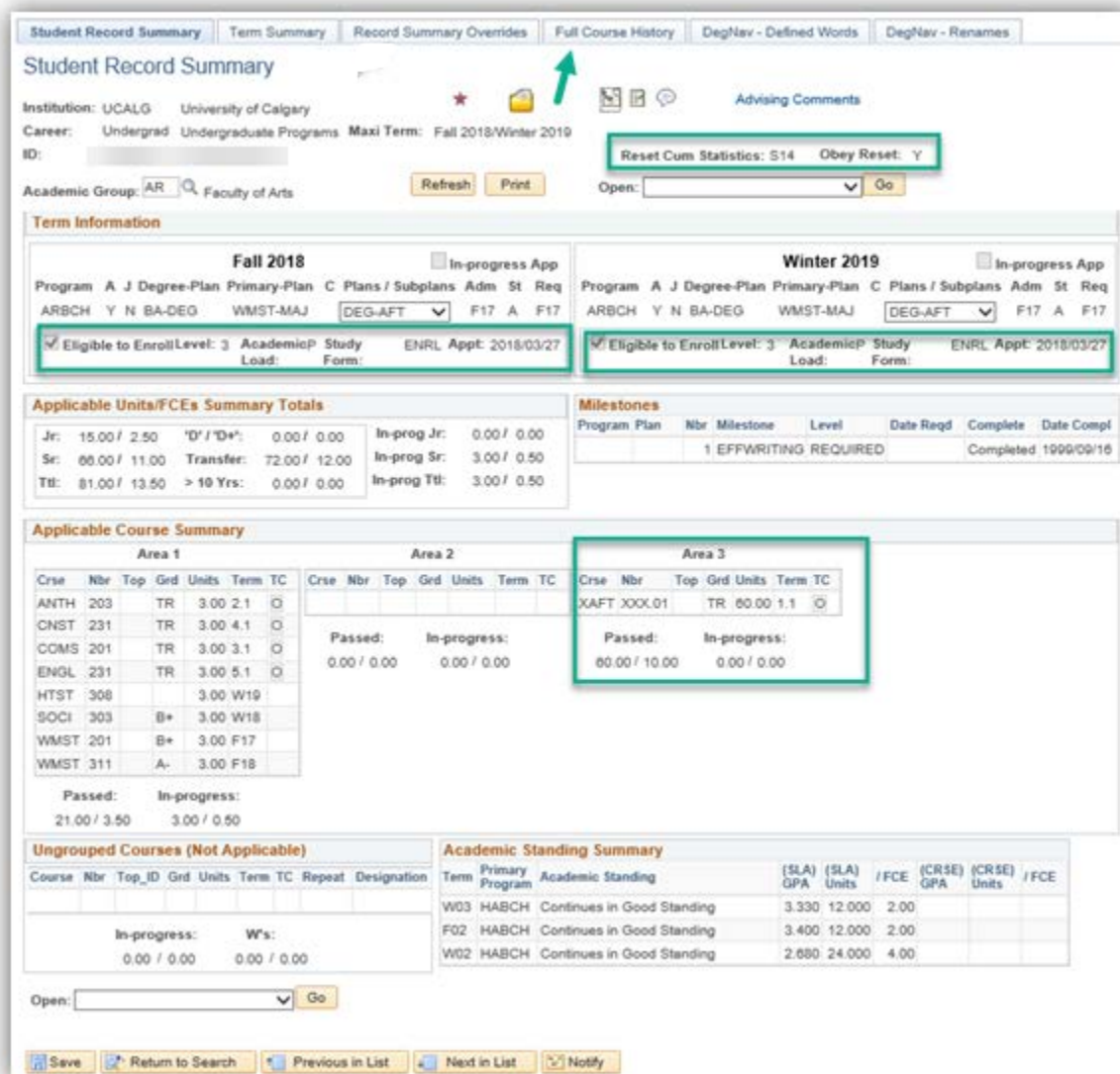
You and the student will see ALL the courses the student has ever completed, as well as the transfer credits assessed for their first degree on the Student Record Summary Screen.

PROS: This makes it easy for staff and students to see at a glance all the courses from the first degree that could potentially meet requirements in the second degree. No special handling is necessary to recognize credit from the first degree in the second (although special handling is still required to use courses that were XTRA to the first degree).

CONS: Credit from the first degree is used toward the second whether you want it to or not – it could therefore require some effort to make sure that inappropriate credits are not used toward the second degree – and they **cannot be made XTRA to degree**, so special handling is required.

Special Handling of Courses from First Degree used in Second for Faculties who 'Obey Cum Reset'

If your faculty has chosen to have 'obey cum reset' set to 'Yes' for the Student Record Summary, you will see the following on the advising summary screen.

The **Obey Reset** field will contain a **Y**.

If you are looking at an 'After degree' student, you will see a term (S14) in the 'Reset Cum Statistics' field. This term is the first term courses were taken after the first degree was completed.

In the example above, only the courses taken from F17 onward will be displayed on the screen, but all the courses the student has taken can be viewed by going to the **Full Course History** tab.

In the example above, the student only has 4 full courses since S14 – however, note that her **Level** is '3'. This is because they are entitled to use 10 FCE from the first degree toward the second – and an 'O' type credit with the name 'XAFT' worth 60 units has therefore been added to her record.

Creating XAFT Credit to 'Carry Forward' Courses from the First Degree

Once you've determined how much credit a student will get from their first degree, an 'O' type credit can be created to represent that credit in the second degree. *Use this same technique to make courses XTRA to the first degree usable in the second degree.*

1. Navigate to **Other Credit Manual** and Add and post the amount of XAFT Credit you need

2. When setting up the credit, make sure that the **Other Credit Type** is set to **After Deg**. This is necessary to ensure that the credit is not included on the official transcript.

(Whether you have a single credit worth the full amount of the credit, or divide it into a number of smaller credits – ex., XAFT XXX.01, XAFT XXX.02, etc. – will depend on how you want to arrange it on the Advising Summary screen. It will default into one area, but can be overridden into another area if desired).

Navigation: **Records and Enrollment > Transfer Credit Evaluation > Other Credits - Manual**

Notes:

You cannot create a credit with the same course name/number as the course from the first degree, as this will cause the problem with **Repeats** as noted.

Using a standard format for the 'hidden' credit you must create signals to all users what the nature and purpose of the credit is.

Special Handling of Courses from First Degree Not used in Second for Faculties who do not 'Obey Cum Reset'

When a faculty has decided not to have the Student Record Summary 'obey reset' then the value in the 'Obey Reset' field will be set to 'N'.

The Cumulative statistics still have to be reset, however, despite the fact that all the students' courses are displayed on this screen. Therefore, the term at which the reset occurred is still displayed and **the level of program will include only those courses taken since the reset**.

Getting the Correct Level of Program

To correct the level (if necessary) you must create enough XAFT credit (as described above) to bring the level to the correct point.

Using Courses that were XTRA to the First Degree

You cannot remove the XTRA designation from courses that were made extra to the first degree, as this will alter the transcript and the definition of the first degree. You must therefore create and re-name XAFT credit, as described above, in order for those courses to be used by the Advising Summary.

Preventing Courses from the First Degree from being used in the Second Degree

With 'Obey Reset' set to 'No', the Student Record Summary screen will use all the courses a student has completed, as long as they have not been designated XTRA.   If there are certain courses you do not want used, you must do the following *(remember that you cannot make the courses XTRA as that will remove them from the first degree as well):*

Student Record Summary

Navigation: Academic Advisement > Academic Advising Summary

To prevent the course from being displayed in the 'for credit' areas of the Student Record Summary, use the '**Record Summary Overrides'** tab to move the course into the '**Ungrouped'** area. The course will then no longer appear with those being used toward the degree.

Updating Repeat Codes for courses taken at the U of C

In general, repeat codes should be assigned correctly by the system during the batch Repeat Check process which runs at the end of each term once final grades have been posted for all courses.

The following chart summarizes what the Repeat Check entails and the results, which are expected from the process:

	Grade	*on Enrolment	Round	Round	Round
			1	2	3
First Attempt	(C)		LOW	LOW	LOW
Second Attempt	(B)		HIGH	LOW	LOW
Third Attempt	(A+)	OVRD		OHGH	HIGH
Fourth Attempt	(A)	OVRD			OLOW

Students cannot enrol into a third or subsequent attempt of the same course unless an "override" approval is granted. This OVRD repeat codes tells the system, at the time of enrolment, that the repeat attempt has been approved. The Low/High codes are assigned when final grades are present for each attempt. (I.e. at the end of each term)

There are circumstances when the codes might not get assigned correctly and, if that occurs, staff members in Faculty offices and Student and Enrolment Services now have the necessary access within their Enrollment Access ID setup to make corrections to Repeat Codes. An Enrollment Request component can be used to add, change or delete Repeat Codes from the enrollment record related to a specific class in a specific term.
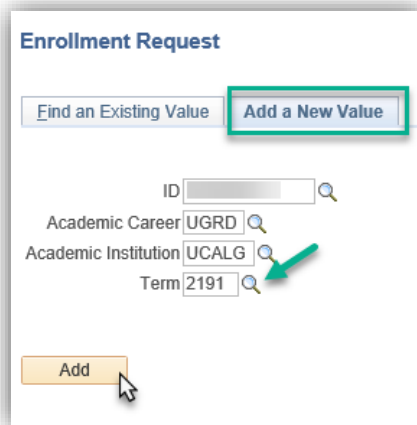
Situations that require manual correction will be reported on the Repeated Course Report *(included in this document)* which can be run for a term and for a specific faculty. When an error situation is reported for a student, it may involve one or more of the attempts for the same course.

The following steps will need to be followed for EACH instance of the course where a repeat code needs to be corrected. Corrections are made on the enrolment record for each individual class.

1. Create a new **Enrollment Request** (**Quick Enroll** may be used instead) for a student.

   Navigation: **Records and Enrollment > Enroll Students > Enrollment Request**

2. Use the **Term** where the course attempt occurred that now needs to have a Repeat Code added, changed or deleted.
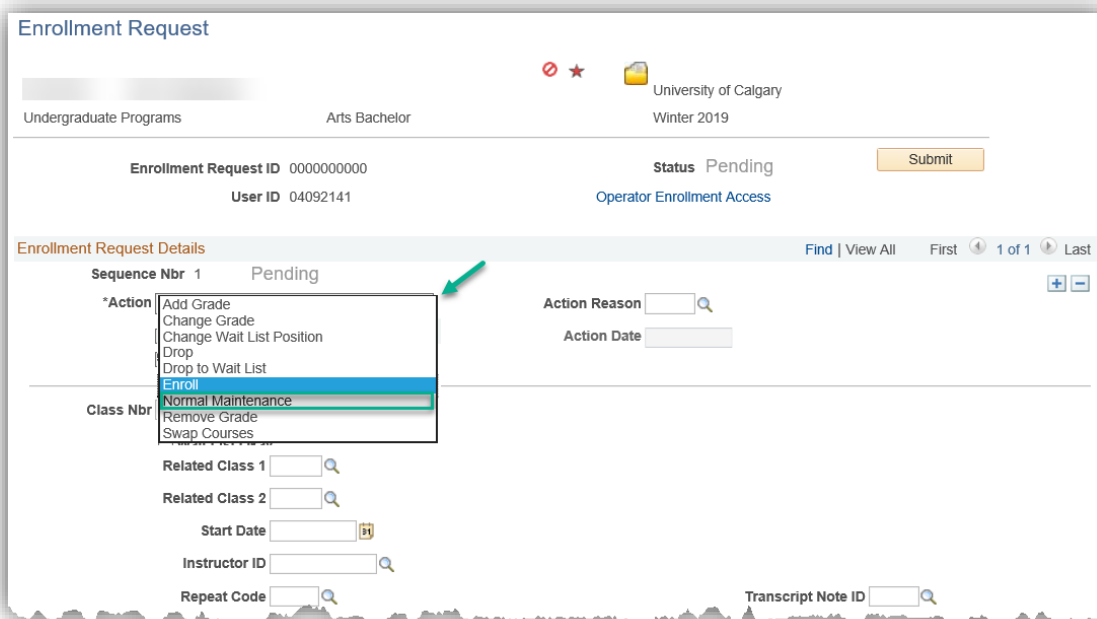
3. Select the **Action** of "**Normal Maintenance**"

4. Use the **Class Nbr** lookup to find the enrollment record for the course to be updated.

5. Select the course that you want by clicking the **checkmark**.

6. Once the information for the course is pulled onto the page you'll be able to see any existing grade and **Repeat Code**. You will notice that the **Repeat Code** field is now editable.

Add a **Repeat Code** by typing it in or selecting it from the lookup page.

5. Then **Submit** the transaction as with any enrollment transaction. The code now becomes part of the enrollment record for the class.

You can use the same method to change a code.

6. Deletions can be done by entering the **Repeat Code** field and selecting the existing code.

7. Click the **minus sign** and then **Submit** the transaction. This will remove the code from the enrollment record for the class.

It is recommended to review Repeat Codes on a student's Academic Advising Summary – Full Course History page.

Navigation: **Academic Advisement > Academic Advising Summary > Full Course History**

Tips on Selecting the Correct Repeat Code when correcting an error

1. If there are only 2 attempts of the same course, the one with the higher grade should have the code HIGH and the one with the lower grade should have the code LOW.

    NOTE: The HIGH or OHGH code denotes the one attempt of all the repeats that will earn credit toward completion of a program. Each course group should have only one or the other of these codes present within that group of attempts.

2. If the 3rd attempt has the error code of REPT it will be necessary to look at all 3 attempts to determine how to correct the codes. A 3rd or subsequent attempt should be assessed in comparison with the highest of the previous attempts – in other words, check which attempt currently has the code of "HIGH" and make the following correction(s):

1ST example: -

	Grade	Repeat Code	Required Changes	Corrected Codes
First Attempt	(C)	LOW	Ok – no change	LOW
Second Attempt	(B)	HIGH	LOW	LOW
Third Attempt	(A+)	REPT	OHGH[1]	**OHGH[2]**

2nd example: -

	Grade	Repeat Code	Required Changes	Corrected Codes
First Attempt	(C)	LOW	Ok – no change	LOW
Second Attempt	(B)	HIGH	Ok – no change	**HIGH^2**
Third Attempt	(C+)	REPT	OLOW^1	OLOW

Examples of multiple attempts: -

	Grade	Repeat Code	Required Changes	Corrected Codes
First Attempt	(C)	LOW	Ok – no change	LOW
Second Attempt	(B)	LOW	Ok – no change	LOW
Third Attempt	(A+)	OHGH	Ok – no change	**OHGH^2**
Fourth Attempt	(A)	REPT	OLOW	OLOW

Or

	Grade	Repeat Code	Required Changes	Corrected Codes
First Attempt	(C)	LOW	Ok – no change	LOW
Second Attempt	(B)	LOW	Ok – no change	LOW
Third Attempt	(B+)	OHGH	OLOW	OLOW
Fourth Attempt	(C+)	OLOW	Ok – no change	OLOW
Fifth Attempt	(A)	REPT	OHGH	**OHGH^2**

Notes:

OHGH or OLOW must be used to indicate that a higher/lower grade has been earned during a third or subsequent attempt in the same course. After two attempts have been made, subsequent attempts require special approval. The system will return the following error message if a staff member attempts to assign the HIGH or LOW code to a third or subsequent repeat attempt:

▼ Error Messages		
Message Sequence: 1	**Severity:** Error	**Last Update DateTime:** 08/05/27 15:12:00
Course previously taken. Enrollment not allowed. (14640,173)		
The repeatable limit for any given course, as established by the Institution's Repeat Rules, has been exceeded. Enrollment beyond this limit is not allowed without permission.		

Only one of the attempts will have either the HIGH or OHGH code within any group of repeated attempts for the same course. When these codes are assigned correctly by the batch process, they will be assigned to the attempt with the highest grade – or the most recent attempt that shares the highest grade. These codes indicate to the system that the noted attempt will be assigned credit. When LOW or OLOW is assigned to an attempt, it does not earn credit but it will be calculated in the term GPA within the term in which it was taken and completed. Therefore, for any one course there should only be one HIGH-type code and all other attempts must have a LOW-type code. If more than one attempt is earning credit, the situation will be reported on the Repeated Course Report for investigation.
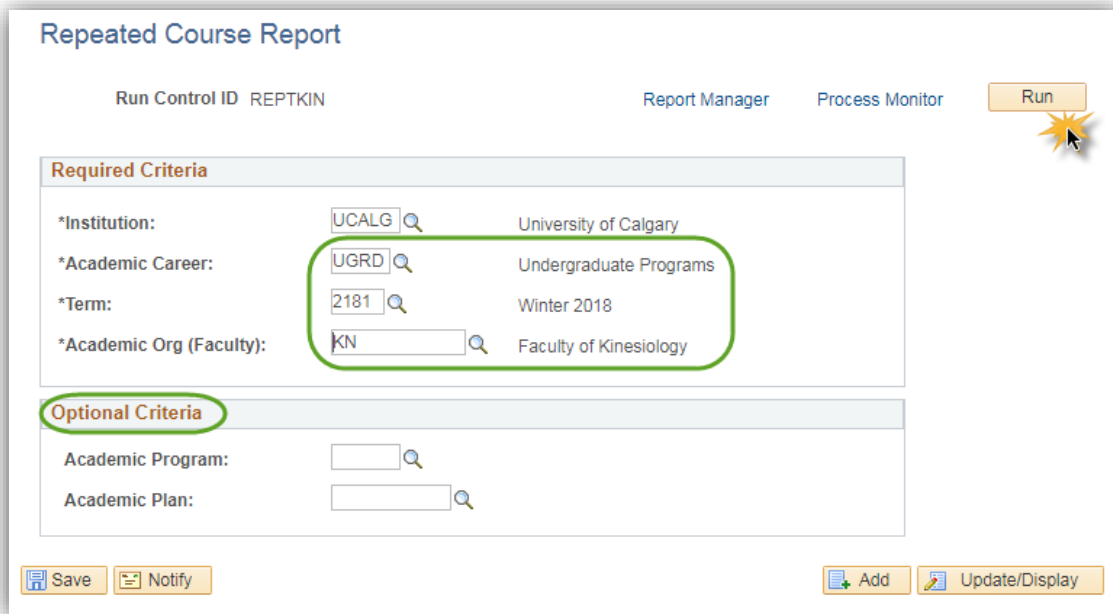
Identifying Repeat Code problems for students

Repeated Course Report

A Repeated Course Report can be obtained at the end of a term to determine whether any students have been assigned the REPT Repeat Code or have codes assigned incorrectly so that they are earning credit for more than one attempt of the same course.

Navigation: **Records and Enrollment > Term Processing > End of Term Processing > Repeated Course Report**

Run Control IDs are associated to your UserID and will be saved by the system and available for future use when you search for an Existing Run Control.

1. Specify the **Required Criteria** to describe the **Academic Org (Faculty)** and **Term** for which the report will be run (e.g. 2181 Winter 2018 and KN Faculty of Kinesiology).

2. The output of the report can be obtained in smaller groupings by using the optional **Academic Program** and **Academic Plan** options.

   Ensure you specify a <u>valid</u> Program/Plan combination or the process may not be able to find any records to match your selection criteria.

The report output provides the following information for each attempt of a course for which a Repeat Code issue is being reported:

Student ID

Equivalent Course ID (if relevant)

Course ID

Term (in which the specific instance of the course occurs)

Subject

Catalog Nbr

Class Section*

Grade

Repeat Code

Note that the section number will be present for courses completed at the U of C. If the attempt is actually a transfer credit on the student's record, the section number is replaced by the term "CRSE" as in the illustration below:

Student #1: situation is that the incorrect course is coming up as "HIGH" (i.e. the lower of the 2 passing grades; 2171 should indicate HIGH).

Student #2: The course has a "REPT" code which indicates that no valid repeat code could be determined by the system for this course and that a repeat code must be determined and added manually.

It is important to view the student's entire record to determine how best to proceed with the correction of the records. In general, codes assigned to courses taken at the U of C can be amended by staff using an Enrollment Request transaction. Codes associated with courses coming into the record as transfer credits are amended by un-posting and re-posting the transfer credit model which contains each instance of the course. Sometimes more than one attempt is recorded within the same model. Sometimes they are spread across multiple models and terms. When the problem occurs on a transfer credit, please contact the Admissions Office.

The **Term** shown in the report is the term in which the course was taken or to which the transfer credit model was articulated.
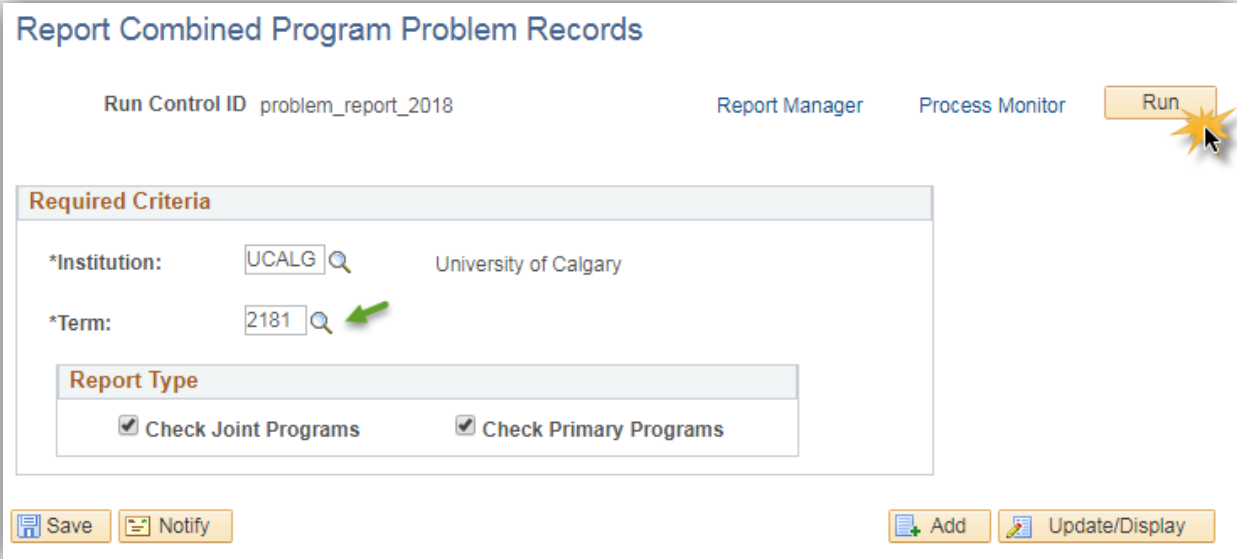
Combined Degree Problem Report

In PeopleSoft, the two elements of a combined degree program are linked only by the joint program flag. PeopleSoft will allow a student to be in multiple programs which are not joint programs at the same time. It therefore does not enforce the U of C's policies regarding combined degrees as effectively and a number of errors in program definition can occur as a result.

The Combined Degree Problem Report has been designed to identify improperly defined programs so they can be corrected. You will need to periodically run this report and find the students in your programs that you can fix (primary program = your faculty and admit type = CF3).

Navigation: **Records and Enrollment > Career and Program Information > Combined Program Problem Rpt**

Run the following run control:

The report output includes:

The student's **primary Faculty**

The **admission type**

One line per program if there is more than one

The Report Section Headings are as follows:

- One Program with Joint Program Flag Indicated - No Outstanding Admission Applications
- One Program with Joint Program Flag Indicated - With Outstanding Admission Applications
- Two Programs with Joint Program Flag Not Indicated
- Missing Primary Student Career Number

Use the Program **Plan Summary** screen to determine the exact nature of the problem and how to correct it.

Trouble-Shooting the Program and Plan Summary

By using the **Program and Plan Summary** it enables you to diagnose the problems with a student's program (e.g. registered in too many program, etc.).

Navigation: **Records and Enrollment > Career and Program Information > Program and Plan Summary**

> Or
> Select **Program/Plan Summary** from the **Open** list on the Academic Advising Summary or the Student Status screen.

The large outlined numbers (1-5) at the top of the figure (above) are used for reference purposes in the trouble-shooting steps outlined on the next page.

- **Student Car Term - 1** (from figure)
  Begin here. Under the **Term** column, there will be one student career term listed per career. The career is indicated by the letter following the term (G = graduate, M = medicine, U = undergraduate). In the above example, the student has two student career term records for W08, one for graduate and one for medicine.

- **Career Number - 2** (from figure)
  Each program on a student's record has a unique **Career Number** (the first program created for a student will be **Car# 0**, the next one will be **Car# 1**, etc.). This field displays the number after a letter indicating the career of the program. In the above example, the student's medicine program is **Car# 1** and their graduate program is **Car# 0**. The **Car#** is essential for finding the correct record when using the **Student Program/Plan** component (the best way to use that component without errors is to get there by clicking on the link in the **Prog** field that corresponds with the appropriate Car #).

- **Joint Degree Indicator - 3** (from figure)
  The **Joint Degree Indicator** flag (**Jnt**) indicates whether the program is part of a joint degree or not. Use this flag in conjunction with the **Primary Program Indicator** (**Pri**) to determine if the number of active programs is correct and if the correct program is attached to the term on the **Term Activation** page.

- **Primary Program Indicator - 4** (from figure)
  There will be one of four values in the **Primary Program Indicator** (**Pri**) field:
    - P = this is the Primary program for this student career term. **There must always be one and never more than one Primary program for a student career term**.
    - S = (Secondary) any non-primary program for the same student career term and career as the Primary
    - D = any non-primary program for the same student career term and a **Different** career from the Primary. (**Note**:   this value should only appear on terms prior to Spring 2003 on Grad and Med Careers).
    - blank = when there is no active program for a student career term. (See screen shot and notes below).

- **Eligible to Enrol Flag - 5** (from figure)
  Normally, a student should be eligible to enroll in only one career per term (correct errors on the Term Activation page). An 'eligible to enrol' flag of N or blank is added to the value in the '**Load'** column (which contains a value to indicate the student's registration status for the term)as follows:

    - **Blank** = indicates that the student **is** eligible to enrol in this program for this term
    - **N** = indicates that the student **is NOT** eligible to enrol in this program for this term

How to identify problems:

1. For each **Student Car Term**, ensure that there is exactly 1 active program that is marked **Primary (P).**

2. If there is more than one program, ensure that the joint flag is set to Yes (**Y**), that one of the programs is marked Primary and the other Secondary and that there are no more than two programs.

3. If neither #1 nor #2 is true, you will have to investigate to see if any of the active programs should have been discontinued. When the student was admitted to their latest program, in most cases all previous programs should have been cancelled. Check the **Car#** to see if a program from prior to the admit is still active (ex., in the screen shot you can see that the student has an application for Fall 2007. The active program prior to F07 is **Car# M-1**. If the Fall 2007 application had been matriculated, and M-1 was still active for F07 and beyond, that would indicate a potential problem).

   If the previous program is still active:

   a. Check the Student Program/Plan to see if the previous program was **cancelled**, but with the **wrong effective date**.

   b. Check the status of the new program, as another possibility is that a failed attempt was made to cancel the application to the new program. If the status is **CN**, follow-up to make sure the program is properly cancelled.

   c. If the student is graduating, check to see **if the effective date for degree completion is wrong**, leaving the student active in a term beyond the expected grad term. (It should be the first of the term following the expected grad term, as the student is graduating at the END of the expected grad term and the program must therefore be completed at the end of that term.

4. If you see a line (as in the example below) where the primary program indicator is blank (**indicating that there is no active program for that term**) and the student is registered, there is a mistake. (For example, if a student registers for Spring/Summer and is then awarded their degree in June, they will have no active program and their registration is 'orphaned'. They must be admitted to Open Studies). A value has been added to the status column for cancelled or dismissed programs to help identify problems.

5. If the student has applied for their degree, but you do not see their degree checkout status in the **DG** column, this indicates that there is no student car term for the expected grad term. The expected grad term could be wrong; therefore this should be investigated.

Program and Plan Summary

☑ Display canceled program status data rows.

Customize | Find | 🎞   First ◄ 1-33 of 33 ► Last

Term	Appl Nbr	Prg#	Chc	Car#	Jnt	Pri	Prog	Degree	Aft	Plan	R	DG	Lvl	Load	Type	Adm St	Prg St	Reason	COI	Standing
0981	40043943	0	1		N		NDNDU	UNCL-DEG					O		OSN	A	AC			
0981-U				U-0	N	P	NDNDU	UNCL-DEG					O	P						
0987-U				U-0	N	P	NDNDU	UNCL-DEG						N						
2057	40043946	0	1		N		SCBCH	BSC-DEG		CPSC-MAJ			3		TRN	A	AC			
2057	40043946	1	2		N		SCBCH	BSC-DEG		PHYS-MAJ			3		TRN		CN			
2057-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ			3	F						
2061-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ			3	F						PROE
2063-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ			3	F						
2065-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ			3	P						
2067-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ			4	F						
2071-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ			4	F						APLA
2073-U				U-2			SCBCH	BSC-DEG		CPSC-MAJ			4	N-N			DM			
2075-U				U-2			SCBCH	BSC-DEG		CPSC-MAJ			4	N-N			DM			
2077-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ			4	F						
2081-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ		DN	5	F						PROE
2083-U				U-2	N	P	SCBCH	BSC-DEG		CPSC-MAJ			5	N						

Notes on Dates:

To determine if a program has been cancelled, completed, discontinued, etc. using the correct date, remember that the only time two programs can be active at the same time, is when the student is in a combined degree. If one program ends at the end of one term and the next begins at the beginning of the next term, they should actually begin and end on the same date so that there is no gap and no overlap between the programs.

Revoking Admission (Change of Program) – WADM

Entering a row on the **Student Program/Plan** screen with a program action of WADM cancels the program associated with that student career number.   It will also IN SOME CIRCUMSTANCES revoke the admission to that program as follows:

The effective date must always be the first day of the start of a term, and the cancellation will occur as-of that date. If there is no corresponding admission record for the term entered, then this effectively means that the program ceased to be 'active' at the end of the prior term.

If the program being cancelled, however, is one that the student was admitted to for that term, then the cancellation is deemed to be occurring at the beginning of that term and the program on the Admission record is also cancelled.

For example, student is admitted to ARBCH – HIST for F18. If you put a WADM on that program dated 2018/09/01 the program will be cancelled AND the admission revoked, and the system considers that the student was not in HIST for F18. However, if you put the WADM row up dated 2019/01/01, then the program is cancelled and the admission is not revoked and the system sees the student as being in HIST for F18, but not for W91.

To 'revoke' an admission, follow these steps:

Enter WADM (Administrative Withdrawal) in Student Program/Plan:

Click the **Academic Advisement** link.

▸ Academic Advisement

Click the **Academic Advising Summary** link.

Academic Advising Summary

Enter the student ID and press Enter or Search. Click the **Search** button.

Search

The Academic Advising Summary will list any previous Maxi Term and Academic Career the student has. Select the most recent career (e.g. Fall 2016/Winter 2017). For FOIP reasons some information has been removed.

Click the **Fall 2016 / Winter 2017** link.

From within Student Record Summary, navigation to other components in PeopleSoft can be completed via the Open list. Click the **Open** list.

Click the **Program/Plan Summary** list item from the Open list.

Click the **Go** button.

Go

The Program and Plan Summary grid indicates any previous careers/programs the student has been enrolled. In this example, Car# U-0 indicates program ARBCH-NODC-MAJ, Car# U-1 indicates ARBCH-PSYC-MAJ and Car# U-2 SCBCH-BISC-MAJ. To revoke admission to Car# U-2 SCBCH (BISC-MAJ) select the applicable program (e.g. SCBCH) under the "Prog" column for one of the latest terms (ex. 2167 or 2171). Click the **SCBCH** link.

Program and Plan Summary
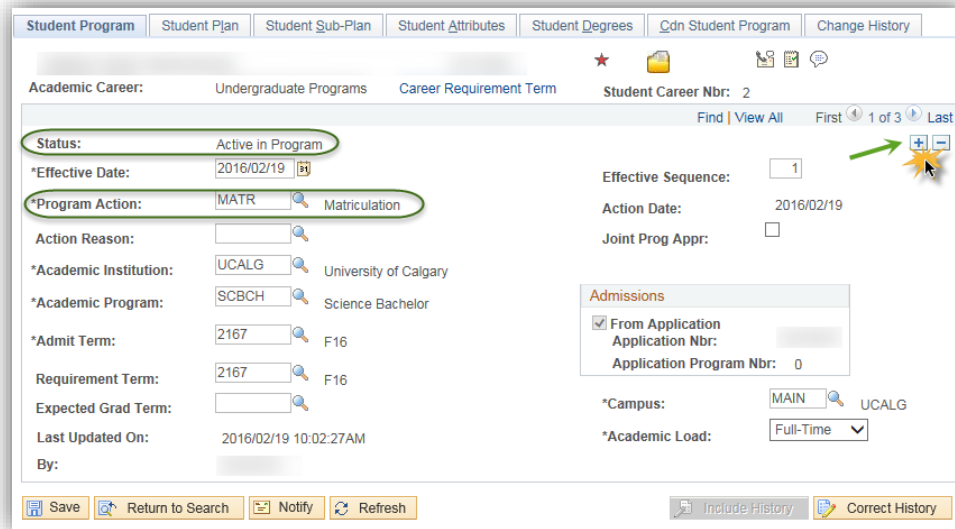
1991/07/20   EDMS Save

☑ Display canceled program status data rows.

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Term	Appl Nbr	Prg#	Chc	Car#	Jnt	Pri	Prog	Degree	Aft	Plan	R	DG	Lvl	Load	Type	Adm St	Prg St	Reason	COI	Standing
2127	42185144	0	1			N	ARBCH	BSC-DEG		PSYC-MAJ			1		HS		CN	QMAJ		
2127	42185144	1	2			N	ARBCH	BA-DEG		PSYC-MAJ			1		HS		CN	QMAJ		
2127	42185144	2	3			N	ARBCH	BLNK-DEG		NODC-MAJ			1		HS	A	AC	SELF		
2127-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ			1	F						
2131-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ			1	F						GOOD
2133-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ			1	N						
2135-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ			1	N						
2137	42220246	0	1			N	ARBCH	BSC-DEG		PSYC-MAJ			2		CF3		CN	AUTO		
2137	42220246	1	1			N	ARBCH	BSC-DEG		PSYC-MAJ			2		CF3	A	AC			
2137-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			1	F						
2141-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			2	F						GOOD
2143-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			2	P						
2145-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			2	N						
2147-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			2	F						
2151-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	F						GOOD
2153-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	N						
2155-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	N						
2157-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	F						
2161-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	F						
2163-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			4	N						
2167	42318427	0	1			N	SCBCH	BSC-DEG		BISC-MAJ			3		CF2	A	AC			
2167-U				U-2	N	P	SCBCH	BSC-DEG		BISC-MAJ			4	N						
2171-U				U-2	N	P	SCBCH	BSC-DEG		BISC-MAJ			4	N						

The Student Program/Plan indicates the student status is Active in Program (SCBCH - Science Bachelor) and has been matriculated. In order to revoke the admission, add a new row and indicate the effective date. Click the **Add a new row** button.

➕

A new row is added and the Effective Date must be changed to the first day of the start of the term as the cancellation will occur on that date. If there is no corresponding admission record for the term entered, this effectively indicates the program ceased to be "active" at the end of the prior term. You may enter the term directly or choose the applicable date.

After the applicable Effective Date is entered, select Program Action to indicate Administrative Withdrawal (WADM). Click the **Look up Program Action** button.

Select WADM Administrative Withdrawal from the list of Program Actions.
Click the **WADM** link.

The Status is set to cancelled, and the effective date has been entered. An Action Reason should now be entered. Click the **Look up Action Reason** button.

Scroll down the list of Action Reasons to select the applicable action. For example, select DNRG Did Not Register. Click the **DNRG** link.

Press Save after adding a row, indicating the correct effective date, entering the Program Action (WADM) and the applicable Action Reason (DNRG). Click the **Save** button.
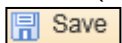
The following message is just a warning to let the user know that the student has been term activated for future terms for the program being revoked. In a later step in this process the student will be reactivated for those same future terms but for their previous program. Click the **OK** button.
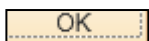
Navigate to Program and Plan Summary to ensure there are no active programs associated with the terms beyond the revocation. Click the **Program and Plan Summary** menu.

Note in this example there are now no active programs associated with the Car# U-2 SCBCH BISC-MAJ, as indicated by N-N. Also indicated is the reason of WARV and DNRG. If you are going to make changes to the change of program application you just revoked and re-matriculate it, go to Maintain Applications for the program, add a new application row, make your changes to the program, and click save. You can now readmit the student. If you instead want to reactivate the student in their previous program, select the previous program under the "Prog" column for one of the most recent terms (e.g. ARBCH).
Click the **ARBCH** link.

Program and Plan Summary

☑ Display canceled program status data rows.

Personalize | Find | 🗗 | 🔣   First ◀ 1-23 of 23 ▶ Last

Term	Appl Nbr	Prg#	Chc	Car#	Jnt	Pri	Prog	Degree	Aft	Plan	R	DG	Lvl	Load	Type	Adm St	Prg St	Reason	COI	Standing
2127	42185144	0	1		N		ARBCH	BSC-DEG		PSYC-MAJ		1			HS		CN	QMAJ		
2127	42185144	1	2		N		ARBCH	BA-DEG		PSYC-MAJ		1			HS		CN	QMAJ		
2127	42185144	2	3		N		ARBCH	BLNK-DEG		NODC-MAJ		1			HS	A	AC	SELF		
2127-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ		1	F							
2131-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ		1	F							GOOD
2133-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ		1	N							
2135-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ		1	N							
2137	42220246	0	1		N		ARBCH	BSC-DEG		PSYC-MAJ		2			CF3		CN	AUTO		
2137	42220246	1	1		N		ARBCH	BSC-DEG		PSYC-MAJ		2			CF3	A	AC			
2137-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		1	F							
2141-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		2	F							GOOD
2143-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		2	P							
2145-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		2	N							
2147-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		2	F							
2151-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		3	F							GOOD
2153-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		3	N							
2155-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		3	N							
2157-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		3	F							
2161-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		3	F							
2163-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ		4	N							
2167	42318427	0	1		N		SCBCH	BSC-DEG		BISC-MAJ		3			CF2		CN	WARV		
2167-U				U-2			SCBCH	BSC-DEG		BISC-MAJ		4	N-N					CN	DNRG		
2171-U				U-2			SCBCH	BSC-DEG		BISC-MAJ		4	N-N					CN	DNRG		

Add a new row to insert a Program Action to re-activate the program.
Click the **Add a new row** button.

Click the **Look up Program Action** button.

Select MATR Matriculation from the list of Program Actions to re-activate the program. Click
the **MATR** link.

Look Up Program Action

Help

Program Action: begins with ☑
Description: begins with ☑

| Look Up | Clear | Cancel | Basic Lookup |

Search Results
View 100   First ◀ 1-15 of 15 ▶ Last

Program Action	Description
ACTV	Activate
ADRV	Admission Revocation
COMP	Completion of Program
DATA	Data Change
DEFR	Defer Enrollment
DISC	Discontinuation
DISM	Dismissal
MATR	Matriculation
PLNC	Plan Change
PRGC	Program Change
RADM	Readmit
REVK	Revoke Degree
SPND	Suspension
TRAN	Transfer to Other Career
WADM	Administrative Withdrawal

Once the Program Action is MATR (Matriculated), press the Save button to save the changes.
Click the **Save** button.

Save
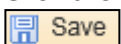
Ensure the changes have been made by navigating to Program and Plan Summary. Click the **Program and Plan Summary** menu.

Note the details on the grid which should now display the re-activated program for the most recent terms. This program is still not fully re-activated yet because under the "primary" column "S" (Secondary) is displayed (and there always must be one Primary program per term). Additionally, N-N is still showing under the "Load" column for the most recent terms, which is an indicator that the student is not eligible to enroll for these terms. This means that the program (Car # U-1) isn't really attached to those terms yet. To reset the primary program and Eligible to Enrol flag, first make a note of the student career number of the program you just re-activated (ex. Car # U-1).

Program and Plan Summary

1991/07/20   EDMS Save

☑ Display canceled program status data rows.

Personalize | Find | 🗗 | 🏢   First ◀ 1-23 of 23 ▶ Last

Term	Appl Nbr	Prg#	Chc	Car#	Jnt	Pri	Prog	Degree	Aft	Plan	R	DG	Lvl	Load	Type	Adm St	Prg St	Reason	COI	Standing
2127	42185144	0	1		N		ARBCH	BSC-DEG		PSYC-MAJ			1		HS		CN	QMAJ		
2127	42185144	1	2		N		ARBCH	BA-DEG		PSYC-MAJ			1		HS		CN	QMAJ		
2127	42185144	2	3		N		ARBCH	BLNK-DEG		NODC-MAJ			1		HS	A	AC	SELF		
2127-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ			1	F						
2131-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ			1	F						GOOD
2133-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ			1	N						
2135-U				U-0	N	P	ARBCH	BLNK-DEG		NODC-MAJ			1	N						
2137	42220246	0	1		N		ARBCH	BSC-DEG		PSYC-MAJ			2		CF3		CN	AUTO		
2137	42220246	1	1		N		ARBCH	BSC-DEG		PSYC-MAJ			2		CF3	A	AC			
2137-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			1	F						
2141-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			2	F						GOOD
2143-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			2	P						
2145-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			2	N						
2147-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			2	F						
2151-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	F						GOOD
2153-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	N						
2155-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	N						
2157-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	F						
2161-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			3	F						
2163-U				U-1	N	P	ARBCH	BSC-DEG		PSYC-MAJ			4	N						
2167	42318427	0	1		N		SCBCH	BSC-DEG		BISC-MAJ			3		CF2		CN	WARV		
2167-U				U-1	N	S	ARBCH	BSC-DEG		PSYC-MAJ			4	N-N						
2171-U				U-1	N	S	ARBCH	BSC-DEG		PSYC-MAJ			4	N-N						

Click the **Academic Advising Summary** menu.

Academic Advising Summary

The student ID should carry over from the previous page, press Enter or Search.
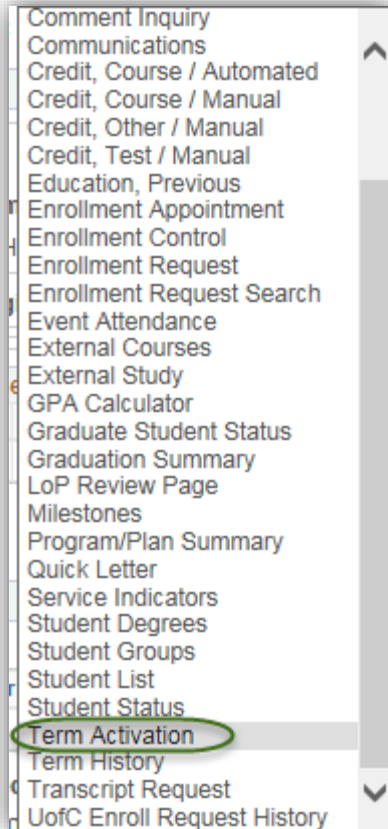Click the **Search** button.

Search

Select the applicable term (e.g. Fall 2016/Winter 2017).
Click the **Fall 2016 / Winter 2017** link.

From within Student Record Summary navigate to Term Activation via Open list.
Click the **Open** list.

Scroll down to view the other navigation options (e.g. Term Activation). Click the **Term Activation** list item.

```
Comment Inquiry
Communications
Credit, Course / Automated
Credit, Course / Manual
Credit, Other / Manual
Credit, Test / Manual
Education, Previous
Enrollment Appointment
Enrollment Control
Enrollment Request
Enrollment Request Search
Event Attendance
External Courses
External Study
GPA Calculator
Graduate Student Status
Graduation Summary
LoP Review Page
Milestones
Program/Plan Summary
Quick Letter
Service Indicators
Student Degrees
Student Groups
Student List
Student Status
Term Activation
Term History
Transcript Request
UofC Enroll Request History
```

Click the **Go** button.

Go

From Term Activation click View All to view all the Academic Careers for this student (e.g. 17). Click the **View All** link.

View All

Find the terms that the reactivated program is still not attached to or had N-N showing in the "load" column on the Program/Plan Summary (ex. F16/W16). In this example the Car #U-2 is attached to the Fall 2016 and Winter 2017 terms and this is the program that was just revoked/canceled (SCBCH-BISC-MAJ). Additionally, the Eligible to Enroll flag is not selected. To reset this so that the reactivated/active program is attached to these terms instead. Click the **Look up Student Career Nbr** button.

A list of student careers associated with this student are listed. Select the Student Career Number for the Active/ reactivated program (Ex. Career #1-ARBCH).

Click the **1** link.

Once the Student Career Nbr is 1 (Active) is selected, the eligible to Enroll flag is auto-selected. Scroll down to repeat this process for other terms where the Student Career Nbrs needs to change.

Once all Student Career Nbrs are set to the reinstated/active program) and the Eligible to Enroll is selected Save the changes. **Tip:** Click **View 1** to collapse the view to avoid scrolling down to SAVE.
Click the **View 1**.

Click the **Save** button.

It is recommended to navigate once again to the Program and Plan Summary to ensure the changes are reflected and the student has been properly reinstated. Click the **Academic Advising Summary** menu.

The student ID should carry over, press Enter or Search. Click the **Search** button.

Select the applicable term from (e.g. Fall 2016/Winter 2017).
Click the **Fall 2016/Winter 2017** link.

Use the Open navigation list to navigate to Program and Plan Summary.
Click the **Open** list.

Click the **Program/Plan Summary** list item.

Click the **Go** button.

Go

Note the Program and Plan Summary now shows the reactivated program as the Primary Program (P) for the terms and N-N is no longer showing under the "load" column. As long as there is an N, F or P under the "load column" for those terms, this means the student is eligible to enroll for those terms

Letter of Permission Processing

Processing an Existing Letter of Permission Request

1. Access the **Letter of Permission Review** screen using the navigation:
   Records and Enrolment > Transfer Credit Evaluation > Letter of Permission Review

   Alternatively, this screen can be accessed from the Open List on Academic Advising Summary.

2. Change the **Academic Organization** to the desired faculty (e.g. ED, Education)

3. Change the **Faculty Approval** to **Approval Pending.**

4. Click **Search**. This will give you a list of Letters of Permission that are pending per faculty.

Search Results
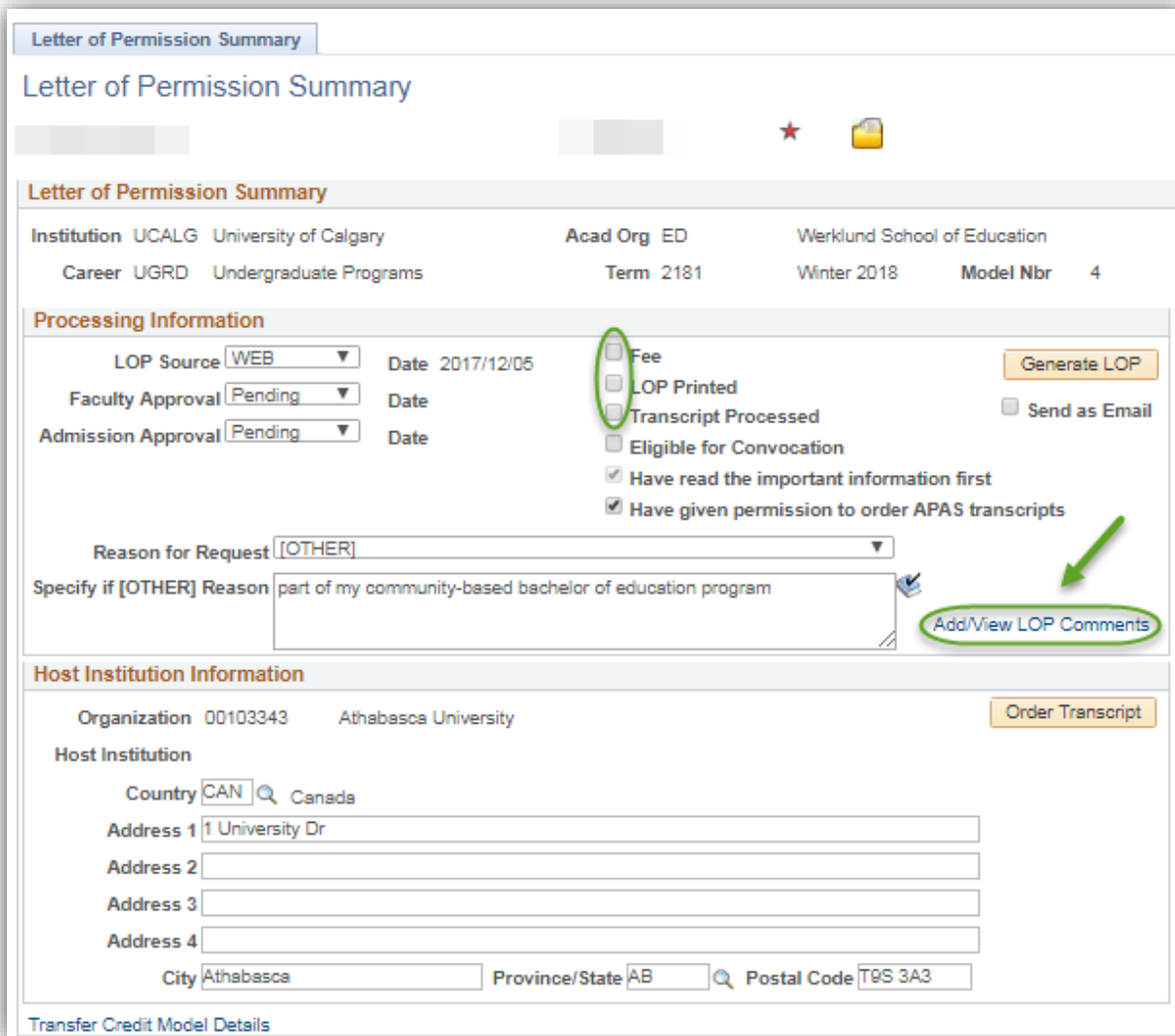
View All

ID	Name	Academic Organization	Articulation Term	Transfer Model Nbr	Faculty Approval	Admission Approval	External Org ID	External Org Description	Source Institution (Other)	Requirement Date	Transcript/Status
00862673	Henahan,Franklin	ED	2181	4	Pending	Pending	00103343	Athabasca University	(blank)	2017/12/05	N
10075190	Brown,Jesse E	SC	2181	23	Pending	Pending	00103343	Athabasca University	(blank)	2017/11/18	N
10084371	Noronha,Bruce C	SC	2181	5	Pending	Pending	00103343	Athabasca University	(blank)	2017/11/07	N
10090375	Verkley,Evan	AR	2181	6	Pending	Pending	0010364	University Of Saskatchewan	(blank)	2017/12/02	N
10112154	Holland,Raghad P	SC	2181	5	Pending	Pending	00103343	Athabasca University	(blank)	2017/12/01	N
10134866	Spalding,Min A	HA	2181	9	Pending	Pending	10164958	Univ of Western Australia	(blank)	2017/12/06	N
10137092	Zarubiak,Melissa J	AR	2181	4	Pending	Pending	00103343	Athabasca University	(blank)	2017/11/28	N
10148386	Leung,Daniel	KN	2181	2	Pending	Pending	00103343	Athabasca University	(blank)	2017/12/05	N
10153162	Furey,Jenny-Lynn C	HA	2181	2	Pending	Pending	10165564	Seoul National University	(blank)	2017/12/01	N
10154380	Hunte,Jeanne	SC	2181	4	Pending	Pending	00103343	Athabasca University	(blank)	2017/11/28	N
10162981	Bustard,Eduardo Y	AR	2181	4	Pending	Pending	00103343	Athabasca University	(blank)	2017/12/07	N
10164384	McIntyre,Shauna J	AR	2181	5	Pending	Pending	00103343	Athabasca University	(blank)	2017/12/01	N
10169729	Nicoll,Claudia	HA	2181	7	Pending	Pending	(blank)	(blank)	Universidad Carlos III de Madrid	2017/12/04	N
10171240	Firza,Lawrence G	HA	2181	2	Pending	Pending	10164958	Univ of Western Australia	(blank)	2017/12/05	N
10171390	McEvoy-Halston,David C	KN	2181	3	Pending	Pending	(blank)	(blank)	University of Limerick	2017/12/04	N
10173843	Hopkins,Nancy	HA	2181	4	Pending	Pending	(blank)	(blank)	Univeristy of Hong Kong	2017/12/08	N
10174889	Hall,Michele E	HA	2181	3	Pending	Pending	10165790	Uppsala universitet	(blank)	2017/12/01	N
10175643	Thompson,Meika	HA	2181	3	Pending	Pending	10165735	Nanyang Tech University	(blank)	2017/12/04	N

Processing a Letter of Permission

1. On the **Letter of Permission Review** screen enter the students ID number and search or if you have already searched pending Letter of Permission's by faculty (as outlined previously) you can click on the student link from the search results. This will navigate to the **Letter of Permission Summary** Screen.

- When the **Fee** box is checked the student has paid the application fee (if it is not checked, the application fee has not been paid).
- When the **LOP Printed** box is checked the letter of permission has been printed
- When the **Transcript Processed** box is checked the Admissions office has received this student's transcript.
- The Address section should be automatically completed if the student is planning on attending a Canadian institution.
- When clicking on the **Add/View LOP Comments** you will see the following:

Adding L of P Comments

- When selecting the **Comment Code** lookup you can view a list of pre-set comments (i.e. Students can transfer a maximum of 10 fce from other institutions).
- Additional comments can be entered in **Free Format Comments**.
- Use the **+** or **−** icon to add or remove comments.
- Clicking on the **Book** icon will run 'spell check'.

UNIVERSITY OF CALGARY

Letter of Permission Comments

ID
Institution UCALG — University of Calgary — Acad Org E
Career UGRD — Undergraduate Programs — Term 2

Coded Comments

*Comment Code [   ] 🔍 ←──────────────→

Comment [   ]

Free Format Comments

*Comment [   ]

[OK] [Cancel]

Look Up Comment Code   ×

                                                              Help ▲

Academic Institution   UCALG
Admission Comment Code [begins with ▼] [   ]
            Description [begins with ▼] [   ]

[Look Up] [Clear] [Cancel] Basic Lookup
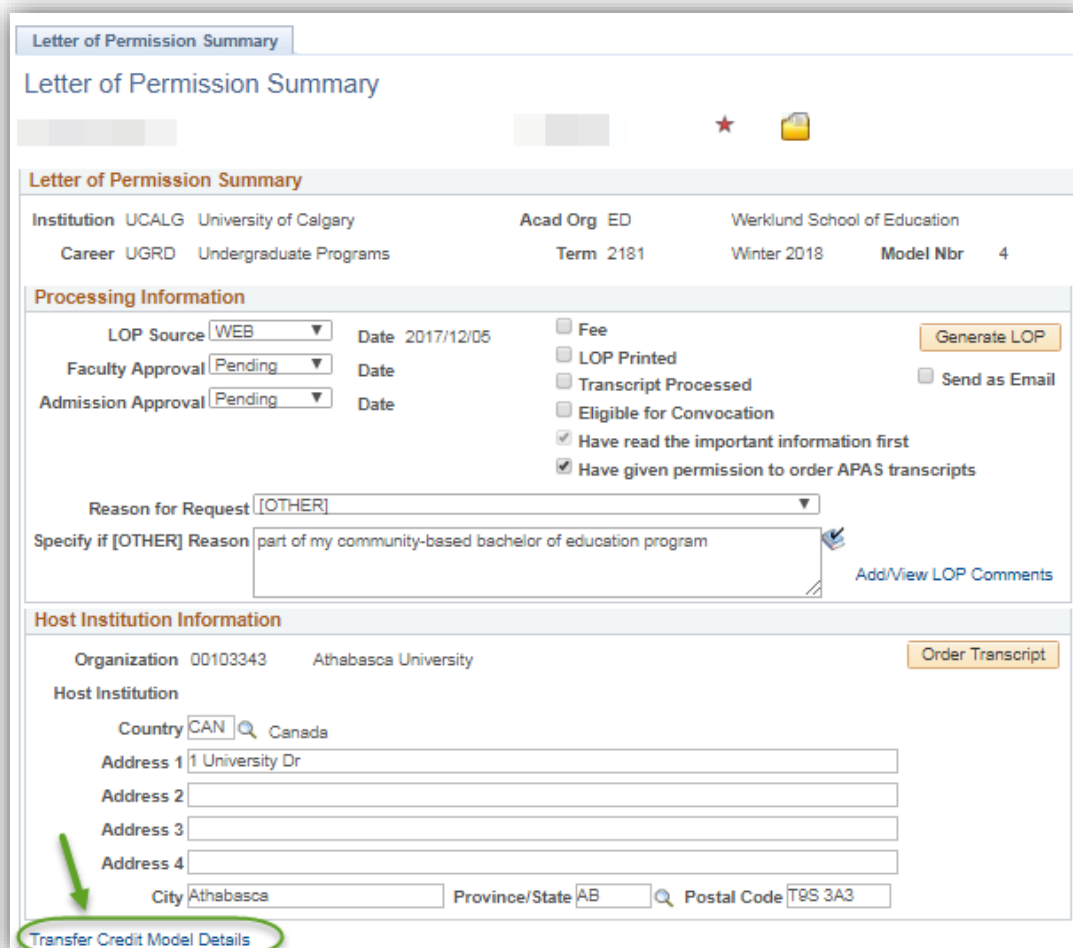
Search Results

View 100   First ◄ 1-44 of 44 ► Last

Admission Comment Code	Description
C010	No credit for D grades
C011	No credit below C
C020	No D grades except MRC/MHC
C030	No credit for grades of 4
C040	No credit for grades of 2
C050	No credit for grades of 1
C060	No credit for grades < 60%
C070	No credit for grades P or S
C080	Required to carry __ failures
C090	No credit for work at _____
C100	No credit insufficient qtr hrs
C110	Credit TBD: portfolio
C120	Credit TBD: course outlines
C130	Exemption Req Statistics 343
C140	Credit for 5 Jr Social Wrk crs
C150	No credit grade < C- for Adult
C160	No credit: insufficient sem hr
C170	Exempt Req Statistics 343/347
C180	Major in Surveying Engineering
C190	Course work > 8 yr old for BSc
C200	Credit > 10 years old
C220	Max of 10 full-course equiv
C221	Max 5 full-course equiv BHSc
C222	Max of 2 3-credit D or D+ grds
C230	Credit for ___ being assessed
C231	FA currently evaluating credit
C250	Faculty to review credit
C251	EN review of credit
C260	Generic Transfer Credit eg 2XX
C261	Generic credit (BACCS)
C270	Credit for BACS 202 or 300
C280	Fall 1999 BCOMM revision
C281	Course outlines
C290	College & Inst of Tech courses
C300	Max credit: BACCS degree prog
C310	Credit > 10 years old: BACCS
C320	Max Credit: IB
C330	No credit for grades < 5
C340	Faculty review: IB credit
C350	BComm Distinction
C360	AP less than 4
C370	HA LOP term comment
C380	HA Grade of C-

2. Transfer Credit Model Details
- On the **Letter of Permission Summary** screen click the **Transfer Credit Model Details** link to look at which courses the student intends on taking at their host institution.

The **Transfer Credit Model** screen for automated transfer credit will appear (click **View All**).

This screen contains a record of

- transfer credits (once the transcript has been put up and processed by the admissions office a transfer credit model is added here)
- a record of what the student intends on taking on their Letter of Permission.

You can differentiate between the two different types by looking at the **Transcript Level**.

- **Official** (transcript level) is put up by the admissions office once the official transcripts have been received. Once official transcripts are received the admissions office puts up their separate transfer credit model in addition to showing a Transcript Level of Official. Under **Data Source** Letter of Permission will appear to indicate Letter of Permission Credit.
- **Not Print** (transcript level) states that the attached information is listing which courses the student intends on taking on their letter of permission. This model will list all L of P's at a single institution together (i.e. Athabasa University, etc. will both be listed under this model). This information is particularly important for verifying Letters of Permission.

Note **Model Number 4** and the **Transcript Level** is **Not Print.** Additional, the transfer model is making reference to a letter of permission under the **DATA Source** section – **Letter of Permission** displays.

In this example this student has a letter of permission transfer credit model for their Winter 2016 Letter of Permission.

External Subject/Catalog Nbr section lists the external courses the student has taken while the **Equivalent Subject Catlg Nbr** section lists the transfer agreement.

For Canadian institutions with transfer agreements (as listed on **/CRED**) the **Incoming** and **Equivalent Course** sections should be filled out if the application has been completed online and the transfer credit model is 'automated'.

Approving/Denying Letter of Permission Requests

1. Return to the **Letter of Permission Summary** screen.
2. Change the **Faculty Approval** section (to Approved or Not Approved).
3. Click **Save.**

Viewing/Printing the Letter of Permission

4. Click on the **Generate LOP** button to view a PDF version of the letter. The letter can then be printed from the PDF file.
5. If you click on the **Send as Email** check box, and then the **Generate LOP** button, the Letter of permission will be emailed to the student.

Checking Positive Service Indicator (to see if a student is currently on a Letter of Permission)

1. Click on the **Positive Service indicator icon** located at the top of many Campus Solutions screens.

2. This will display the **Manage Service Indicators** page which provides a summary of the Service Indicators on the Student Record. Click on the **LOP** link.

3. If a student is currently on a letter of permission the **Services Impacted** will be displayed (This alert is removed once the Admissions office processes the students transfer credits).

Entering/Revising the Credit to be Awarded

1. Viewing the Transfer Credit Model & Checking Transfer Agreements
- Use the forward/back buttons go to the appropriate model number.

In this example, this student has applied to take PSYC 400 and NUTR 331 with Athabasca University in Winter 2016. The **Equivalent Subject** section has been automatically filled in since this is an automated transfer credit model which can make use of transfer agreements. This student will receive credit for EDPS 9XX and KNES 237. If the equivalent subject section needs to be modified select the **icon** to navigate to Equivalent Course Information.

2. Editing the Equivalent Subject section (*if necessary*)

*   Select the **Look up** Icon to bring you to the search page where the appropriate course can be selected.

Note:

Under this page only the course equivalence can be edited. If further revisions need to be made (i.e. Adding/Changing courses, changing start/end dates) a separate procedure will need to be executed as follows.

*   After changes have been made, click **OK** which will bring you back to the Transfer Credit Model screen.
*   On the Transfer Credit Model screen click **SAVE**.

3. If this letter is ready to be approved and printed, return to the **Letter of Permission Review** page and perform the steps listed previously.

Making revisions to automated credit created by a web application

Changes to automated credit created by a web/student centre L of P application must be made through the **External Education** screen. This is a separate and different process from revising Course Credit Manual Letters of Permission (see the section on entering an application directly).

Important Note:

Since the external education screen contains a record of the student's high school, official transfer credits as well as web/student service centre L of P information it is **IMPORTANT** when making revisions to a letter of permission you are working with the appropriate data and that **NO** changes are made to the high school or official transfer credit information.
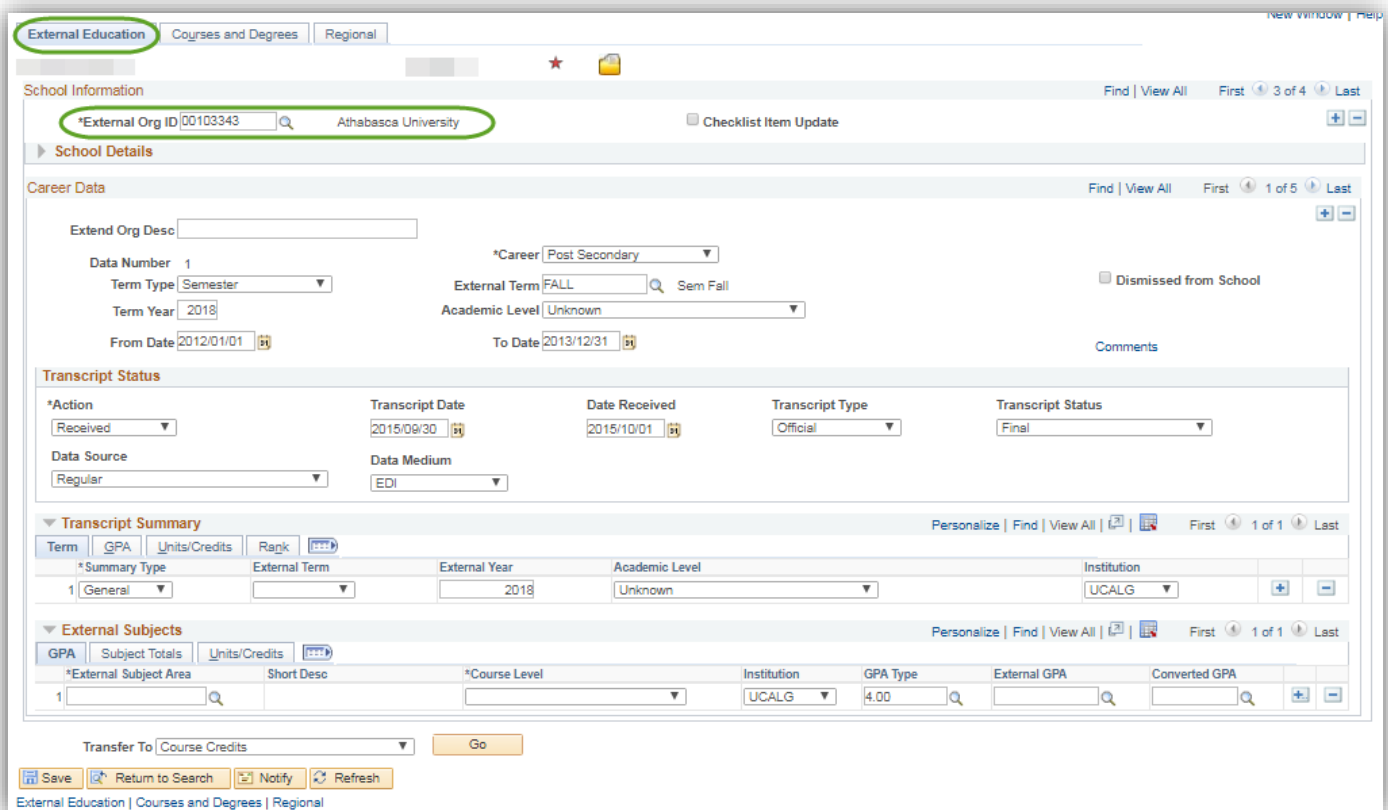
It is important to **never** delete information on the external education screen or the transfer credit model.

1. Select the **External Education** screen.

   Navigation: **Records and Enrolment > Transfer Credit Evaluation > External Education**

 Select the **External Education** tab.

- Use the forward/back buttons to select the appropriate record/external organization (this page will list all external credit i.e. high school courses, official transfer credit as well as web/student service centre Letter of Permission requested courses).

2. **Revising Course Information**

Changing Begin/End Dates:

- Select the **Courses and Degrees** tab.
- Click the [Timeframe] tab within the **External Courses** table, or use the expand button [⊞▶] to expand all columns and scroll to the appropriate fields (i.e. Begin Date and End Date).
- Change the dates in the highlighted sections below.

Adding a course to an existing letter of permission

A maximum of 10 courses may be listed on a single Letter of Permission. This page must be completed exactly as shown below.

- As outline above, on the External Education screen use the forward/back buttons to select the appropriate External Organization and then select the **Courses and Degrees Tab**

- Click the [table icon] button to expand the entire section.
- Click the **Add/Remove** buttons to insert new rows.

  When the [+] button is clicked, you will be prompted to enter the number of rows you wish to add. You will need to add a new row for each additional course you are adding to the Letter of Permission.

- On the Course tab, use the lookup button or type in the School Subject and Course Nbr. The Course Name will automatically be filled in if the course is already part of the database of courses from that institution.

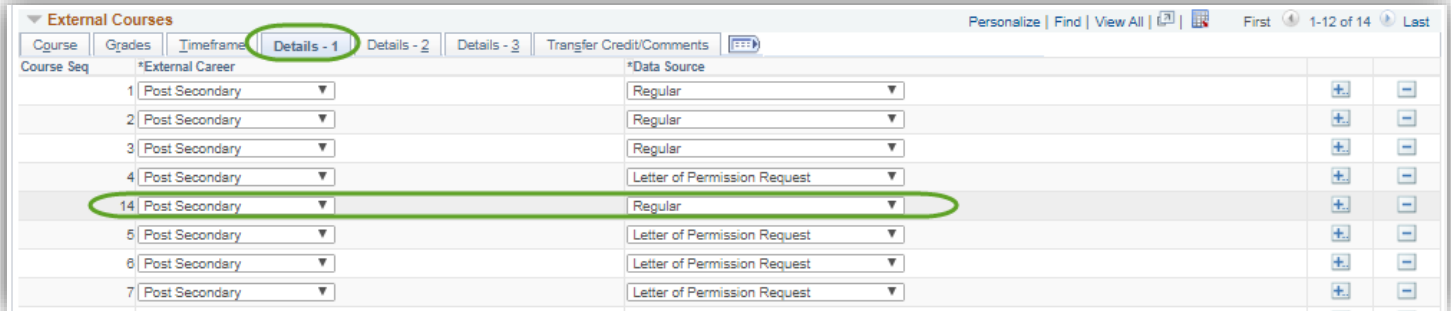- Within the Grades tab, select '**UGRD**' in the Grading Scheme
- Use the lookup 🔍 button to enter '**TRN**' in Grading Basis and '**LOP**' in **Grade In,** as shown above.
  NOTE: Even if '**TRN**' is already selected in **Grading Basis** you will still have to enter it in order for **LOP** to be selected for the **Grade In** field.

- Within the **Timeframe** tab, enter '**1**' in **Data Number** and select a **Term Type** of '**Other**.' You can change the **Begin** and **End Dates**, as required.
  NOTE: The dates can only be modified when a **Term Type** of '**Other**' is selected, as shown.

- Ensure the **Details** tab is filled out as shown (i.e. **Data Source** '**LOP**', **Acad Level** '**Unknown**' and **Course Level** '**Regular**').
- Once all the appropriate changes have been made click **SAVE**.

***Note:

This page attempts to AUTO complete certain sections and often the AUTO complete function is incorrect.   After saving double check the information to make sure it is still correct.

Updating the Letter of Permission Transfer Credit Model
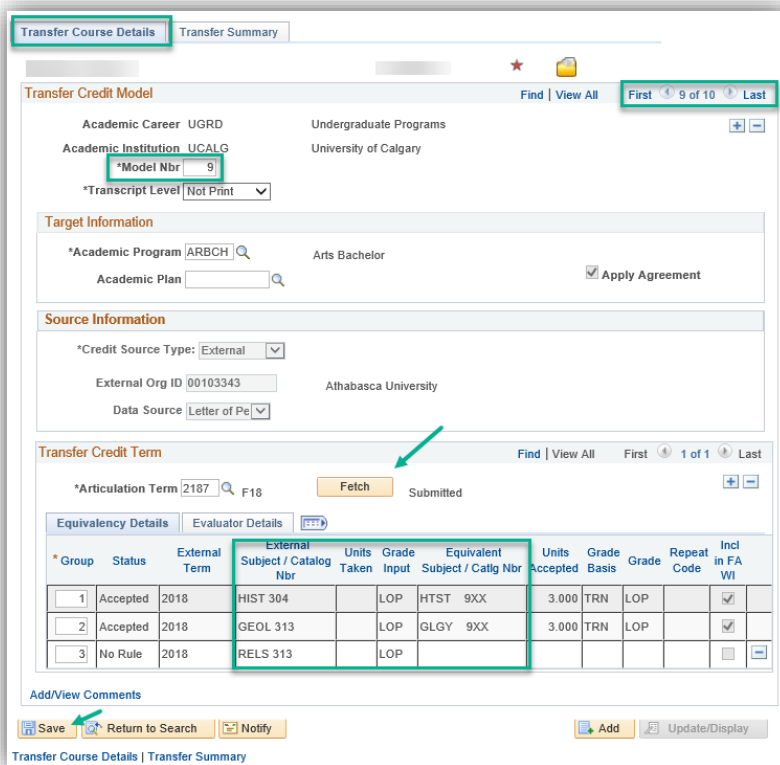
If changes have been made on the external education screen, you must update the course information on the transfer credit model.

- Go to the Letter of Permission review page

  Navigation: **Records and Enrolment > Transfer Credit Evaluation > Letter of Permission Review**

  Alternatively this page can be accessed from the Academic Advising Summary drop down menu.

- Once the appropriate Letter of Permission is selected click on the **Transfer Credit Model details** link at the bottom the page
- Using the Forward/Back buttons select the appropriate **Transfer Credit Model Number**
- Once the appropriate Model Number has been selected click the **Fetch** button as shown below (this will update the changes that have been put up on the external education).
- Ensure that the **Equivalent Subject/Catalogue Number** field contains the correct course equivalent. Modify as necessary.
- Click **SAVE**. The revised letter can now be printed from the Letter of Permission review screen.

Entering an Application for a Letter of Permission

Many faculties encourage the on-line Application for Letter of Permission to enable their students to enter their Letter of Permission requests themselves, through self-service.

When it is necessary for a staff member to enter the application on behalf of a student, there are two ways:

- Staff can access the on-line application themselves through the Student Services Center. This is recommended since it is the easiest method and can result in either an automated or manual transfer credit model, depending on whether the institution is selected from the drop-down menu).

- Staff can enter the transfer credit model and letter of permission record directly in to the Student Administration System (the only option available is to make the transfer credit model 'Manual').

Entering the Application using the Letter of Permission Application through the Student Services Center

1. Access the Student Services Centre screen using the navigation:
   Campus Community > Student Services Centre

2. Select **Letter of Permission** under the Academic drop down menu and press **Go**.

3. On the next screen select the **Term** that the student has applied for a letter.

4. On the next screen several sections must be filled out.

- **Host Institution**
  After clicking on **Look up** and entering the name of the institution, if it does not display, select **Other – Not one of the Above** to enter an institution that does not appear on the list.

Letter of Permission

1. Application Form

1─2─3

Request for Spring 2018

Please read the important information below

- The information on your LOP application is collected under the authority of the Post-secondary Learning Act. It is required to process your request. If you have any questions about the collection or use of this information please contact your Faculty office.

  For institutions outside of Alberta, calendar descriptions of all courses you are requesting and information about the weight and level of the courses at the host institution must be submitted by fax, e-mail or in-person.
  Click **here** for contact information).

  Your request will not be processed until this information is received.

- Please note, you may submit a maximum of 1 application for this time-frame. If you require a second letter, or any revisions to an existing letter, please contact your faculty.

- As long as you are studying at another institution with our permission, you do not have to apply for readmission to the University of Calgary to resume your studies upon your return. If you did not apply for permission prior to taking a course elsewhere, please contact your faculty office to determine whether you may be issued a retroactive letter.

- **There may be some conditions under which you cannot apply for a letter of permission on-line. Please read these guidelines before submitting an application.**

  ☐ **I have read the above information.**

Host institution you wish to attend

Please select the host institution that you plan to attend by clicking on the 'click here to select an institution' button below.

Host Institution: [click here to select an institution]

Country: [click here to select a country]

Address 1: [_____]

Address 2: [_____]

Address 3: [_____]

Address 4: [_____]

City: [_____]

Province /State: [click here to select a province / state]

Letter of Permission

Institution Selection

Enter any part of the institution's name and then click on the 'Look Up' button.

Name Contains: UNIVERSITY OF ALBERTA

Look Up

Click on the 'SELECT' button below for the institution that you are interested in.

Select an Institution

SELECT   University of Alberta

Other - Not One of The Above

CLOSE

Host institution you wish to attend

Please select the host institution that you plan to attend by clicking on the 'click here to select an institution' button below.

Host Institution: [click here to select an institution]

University of Alberta

Country: [click here to select a country]   Canada

Address 1: Office of the Registrar

Address 2: 2nd Floor Administration Building

Address 3:

Address 4:

City: Edmonton

Province /State: [click here to select a province / state]   **Alberta**

Postal: T6G 2M7

Reason for Request

Please select why you are submitting this application by choosing an item from the drop-down list below. If you are not able to find a reason that represents your situation, please choose [OTHER] from the drop-down list and then type it in manually in the 'Specify if [OTHER] Reason' field below when it appears.

Reason for Request: [Choose One ▼]

Course(s) you intend to take at the host institution

Please enter details in the table below for course(s) that you intend to complete at the host institution.

To enter 'Course Name' details, click on the 'select course name' button to choose from a list of defined values. If you are not able to find the course name that you are interested in, please type it in manually to the right of the 'select course name' button.

To enter 'Course Number' details, click on the 'select course number' button to choose from a list of defined values for the 'Course Name' entered. If you are not able to find the course number that you are interested in, please type it in manually to the right of the 'select course number' button.

☐ **I give permission to the University of Calgary to request transcripts from ApplyAlberta partner institutions.**

Course(s) you intend to take at the host institution

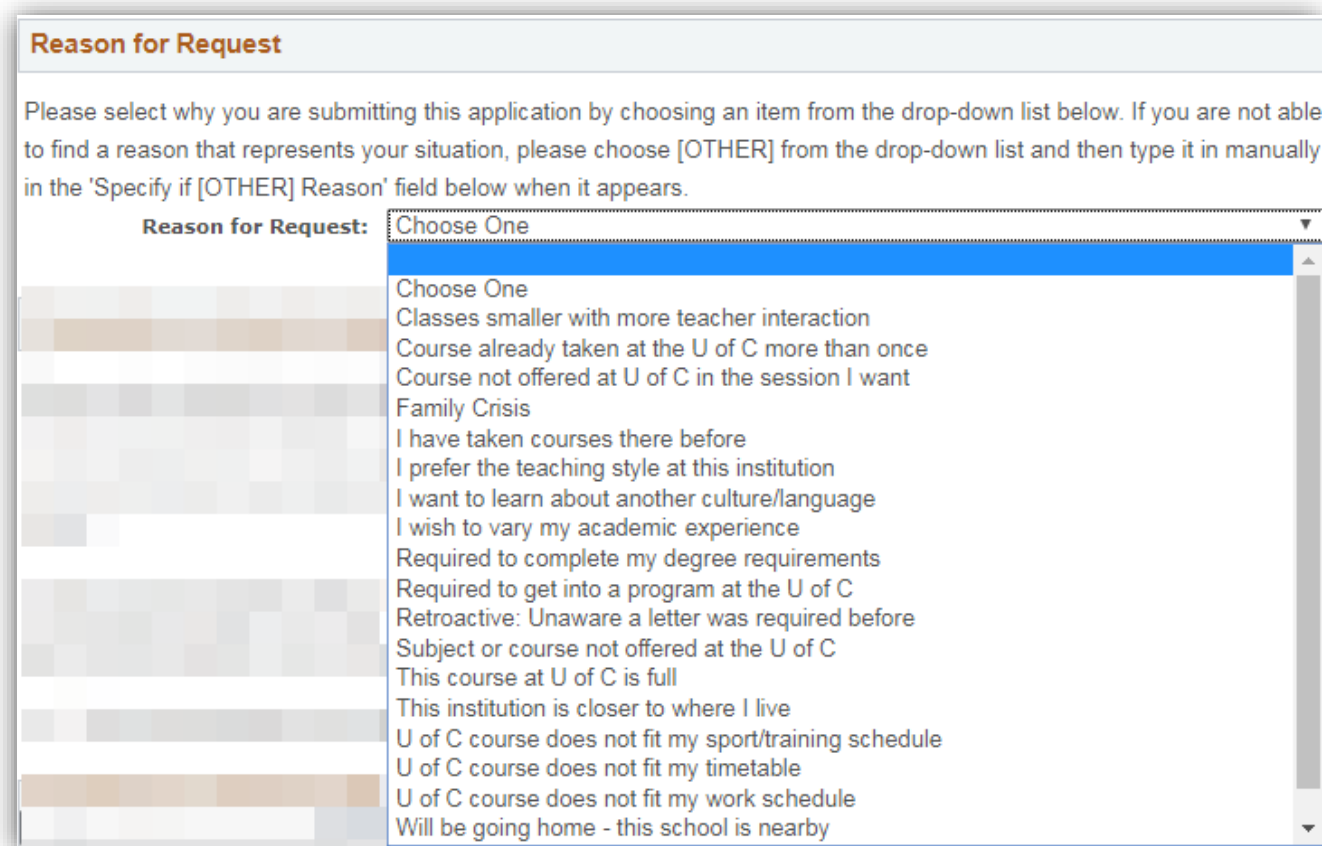|		Course Name		Course Number	From Month	To Month
1	select course name		select course number		▼	▼
2	select course name		select course number		▼	▼
3	select course name		select course number		▼	▼
4	select course name		select course number		▼	▼
5	select course name		select course number		▼	▼

If the institution is listed, it will automatically autocomplete the address section. If there is any inconsistency with the address, it may be manually edited.

Note:

If the institution is selected from the look up list, the transfer credit model will be created as 'automated' credit.   If you select 'Other' and type in the name of the institution manually, the transfer credit model will be created as 'manual' credit.

- **Reason for Request**
  Select the **Reason for Request** from the pull down menu.

Reason for Request

Please select why you are submitting this application by choosing an item from the drop-down list below. If you are not able to find a reason that represents your situation, please choose [OTHER] from the drop-down list and then type it in manually in the 'Specify if [OTHER] Reason' field below when it appears.

Reason for Request: Choose One ▼

- Choose One
- Classes smaller with more teacher interaction
- Course already taken at the U of C more than once
- Course not offered at U of C in the session I want
- Family Crisis
- I have taken courses there before
- I prefer the teaching style at this institution
- I want to learn about another culture/language
- I wish to vary my academic experience
- Required to complete my degree requirements
- Required to get into a program at the U of C
- Retroactive: Unaware a letter was required before
- Subject or course not offered at the U of C
- This course at U of C is full
- This institution is closer to where I live
- U of C course does not fit my sport/training schedule
- U of C course does not fit my timetable
- U of C course does not fit my work schedule
- Will be going home - this school is nearby

- **Course Name, Number and From and To Month**
  The Course Name, Number and From and To Month may be edited by selecting the appropriate green button or pull down menu.

Once the Host Institution has been selected, the Course Name and Number screens will be customized to display courses that are offered at the selected institution. If the desired course name/number does not appear it can be entered in manually.

After all selections are completed, select **NEXT** at the bottom of the page.

5. On the next screen a summary of all the information that you have entered for the letter of permission will appear. If the information is correct, press **SUBMIT**. If additional changes need to be made, select **PREVIOUS** to return to the last screen to make further changes.

6. After pressing **SUBMIT** the next screen will let you know if the process was successful.

Note:

Since we are putting up an application on the student's behalf this process will not ask us for a fee payment online. If the student were to apply for a letter of permission online through their Student Service Centre, they will be asked to make a fee payment only if their faculty requires a fee.

Entering the Application Directly in to the Student Administration System

To put up a manual application we will first put up the Transfer Credit Model then we will put up the L of P and link the two together.

1. **Putting up the Transfer Credit Model**: these are the courses that the student plans on taking on their Letter of Permission.

- From the **Academic Advising Summary** screen use the pull down menu to select **Course Credits – Manual**.
- On the **Course Credits – Manual** screen **ADD** a new row.

Complete the highlighted sections below customizing the Institution, Term, and Course(s) sections to match what the student is taking on their Letter of Permission.

In the example this student is in the Faculty of Science and is requesting a letter of permission (Retroactive) to Athabasca for Spring 2018 to take Psyc 289 (which transfers to U of C as Psyc205).

- Note the **Transfer Credit Model Number** (this will be required for Step 2)

- The Articulation Term is the semester that the student is intending to complete on their letter of permission (in the example the student has a retroactive L of P for Spring 2018).
- If Group credit is to be awarded, change the Group and Seq# sections. For example, the first course in a group should be labelled Group 1 Seq# 1 and the second course in the group should be Group 1 Seq#2.
- On the Equivalent Course section, you can click on the look up icon to select the equivalent course.
- LOP should be entered in the Grade Input and Official Grades boxes in the Incoming Course and Equivalent Course sections.
- Once the course information has been entered, click on the **Details** link on the left side of the Incoming Course section to enter the appropriate Start/End dates.

The Equivalent Course Information displays.

- **From/To** dates can be edited in the highlighted areas below.

- Once the dates have been entered, click **OK** to return to the Transfer Credit Model page and click **SAVE**.

2. **Putting up the Letter of Permission**

- From the Academic Advising Summary page select **LoP Review Page** (Letter of Permission Review) from the pull down menu.
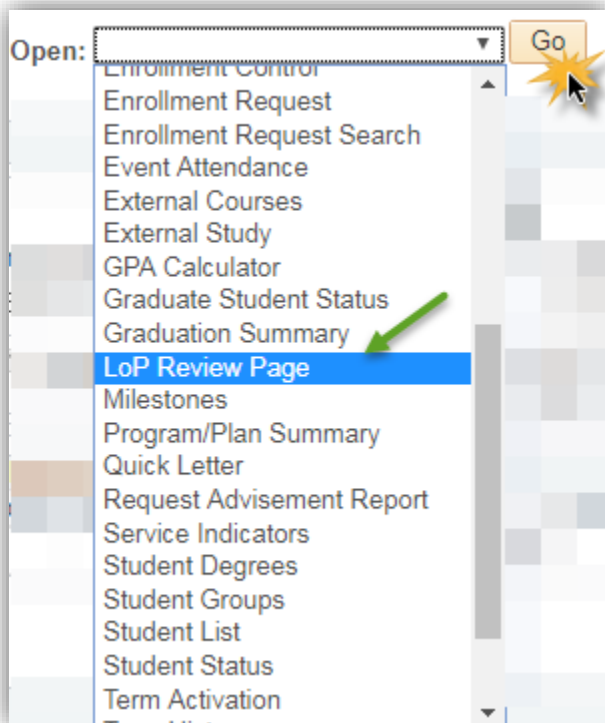
- Click **Add a New Value** and complete the menu customizing the student ID number, Academic Organization, Articulation Term and Transfer Model Number for the student you are creating the Letter of Permission for.

- The Transfer Model Nbr corresponds to the Transfer Credit Model number that we previously. Click **ADD**.

This will bring you to the **Letter of Permission Summary** screen.

To see if you have linked the correct transfer credit model to your Letter of Permission, click on the **Transfer Credit Model Details** link.

Transfer Course Details | Transfer Summary

Transfer Credit Model

Find | View All First ◀ 6 of 6 ▶ Last

Academic Career	UGRD	Undergraduate Programs
Academic Institution	UCALG	University of Calgary
*Model Nbr	6	
*Transcript Level	Unofficial ▼	

Target Information

*Academic Program SCBCH 🔍 Science Bachelor

☑ Apply Agreement

Academic Plan 🔍

Source Information

*Credit Source Type: External ▼

External Org ID 00103343 🔍 Athabasca University

Data Source Letter of Pe ▼

Transfer Credit Term

Find | View All First ◀ 1 of 1 ▶ Last

*Articulation Term 2183 🔍 P18 [Fetch]

Equivalency Details | Evaluator Details

Status	External Term	External Subject / Catalog Nbr	Units Taken	Grade Input	Equivalent Subject / Catlg Nbr	Units Accepted	Grade Basis	Grade	Repeat Code	Incl in FA WI
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Transfer Course Details | Transfer Summary

Appendix I

Managing Repeat Codes

This contains general information about how the PeopleSoft Student Administration system checks for repeated courses and enforces the University of Calgary's repeated course policy.

The Repeat Check process operates in several ways:

1. It checks whether a course is being repeated at the point when a student enrolls in a course or when a staff member enrolls a student into a course. (Note repeat codes are not assigned to the courses at this point).

2. It is run as a batch process once per term after final grades for that term have been posted.

3. It runs automatically whenever courses are posted to a student's record as part of a transfer credit evaluation process. The checking routine is built into the transfer credit posting action.

Upon enrollment in a course:
The system will alert a student or staff member with a message at the time of enrollment when it detects that the enrollment is a second attempt. The message lets the person know that this attempt is subject to the institution's repeated course policy and may not earn credit.

This is an example of the message that staff may see:

Message Sequence 1	Message	Last Update DateTime 16/09/19 10:32:09AM

Course previously taken and may be subject to institutional repeat policy. (14640,187)

When graded, this course may be subject to the Institution's Repeat Rules. It should be verified that this course will apply toward the course of study.

Additionally, the system enforces the institution's course repeat policy by not permitting a student or staff member to complete a course enrollment if that enrollment will be the third or subsequent attempt for a particular course. An override must be applied to the enrollment transaction for it to complete successfully (i.e. a third or subsequent attempt must be approved by the Faculty of the student's program). A third attempt approval creates an 'OVRD' indicator on the course during the enrollment request transaction. See the chart for more information.)

Batch Repeat Checking:
This process locates every instance where a course in the recently completed term (i.e. now has a final grade) is part of a "set" of repeated courses. The effect of the process is that the newly completed instance of the course is compared to the previously completed instance.

For example, if this is the second attempt, the final grade is compared to the final grade of the first attempt and the system determines which was the higher grade of the two. If this is a third or fourth attempt, the current final grade is compare to the "highest" of the previously completed courses. The newest grade is compared with the grade that was previously marked as the "HIGH" attempt.

Repeat Code Chart:

	Grade	*On Enrolment	Round 1	Round 2	Round 3
First Attempt	C		Low	Low	Low
Second Attempt	B		High	Low	Low
Third Attempt	A+	OVRD		OHGH	High
Fourth Attempt	A	OVRD			OLOW

The institution's rules are set up so that only the highest attempt earns credit toward the completion of program requirements. See above after the fourth attempt, only one of the attempts is marked as "HIGH" and the system will set this attempt as the one that earns credit. However, the final grades of ALL attempts are included in the term GPA calculation for the term in which they occurred.

Posting of Transfer Credit:

Repeat checking is very comprehensive and takes into account all course instances where the course ID is the same. Therefore when a course has been recorded as a valid transfer credit, it will be included in the repeat count with a course taken subsequently here (at UofC) which is the same or equivalent (i.e. has the same course ID).

It is important to note every time transfer credit is posted the entire series of checking occurs as if the batch repeat check process has been run. This can cause some challenges within the system.

For example, a student may take a course at Mount Royal University and it is being recorded at the point of re-admission to a program they were previously in at the U of C. While at U of C they may have already completed the same course twice. When the new transfer credit model is posted, the system will post the third attempt whether an approval for a third attempt has been attached to the transfer credit record or not. The repeat checking rules expect the override indicator to be present on any attempt beyond the first two. If the indicator is not there, the system will not have the information it needs to determine what actions to take.

In this case, the REPT code is applied by the system to the "unknown" attempt. Administrative staff will require a solid understanding of the repeat rules in order to interpret what repeat code is to be manually assigned and to which course. These code corrections will bring the repeat information back into alignment so the repeat checking process will provide the correct outcome the next time it occurs. Therefore when a repeat code is being corrected within a transfer credit model, the model will also need to be re-posted to trigger the repeat check to be re-done.

When transfer credit is involved, the Admissions Office is the primary resource for problem resolution.

Managing Repeat Code Assignment Tool:
A Repeated Course Report can be requested by Academic Organization (i.e. by Faculty) and further limited by Program and Plan if that is found to be useful. The purpose of this report is twofold:

1. Report every instance where the REPT code is appearing on a student's record. This code is meant to indicate that the Repeat Check process could not make a determination how to handle a specific set of repeated courses.

   If all the courses within the set were taken at the U of C, it is possible for authorized staff to change the repeat codes assigned to each instance manually by using one of the Enrollment Components (usually the Enrollment Request or the Quick Enroll are used). In effect, the staff member is replacing the repeat check process and performing the task of indicating this attempt is HIGH and this other attempt is LOW.

   If one of the instances of the course involved a transfer credit, then the procedure will likely involve a combination of changing a U of C enrollment record and/or reposting the transfer credit model in which the repeated course is contained as previously mentioned. If the change is in an Automated Transfer Credit model, then the change must be processed by the staff at the Office of Admissions. Other Credit-type models can be re-posted by staff at Faculty Offices with the necessary security access for such transactions.

2. To report any instance where the same course is earning credit more than once. This is a safety measure as it is not expected that the system will permit this. However, should this occur, it is important that the situation be investigated and corrected to ensure that students are not being permitted to earn credit inappropriately in contravention to the institution's repeat rules.

   Note: There is a point of time when a student's record will indicate that more than one attempt "earns credit." This occurs when the newest attempt is still in progress. The student is in a course that could potentially earn credit but the final grade is not present and the repeat check has not yet taken place. It is a temporary state of affairs so the Repeated Course Report does not include such situations. The student record summary will display a Potential Repeat flag at the base of the relevant column in these cases. However, staff may notice this which report the "Earn Credit" status for a class such the Academic Advising Summary Screen – Full Course History:

This is the "Earn Credit" indicator column. Note both MATH 249 courses have a "Y" value. the second attempt is still in progress. Once both are completed and the repeat check is done, they will be noted like other repeat courses where only the highest grade will show a "Y" under the "Earn Credit" column.