



**UNIVERSITY OF
CALGARY**

Senior Academic Advising

Training Guide

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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.

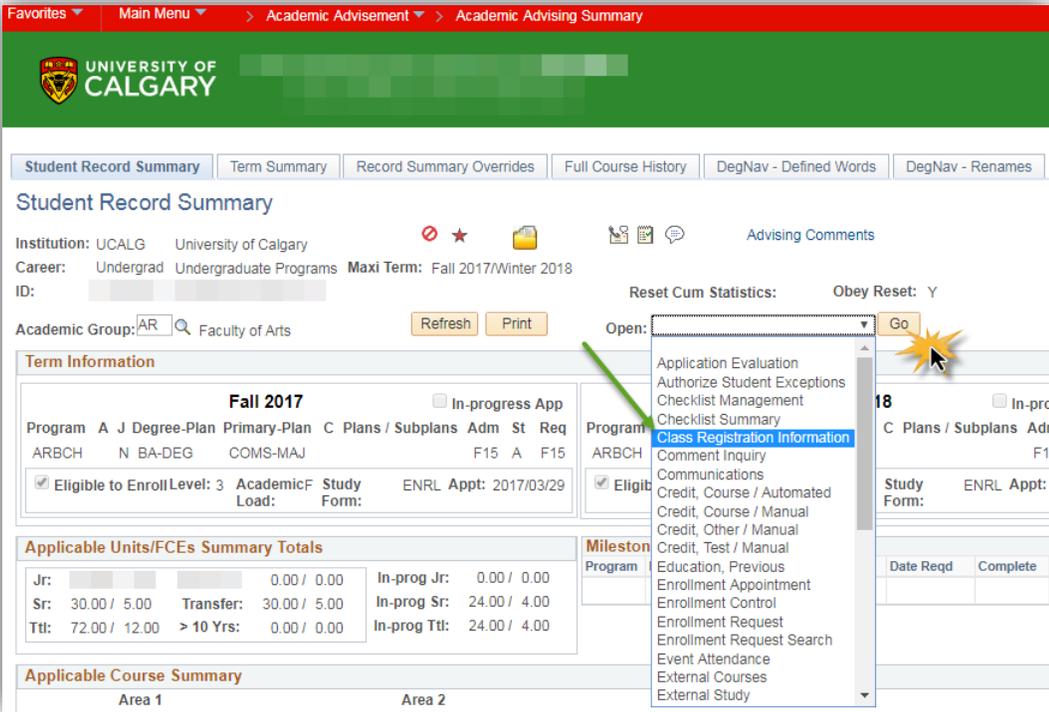
Note:

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.



The screenshot shows the 'Academic Advising Summary' page for a student at the University of Calgary. The page displays student information, including institution (UCALG), career (Undergrad), and term (Fall 2017/Winter 2018). The 'Open:' dropdown menu is open, showing a list of options. 'Class Registration Information' is highlighted in blue. A green arrow points to this option. A yellow starburst icon is next to the 'Go' button.

Applicable Units/FCEs Summary Totals			
Jr:	0.00 / 0.00	In-prog Jr:	0.00 / 0.00
Sr:	30.00 / 5.00	Transfer:	30.00 / 5.00
Ttl:	72.00 / 12.00	> 10 Yrs:	0.00 / 0.00
		In-prog Sr:	24.00 / 4.00
		In-prog Ttl:	24.00 / 4.00

Applicable Course Summary	
Area 1	Area 2

2. Enter the term in which the course is offered, and the course name and number and click [Search](#).

Class Registration Information

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	
Term	= ▼	2177	
Subject Area	begins with ▼	ENGG	
Catalog Nbr	begins with ▼	349	
Course Offering Nbr	= ▼		
Academic Career	= ▼		

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

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

Class Registration Information

Academic Institution: UCALG
 Term: 2177
 Academic Career: Undergrad
 Subject Area: ENGG
 Catalog Nbr: 349
 Course ID: 115900
 Course Offering Nbr: 1

Course Requirement: [ENGG 349](#) 
 Consent Required: No Consent

Personalize | Find | |															
First  1-9 of 9  Last															
Class	Crse Topic	Class Nbr	Status	Cap Enrl	Tot Enrl	Assoc Class	Class Requirement	Catlg Rqs	Res Cap Seq	Capacity Requirement	Start Date	Rsrv Cap	Rsrv Cap Used	Consent Required	
1	LEC 01		70506	Open	165	133	1	None	Y	1	ENME Students Only	2017/03/01	203	115	N
2										1	ENME Students Only	2017/08/27		115	N
3	LEC 02		70507	Open	165	154	2	None	Y	1	ENCH & ENOG Students Only	2017/03/01	195	109	N
4										1	ENCH & ENOG Students Only	2017/08/27		109	N
5	LEC 03		70508	Open	150	114	3	None	Y	1	ENCI and ENGO only	2017/03/01	163	89	N
6										1	ENCI and ENGO only	2017/08/27		89	N
7	TUT T01		70509	Open	165	133	1	None	Y		None				N
8	TUT T02		70510	Open	165	154	2	None	Y		None				N
9	TUT T03		70511	Open	150	114	3	None	Y		None				N

 Save
 Return to Search
 Notify

- 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.

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.

Class Registration Information

Academic Institution: UCALG
 Term: 2107
 Academic Career: Undergrad
 Subject Area: ENGG
 Catalog Nbr: 349
 Course ID: 115900
 Course Offering Nbr: 1

Course Requirement: [ENGG 205, AMAT 217 and 219](#)
 Consent Required: No Consent

Class	Crse Topic	Class Nbr	Status	Cap Enr	Tot Enr	Assoc Class	Class Requirement	Satg Rqs	Res Cap Seq	Capacity Requirement	Start Date	Rsrv Cap	Rsrv Cap Used	Consent Required
1	LEC 01	72074	Open	124		1	None	Y	1	BMEC Students Only	2009/04/20	15		N
2	LEC 02	72076	Open	114		2	ENGG Students Only	Y		None				N
3	LEC 03	72078	Open	114		3	ENGG Students Only	Y		None				N
4	LEC 04	72080	Open	114		4	ENGG Students Only	Y		None				N
5	TUT T01	72082	Open	124		1	None	Y		None				N
6	TUT T02	72084	Open	114		2	ENGG Students Only	Y		None				N
7	TUT T03	72086	Open	114		3	ENGG Students Only	Y		None				N
8	TUT T04	72088	Open	114		4	ENGG Students Only	Y		None				N

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).

Requisite Summary

Requisite Summary

Requirement Group: 001797 Description: ENGG 205, AMAT 217 and 219
 Acad Group: Subject: ENGG Catalog Nbr: 349
 Effective Date: 1901/01/01 Status: Active

PREREQUISITE: ENGG 205, AMAT 217 and 219. (Please see Calendar Description for more information)

Con	Rqrmnt	Con	Type	Condition	Units	Count	Gpv	Courses
1	(		PRE			MIN: 1.00	1.0	AMAT 217 (100135)
2	AND		PRE			MIN: 1.00	1.0	AMAT 219 (100136)
3	AND		PRE			MIN: 1.00	1.0	ENGG 205 (115848)

- 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.

Requisite Summary

Requisite Summary

Requirement Group: 003725 Description: BMEC Students Only
 Acad Group: UCALG Subject: Catalog Nbr:
 Effective Date: 1901/01/01 Status: Active

Restricted to BMEC Students Only

Con	Rqrmnt	Con	Type	Condition	Units	Count	Gpv	Courses
1			CND	PLEQ BMEC-MAJ				

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:**

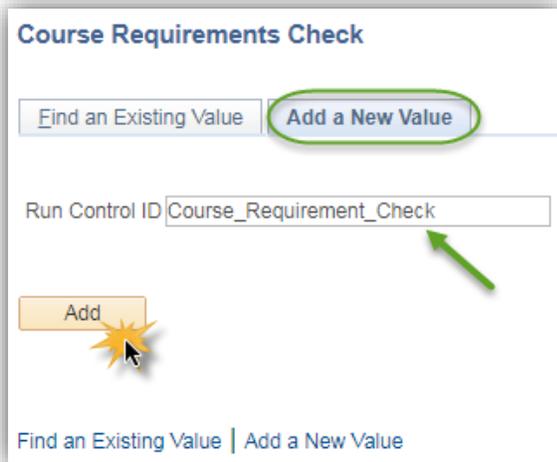
- students who are registered in a senior level course without having completed 3 full junior level courses
- students who violate a registration restriction (i.e., a Haskayne student registered in a course restricted to PSYC majors only) unless that restriction is defined as a requisite along with the 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.

Course Requirements Check

Run Control ID Course_Requirement_Check Report Manager Process Monitor **Run**

Required Criteria

*Institution: UCALG University of Calgary
*Term: 2181 Winter 2018

Optional Criteria

Subject Area: MATH
Catalog Nbr:
Class Section:
Session:
Academic Org (Faculty): AR

Save Return to Search Notify Add Update/Display

2. Run the report as usual.

- Click on **Run**.
- On the Process Scheduler Request ensure the format is CSV: click **OK**.

Process Scheduler Request

User ID 04274535 Run Control ID Course_Requirement_Check

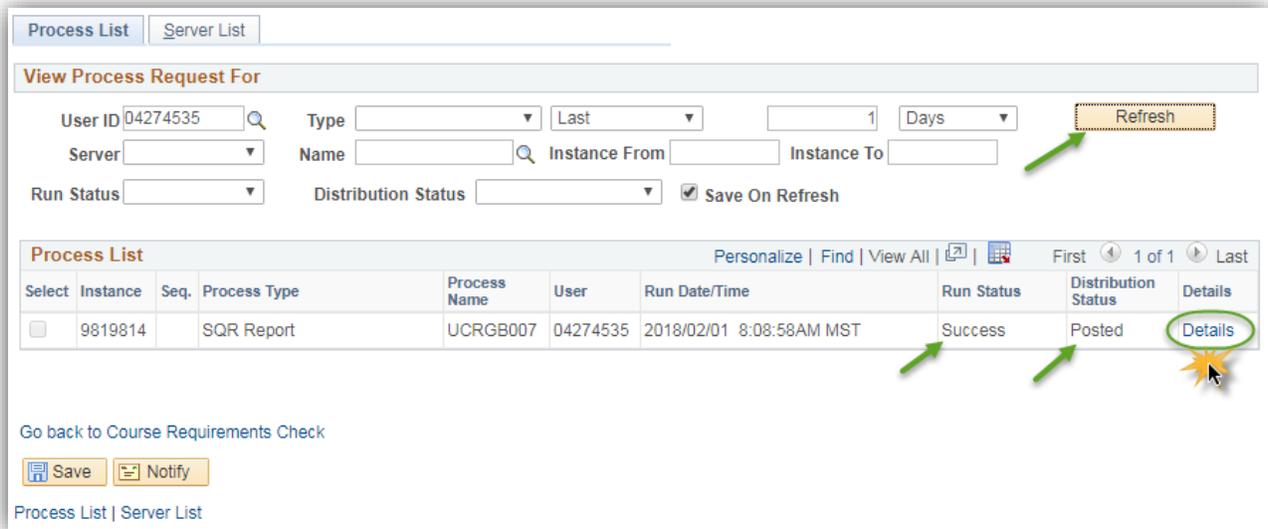
Server Name: Run Date: 2018/02/01
Recurrence: Run Time: 8:24:40AM Reset to Current Date/Time
Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	Format	Distribution
<input checked="" type="checkbox"/>	Pre-requisite checker	UCRGB007	SQR Report	Web	CSV	Distribution

OK Cancel

- 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.



Process List | Server List

View Process Request For

User ID: 04274535 | Type: [] | Last: [] | 1 Days | Refresh

Server: [] | Name: [] | Instance From: [] | Instance To: []

Run Status: [] | Distribution Status: [] | Save On Refresh

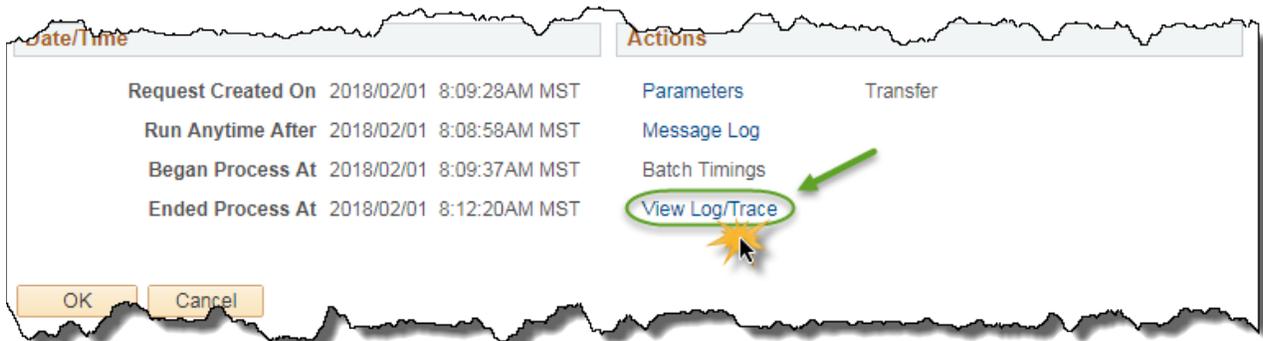
Process List | Personalize | Find | View All | First | 1 of 1 | Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	9819814		SQR Report	UCRGB007	04274535	2018/02/01 8:08:58AM MST	Success	Posted	Details

Go back to Course Requirements Check

Save | Notify

Process List | Server List



Date/Time | **Actions**

Request Created On 2018/02/01 8:09:28AM MST | Parameters | Transfer

Run Anytime After 2018/02/01 8:08:58AM MST | Message Log

Began Process At 2018/02/01 8:09:37AM MST | Batch Timings

Ended Process At 2018/02/01 8:12:20AM MST | View Log/Trace

OK | Cancel

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

View Log/Trace

Report

Report ID	5416806	Process Instance	9819814	Message Log
Name	UCRGB007	Process Type	SQR Report	
Run Status	Success			

Pre-requisite checker

Distribution Details

Distribution Node	PSREPORTS	Expiration Date	2018/03/18
-------------------	-----------	-----------------	------------

File List

Name	File Size (bytes)	Datetime Created
SQR_UCRGB007_9819814.log	2,024	2018/02/01 8:12:20.315975AM MST
ucrgb007_9819814.out	709	2018/02/01 8:12:20.315975AM MST
ucrgb007_Req_check_errs.csv	1,354	2018/02/01 8:12:20.315975AM MST
ucrgb007_Requirements.csv	6,161	2018/02/01 8:12:20.315975AM MST

Distribute To

Distribution ID Type	*Distribution ID
User	04274535

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

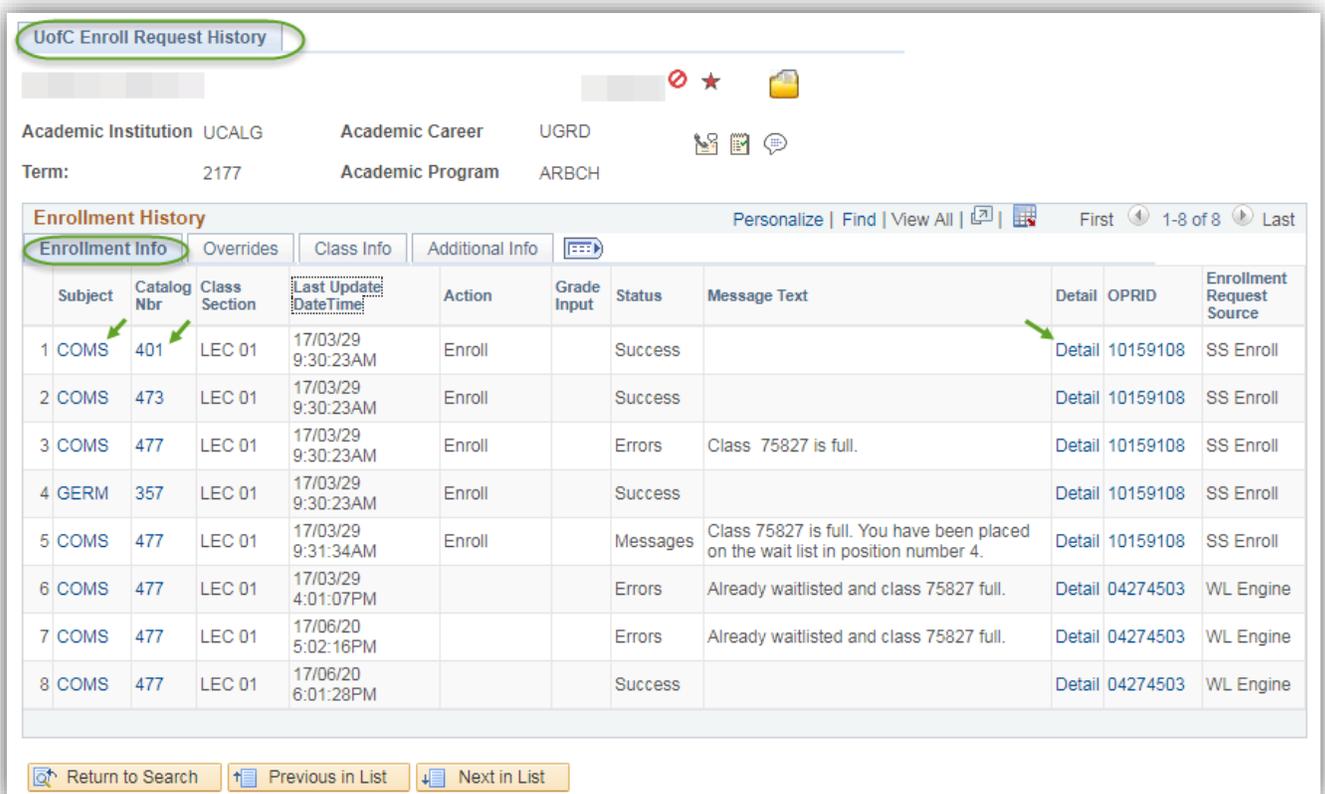
Navigation: [Records and Enrollment](#) > [Enroll Students](#) > [UofC Enroll Request History](#)

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.



UofC Enroll Request History

Academic Institution UCALG Academic Career UGRD
Term: 2177 Academic Program ARBCH

Enrollment History Personalize | Find | View All | First 1-8 of 8 Last

Enrollment Info Overrides Class Info Additional Info

Subject	Catalog Nbr	Class Section	Last Update Date/Time	Action	Grade Input	Status	Message Text	Detail	OPRID	Enrollment Request Source
1 COMS	401	LEC 01	17/03/29 9:30:23AM	Enroll		Success		Detail	10159108	SS Enroll
2 COMS	473	LEC 01	17/03/29 9:30:23AM	Enroll		Success		Detail	10159108	SS Enroll
3 COMS	477	LEC 01	17/03/29 9:30:23AM	Enroll		Errors	Class 75827 is full.	Detail	10159108	SS Enroll
4 GERM	357	LEC 01	17/03/29 9:30:23AM	Enroll		Success		Detail	10159108	SS Enroll
5 COMS	477	LEC 01	17/03/29 9:31:34AM	Enroll		Messages	Class 75827 is full. You have been placed on the wait list in position number 4.	Detail	10159108	SS Enroll
6 COMS	477	LEC 01	17/03/29 4:01:07PM			Errors	Already waitlisted and class 75827 full.	Detail	04274503	WL Engine
7 COMS	477	LEC 01	17/06/20 5:02:16PM			Errors	Already waitlisted and class 75827 full.	Detail	04274503	WL Engine
8 COMS	477	LEC 01	17/06/20 6:01:28PM			Success		Detail	04274503	WL Engine

Return to Search Previous in List Next in List

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.

Senior Academic Advising

SA - Advising



- **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.

Subject	Catalog Nbr	Class Section	Appointment	Override Action Date	Srvclnd	Unit Load	Override Time Conflict	Wait List Okay	Closed Class	Class Links	Permission	Requisites	Grading Basis	Class Units	Career	Ovrdr Requirement Designation
1	COMS	401	LEC 01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	COMS	473	LEC 01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	COMS	477	LEC 01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	GERM	357	LEC 01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	COMS	477	LEC 01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	COMS	477	LEC 01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	COMS	477	LEC 01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	COMS	477	LEC 01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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**.

Enrollment History									
Enrollment Info			Overrides		Class Info		Additional Info		
Subject	Catalog Nbr	Class Section	Enrollment Request ID	Seq #	Repeat Code	Requirement Designation	Requirement Designation Option	Requirement Designation Grade	Transcript Note ID
1	COMS	401	LEC 01	0008073484	1				
2	COMS	473	LEC 01	0008073484	2				
3	COMS	477	LEC 01	0008073484	3				
4	GERM	357	LEC 01	0008073484	4				
5	COMS	477	LEC 01	0008073511	1				
6	COMS	477	LEC 01	0008085211	187		No		
7	COMS	477	LEC 01	0008313632	224		No		
8	COMS	477	LEC 01	0008313800	214		No		

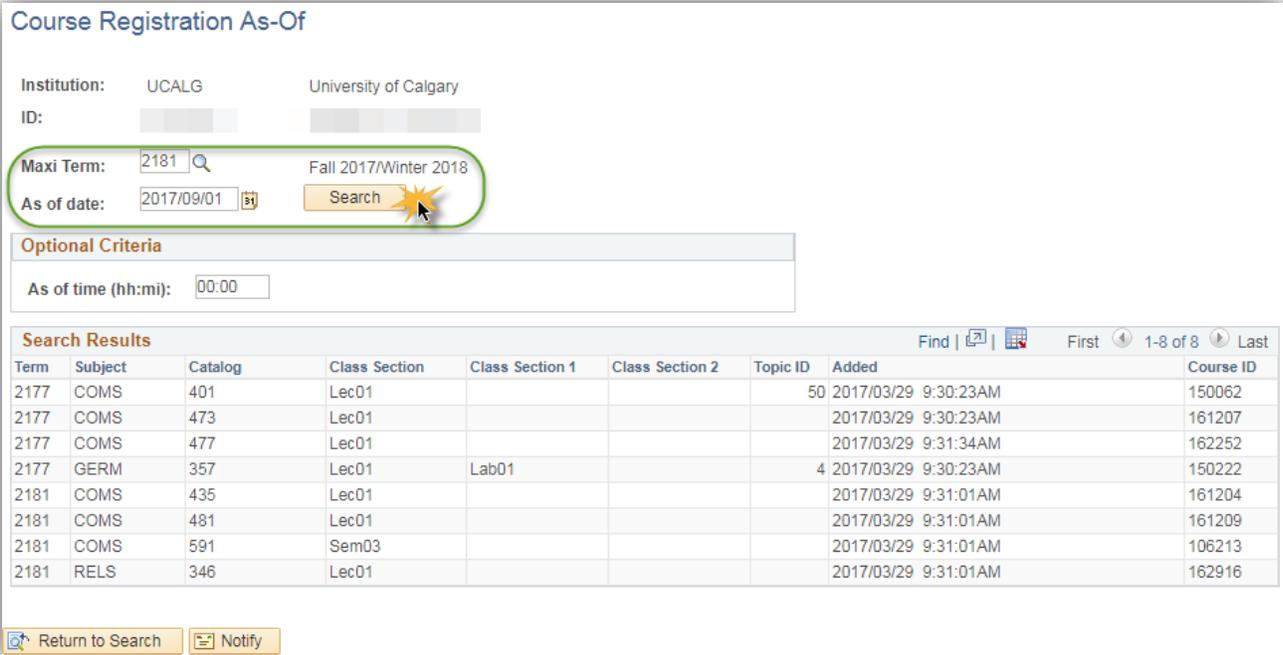
Note the **Sequence Number** associated with the Enrollment Request ID. If it is greater than 1, that indicates that the course was part of a set of courses that the student submitted from their shopping cart, rather than individually. On **Enrollment Request**, ensure you are looking at the correct 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: Fall 2017/Winter 2018
As of date:

Optional Criteria

As of time (hh:mi):

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

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.

UofC CRED Rules

Institution: UCALG University of Calgary

*External Org ID: Mount Royal University

By Incoming Course

Subject:

Course Nbr:

By Equivalent Course

Subject:

Catalog Nbr:

If they are looking for credits assessments for IB or AP credits, please go to [Test Transfer Rules](#).

Results based on Incoming Course:

INCOMING COURSE					EQUIVALENT COURSE		
Subj Area	Course	Begin Date	End Date	Grd Trnsfr	Course ID	Course	Units
PSYC	PSYC 1112		2000/04/30	Y	<input type="button" value="Paper"/> 134328	PSYC 2XX	3.00 <input type="button" value="Paper"/>
PSYC	PSYC 1210	1983/09/01	1990/08/31	Y	<input type="button" value="Paper"/> 134377	PSYC 351	3.00 <input type="button" value="Paper"/>
PSYC	PSYC 1210		1983/08/31	Y	<input type="button" value="Paper"/> 134328	PSYC 2XX	3.00
PSYC	PSYC 1211		1988/08/31	Y	<input type="button" value="Paper"/> 134328	PSYC 2XX	3.00
PSYC	PSYC 1212		1988/08/31	Y	<input type="button" value="Paper"/> 134328	PSYC 2XX	3.00
PSYC	PSYC 1212	1988/09/01	1997/08/31	N	<input type="button" value="Paper"/> 134360	PSYC 312	6.00 <input type="button" value="Paper"/>
PSYC	PSYC 1215	1989/09/01	1997/08/31	N	<input type="button" value="Paper"/>		
PSYC	PSYC 1213		1994/08/31	Y	<input type="button" value="Paper"/> 134328	PSYC 2XX	3.00
PSYC	PSYC 1214	1984/09/01	1990/08/31	Y	<input type="button" value="Paper"/> 134396	PSYC 383	3.00
PSYC	PSYC 1214		1984/08/31	Y	<input type="button" value="Paper"/> 134328	PSYC 2XX	3.00
PSYC	PSYC 1215	1988/09/01	1989/08/31	Y	<input type="button" value="Paper"/> 134328	PSYC 2XX	3.00

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.

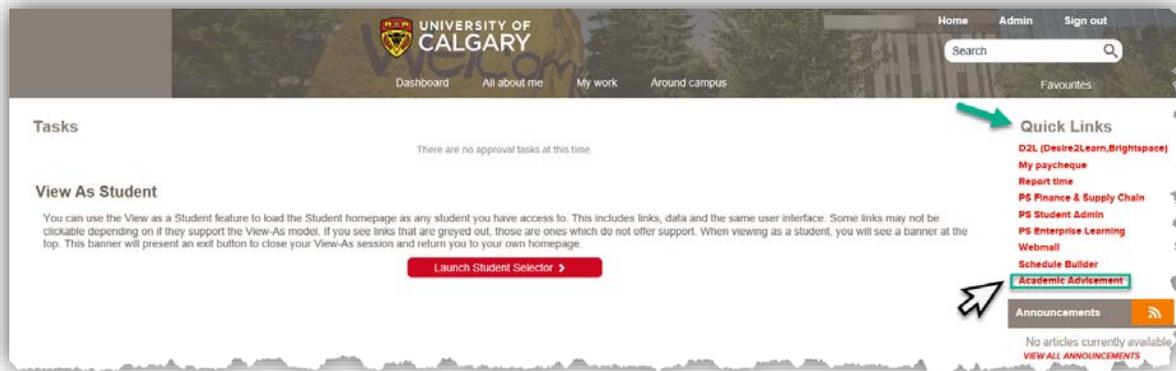
Most faculties have chosen to only have the application available for the Fall term as there tends to be restrictions on the changes allowed for the Winter term. It IS possible to have the application available for a particular faculty for staff use only, and it is also possible to have it available 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.

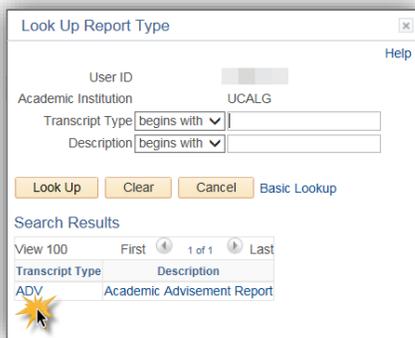
2. Click the [Student Advisement](#) link.

3. Click the [Request Advisement Report](#) link.

4. Click the [Add a New Value](#) tab.

5. Enter the desired student ID number. Click the [Look up Report Type](#) button.

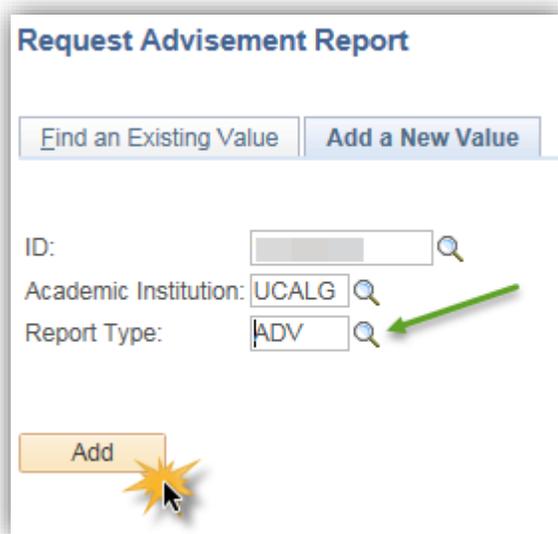
6. Note: The report type will always be ADV. You can enter it directly or select it. **Tip:** Add ADV to Report Type in Setup SACR > User Defaults > User Defaults 4 tab. Click the [ADV Academic Advisement Report](#) link.



The screenshot shows a 'Look Up Report Type' dialog box. It contains fields for 'User ID', 'Academic Institution' (set to 'UCALG'), 'Transcript Type' (set to 'begins with'), and 'Description' (set to 'begins with'). Below these fields are buttons for 'Look Up', 'Clear', and 'Cancel', along with a 'Basic Lookup' link. A 'Search Results' section shows a table with one entry: 'ADV' under 'Transcript Type' and 'Academic Advisement Report' under 'Description'. A mouse cursor is pointing at the 'ADV' entry.

7. Click the **Add** button.

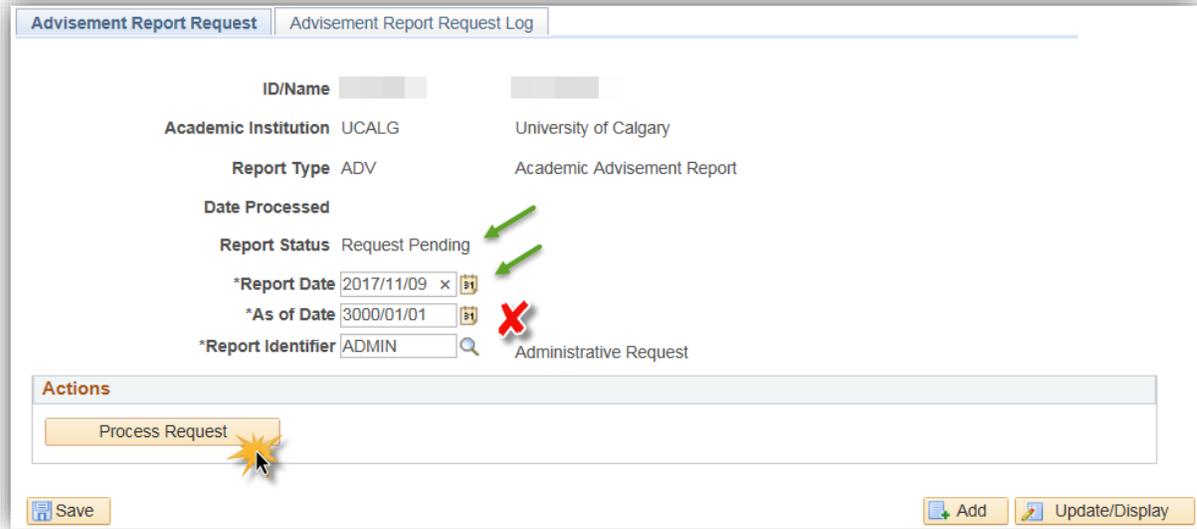
Add



The screenshot shows a 'Request Advisement Report' form. It has two buttons at the top: 'Find an Existing Value' and 'Add a New Value'. Below are three input fields: 'ID:', 'Academic Institution: UCALG', and 'Report Type: ADV'. Each field has a magnifying glass icon. A green arrow points to the 'ADV' value in the 'Report Type' field. At the bottom left is an 'Add' button with a mouse cursor clicking it.

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.

Process Request



Advisement Report Request | Advisement Report Request Log

ID/Name [] []

Academic Institution UCALG University of Calgary

Report Type ADV Academic Advisement Report

Date Processed

Report Status Request Pending

*Report Date 2017/11/09

*As of Date 3000/01/01

*Report Identifier ADMIN Administrative Request

Actions

Process Request

Save Add Update/Display

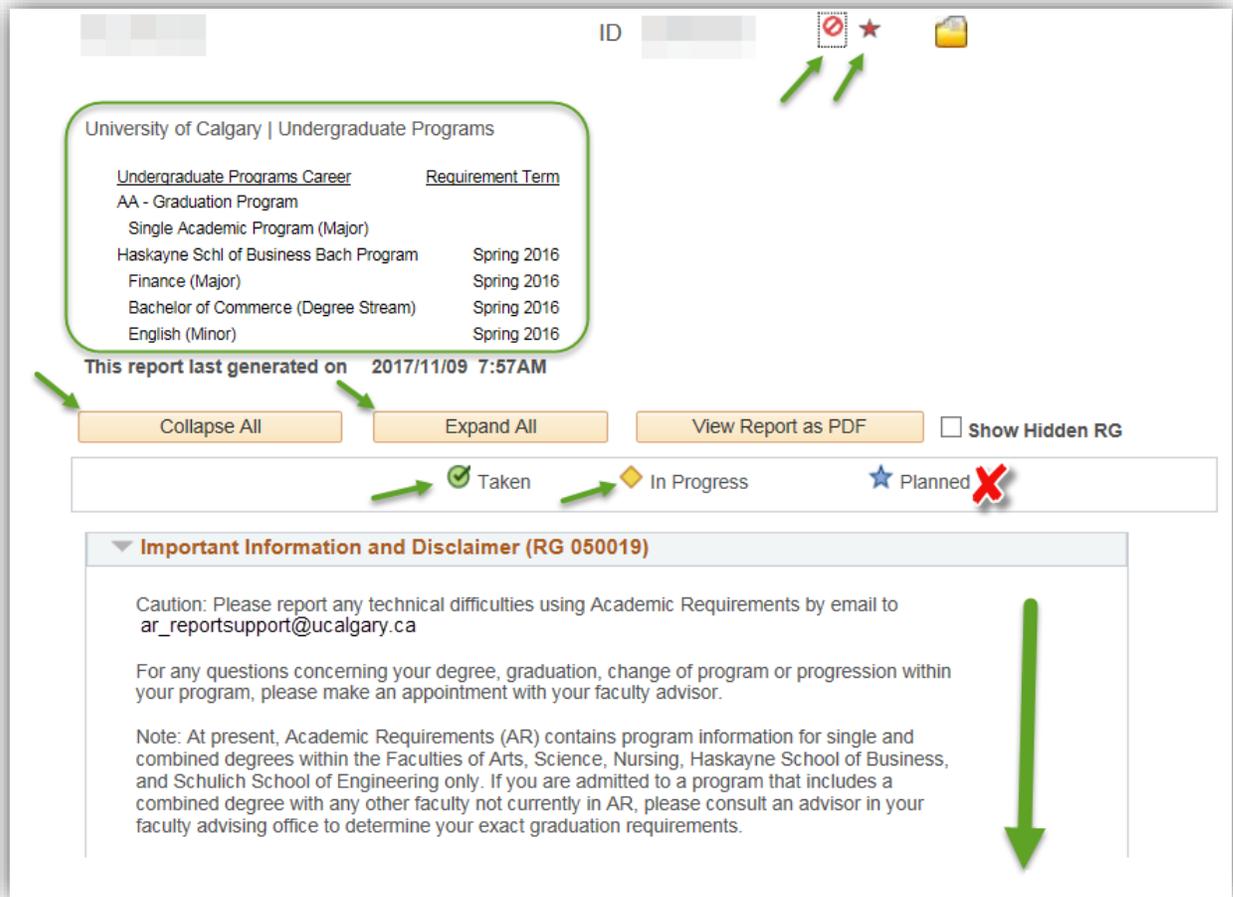
- The Academic Requirements Report will display the student name and ID and any service indicators. The student program and the Academic Calendar regulation year (Requirement Term e.g. Spring 2016).

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.

Senior Academic Advising

SA - Advising



University of Calgary | Undergraduate Programs

<u>Undergraduate Programs Career</u>	<u>Requirement Term</u>
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

Show Hidden RG

Taken In Progress Planned

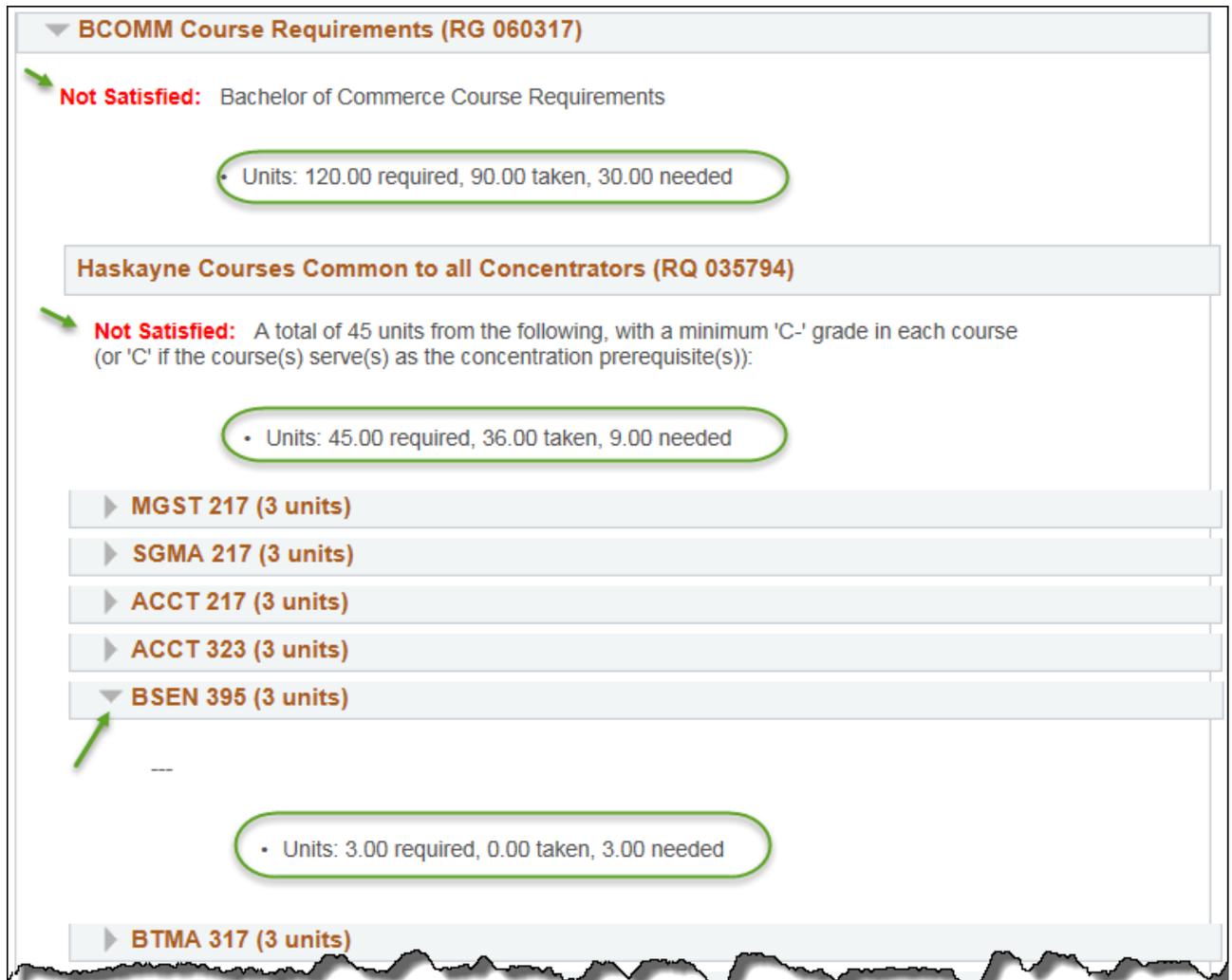
Important Information and Disclaimer (RG 050019)

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.

- 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.



▼ **BCOMM Course Requirements (RG 060317)**

➔ **Not Satisfied:** Bachelor of Commerce Course Requirements

- Units: 120.00 required, 90.00 taken, 30.00 needed

Haskayne Courses Common to all Concentrators (RQ 035794)

➔ **Not Satisfied:** A total of 45 units from the following, with a minimum 'C-' grade in each course (or 'C' if the course(s) serve(s) as the concentration prerequisite(s)):

- Units: 45.00 required, 36.00 taken, 9.00 needed

- ▶ **MGST 217 (3 units)**
- ▶ **SGMA 217 (3 units)**
- ▶ **ACCT 217 (3 units)**
- ▶ **ACCT 323 (3 units)**
- ▼ **BSEN 395 (3 units)**

- Units: 3.00 required, 0.00 taken, 3.00 needed

- ▶ **BTMA 317 (3 units)**

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.

▼ 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.

Disclaimer: Academic Requirements is designed to help students make informed decisions regarding their academic programs. Every effort has been made to ensure that the information contained in Academic Requirements conforms with the official degree requirements as stated in The University of Calgary Calendar. However, Academic Requirements should be used in conjunction with the Calendar and with advice from an advisor in the appropriate faculty advising office, particularly by those students nearing graduation.

The University of Calgary makes no representation, either expressed or implied, about the suitability of this software and shall not be liable for any damages suffered as a result of using this software.

▼ Haskayne School of Business Degree Audit Information (RQ 051138)

The online University of Calgary Academic Calendar contains the official Bachelor of Commerce (BComm) requirements and takes precedence over this degree audit tool. It is your responsibility to be aware of all Academic Calendar regulations associated with the BComm program and courses, and to seek advice early on and often from the Haskayne Undergraduate Office (SH343), with regards to registration suitability and degree progression. Additional requirements will apply to an enhanced program (e.g. combined degree, after degree, minor field).

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.

▼ **BCOMM Course Requirements (RG 060317)**

Not Satisfied: Bachelor of Commerce Course Requirements

- Units: 120.00 required, 90.00 taken, 30.00 needed

Haskayne Courses Common to all Concentrators (RQ 035794)

Not Satisfied: A total of 45 units from the following, with a minimum 'C-' grade in each course (or 'C' if the course(s) serve(s) as the concentration prerequisite(s)):

- Units: 45.00 required, 36.00 taken, 9.00 needed

- ▶ MGST 217 (3 units)
- ▶ SGMA 217 (3 units)
- ▶ ACCT 217 (3 units)
- ▶ ACCT 323 (3 units)
- ▶ BSEN 395 (3 units)
- ▶ BTMA 317 (3 units)
- ▶ ENTI 317 (3 units)
- ▶ FNCE 317 (3 units)
- ▶ MGST 391 (3 units)
- ▶ MKTG 317 (3 units)
- ▶ OBHR 317 (3 units)

17. Note the Concentration in Finance has not been satisfied; 12.00 units are still needed. Click the **Expand section** link.

Concentration in Finance (RQ 029576)

Not Satisfied: A total of 18 units from the following, with a minimum 'C-' grade in each course:

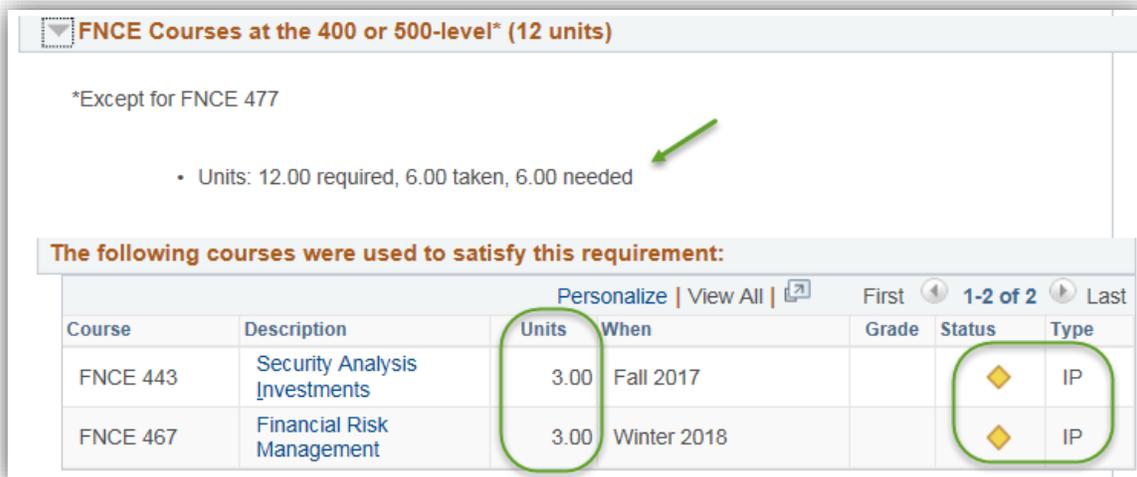
- Units: 18.00 required, 6.00 taken, 12.00 needed

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



A screenshot of a requirement group for FNCE 451 (3 units). The requirement is currently collapsed. A green arrow points from the 'Collapse section' link to the text 'Units: 3.00 required, 0.00 taken, 3.00 needed', where the number '3.00' is circled in green.

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.

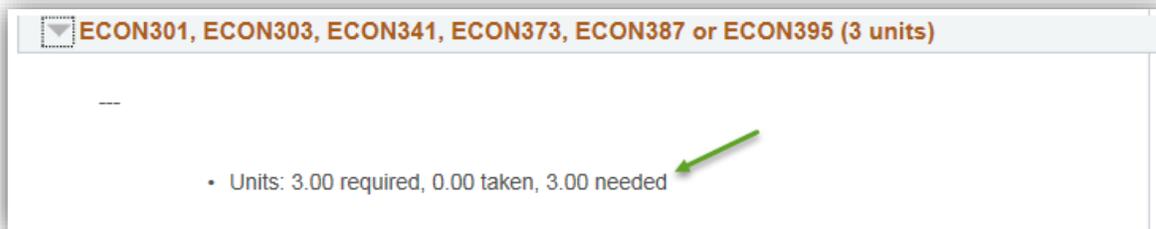


A screenshot of a requirement group for FNCE Courses at the 400 or 500-level* (12 units). The requirement is expanded. A green arrow points to the text 'Units: 12.00 required, 6.00 taken, 6.00 needed'. Below this, a table lists the courses used to satisfy the requirement:

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

The 'Units' column and the 'Status' and 'Type' columns for both courses are circled in green.

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.



A screenshot of a requirement group for ECON301, ECON303, ECON341, ECON373, ECON387 or ECON395 (3 units). The requirement is currently collapsed. A green arrow points to the text '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.

Senior Options (RQ 051003)

Not Satisfied: Additional units, as specified, at the Senior (300 or higher) level from the following:

Senior Commerce or Non-Commerce Options (9 units)

- Units: 9.00 required, 0.00 taken, 9.00 needed 

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).

English Minor (RG 022870)

English Minor Program Requirements

The department strongly encourages all English Minors, particularly those planning to enter the teaching profession, to take at least one course at the 400 level or above.

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 taken, 6.00 needed 

- ▶ **Foundation Program**
- ▶ **Foundation Program**
- ▶ **ENGL205, ENGL311**
- ▶ **Field of English**

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.

▼ **Foundation Program**

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

• Units: 6.00 required, 6.00 taken, 0.00 needed

The following courses may be used to satisfy this requirement:

Personalize | View All | [?]							First	1-6 of 6	Last
Course	Description	Units	When	Grade	Status	Type			
ENGL 302B	Intro Contemporary Theory	6.00	Winter 2018		◆	IP			
ENGL 303	View Course Details								
ENGL 481	Literary Theory Pre-1900	3.00							
ENGL#426	View Course Details								
ENGL#515	View Course Details								
ENGL#517	View Course Details								

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.

► **Foundation Program**

▼ **Foundation Program**

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

• Units: 6.00 required, 6.00 taken, 0.00 needed

The following courses may be used to satisfy this requirement:

Personalize | View All | [?]							First	1-3 of 3	Last
Course	Description	Units	When	Grade	Status	Type			
ENGL 305	Literature Before 1700	3.00							
ENGL 307	Literature After 1700	3.00							
ENGL 340B	Lit in Engl Middle Ages Pres	6.00	Winter 2017		✓	EN			

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

▼ **ENGL205, ENGL311**

Not Satisfied: Min 3 units from ENGL205, ENGL311

- Units: 3.00 required, 0.00 taken, 3.00 needed

The following courses may be used to satisfy this requirement:

Personalize | View All | [?]							
Course	Description	Units	When	Grade	Status	Type	
ENGL 205	Foundations: Shakespeare	3.00					
ENGL 311	Shakespeare and Performance	3.00					

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.

▼ **Field of English**

Not Satisfied: Min 15 units from the field of English

- Units: 15.00 required, 12.00 taken, 3.00 needed

The following courses may be used to satisfy this requirement:

Personalize | View All | [?]							
Course	Description	Units	When	Grade	Notes	Status	Type
ENGL	View Course Details						
ENGL 201	Approaches to Literature	3.00	Fall 2015			✓	EN
ENGL 265	Introductory Creative Writing	3.00	Winter 2016			✓	EN
ENGL 395	Speculative Fiction II: Fantasy	3.00	Fall 2017			◆	IP
ENGL 399	Detective Fiction	3.00	Winter 2018			◆	IP
LING 381	(ENGL381) TheHistoryofEnglish	3.00					

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.

BCOMM Summary of Applied Courses (RG 060246)

Courses counting towards the BComm course requirements and, where applicable, language proficiency and/or the Co-op program: 

 **Course Requirements (RQ 051129)**

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.

The following courses may be used to satisfy this requirement:

Personalize | View 10 | First 1-28 of 28 Last							
Course	Description	Units	When	Grade	Status	Type	
ACCT 217	Introductory Financial Acct	3.00	Fall 2016			EN	<div style="border: 1px solid green; padding: 5px; margin-bottom: 10px;"> Courses taken (green circle) </div> <div style="border: 1px solid green; padding: 5px;"> Courses in progress (yellow diamond) </div>
ACCT 323	Introductory Managerial Acct	3.00	Spring 2017			EN	
ASTR 209	Intro To Astr II - The Cosmos	3.00	Winter 2016			EN	
BTMA 317	Intro Business Technology Mgmt	3.00	Winter 2018			IP	
ECON 201	Principles Of Microeconomics	3.00	Fall 2015			EN	
ECON 203	Principles Of Macroeconomics	3.00	Winter 2016			EN	
ENGL 201	Approaches to Literature	3.00	Fall 2015			EN	
ENGL 265	Introductory Creative Writing	3.00	Winter 2016			EN	
ENGL 302B	Intro Contemporary Theory	6.00	Winter 2018			IP	
ENGL 340B	Lit in Engl Middle Ages Pres	6.00	Winter 2017			EN	
ENGL 395	Speculative Fiction II:Fantasy	3.00	Fall 2017			IP	
ENGL 399	Detective Fiction	3.00	Winter 2018			IP	
ENTI 317	Entrepreneurial Thinking	3.00	Fall 2017			IP	
FNCE 317	Financial Management	3.00	Winter 2017			EN	
FNCE 443	Security Analysis Investments	3.00	Fall 2017			IP	
FNCE 467	Financial Risk Management	3.00	Winter 2018			IP	
GRST 209	ClassicalMythologyLiterature	3.00	Fall 2016			EN	
HROD 317	Organizational Behaviour	3.00	Fall 2016			EN	
MATH 265	University Calculus I	3.00	Fall 2015			EN	
MGST 217	Intro to Business Analytics	3.00	Winter 2016			EN	
MGST 391	Business Analytics	3.00	Fall 2016			EN	
MGST 451	Corp Gov & Ethical Dec-Making	3.00	Spring 2017			EN	

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.

▼ **BCOMM Unused Courses (RG 060250)**

Courses not applied towards the BComm degree requirements:

▼ **Repeats / Not for Credit / 1xx Levels / F and W Grades (RQ 051013)**

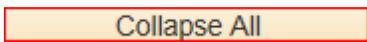
The following courses were used to satisfy this requirement:

Personalize | View All |							First 	1-2 of 2 	Last
Course	Description	Units	When	Grade	Status	Type			
ACCT 217	Introductory Financial Acct	3.00	Winter 2016			EN			
ECON 373	GameTheorStratThinkForSosc	3.00	Summer 2017	W		EN			

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.



Page 1 of 9

UNIVERSITY OF
CALGARY

Academic Advisement Report
For [REDACTED] prepared on 11/09/2017

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

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.

Disclaimer: Academic Requirements (AR) is a tool used to assist students in determining their academic requirements. Every effort has been made to ensure that the information provided in AR conforms with the official degree requirements. AR should be used in conjunction with the Calendar and with advice from an advisor in the appropriate faculty advising office, particularly by those students nearing graduation.



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

Senior Academic Advising

SA - Advising



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

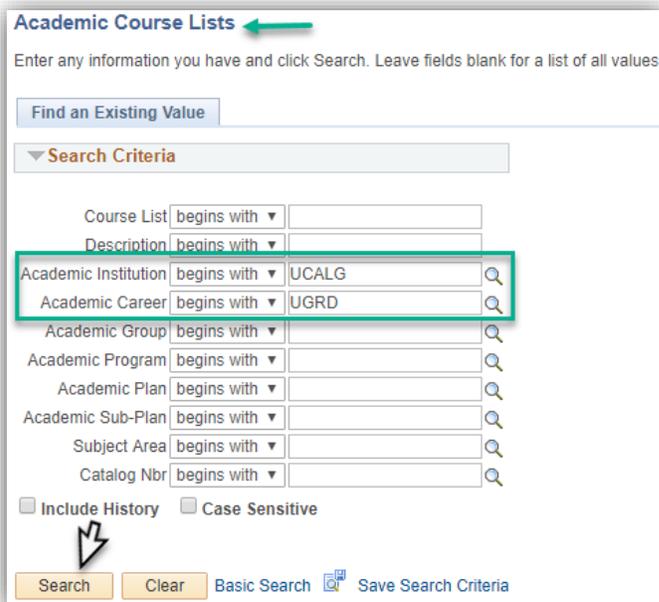
Maintaining Area Course Lists - Academic Advising Summary Screen

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.



Academic Course Lists ←

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

[Find an Existing Value](#)

▼ **Search Criteria**

Course List	begins with ▼		
Description	begins with ▼		
Academic Institution	begins with ▼	UCALG	🔍
Academic Career	begins with ▼	UGRD	🔍
Academic Group	begins with ▼		🔍
Academic Program	begins with ▼		🔍
Academic Plan	begins with ▼		🔍
Academic Sub-Plan	begins with ▼		🔍
Subject Area	begins with ▼		🔍
Catalog Nbr	begins with ▼		🔍

Include History Case Sensitive

⚡

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

3. Select the desired list and click on it.

Search Results 

Only the first 300 results can be displayed.

View All First 1-100 of 300 Last

Course List	Description	Academic Institution	Academic Career	Academic Group	Academic Program	Academic Plan	Academic Sub-Plan	Subject Area	Catalog Nbr
000000001	Communication & Culture Area I	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
000000002	Communication & Culture Area II	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
000000003	Communication & Culture Area III	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
000000004	Communication & Culture Area IV	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
000000005	UPO UNGROUPED	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
000000006	Humanities Area I	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
000000007	Humanities Area II	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
000000008	Humanities Area III	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
000000009	Humanities Area IV	UCALG	UGRD	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)

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.

Course List Summary

Find | View All 1 of 1

000000001 Communication & Culture Area I Effective Date 1901/01/01 **Fetch** 

Courses Used Find 1 of 1

Return to Search Previous in List Next in List Notify Update/Display Include History

5. Click the **Fetch** button to retrieve the existing course list.

Course List Summary 

Find | View All 1 of 1

000000001 Communication & Culture Area I Effective Date 1901/01/01 **Fetch**

Courses Used Find 1-2 of 2

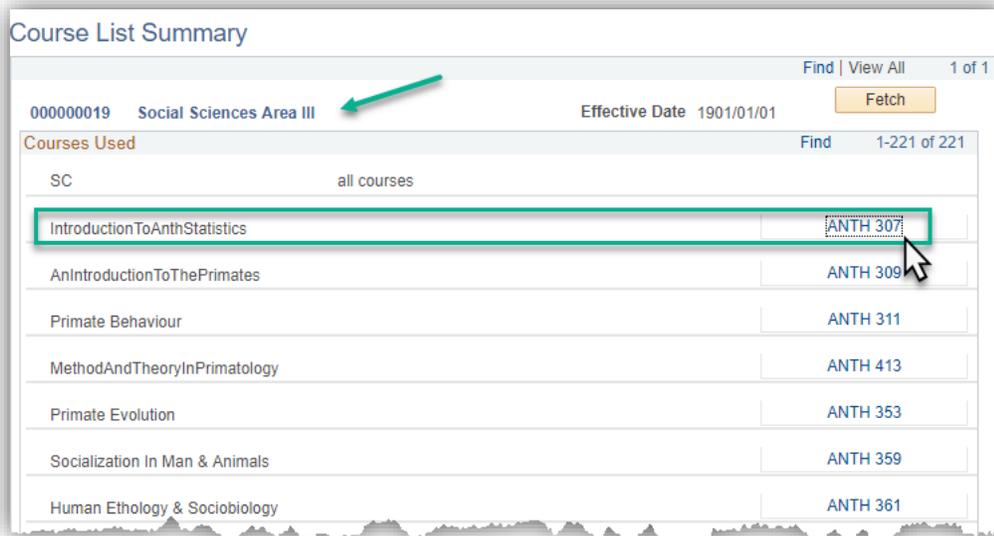
HU

ETAS

Return to Search Previous in List Next in List Notify Update/Display Include History

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.

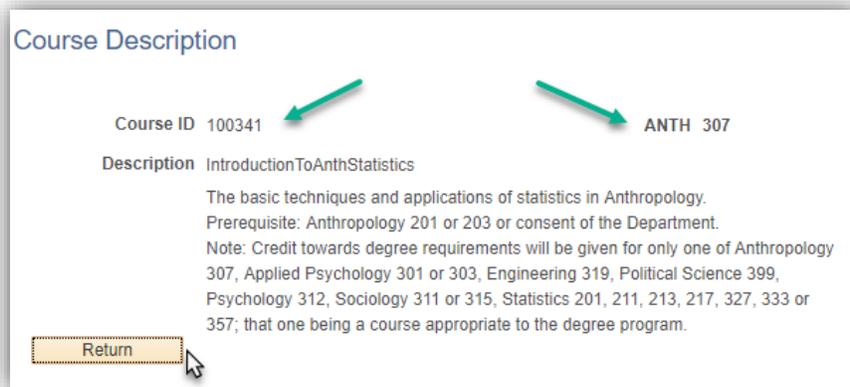


Course List Summary

00000019 Social Sciences Area III Effective Date 1901/01/01 [Fetch](#)

Courses Used Find 1-221 of 221

SC	all courses
IntroductionToAnthStatistics	ANTH 307
AnIntroductionToThePrimates	ANTH 309
Primate Behaviour	ANTH 311
MethodAndTheoryInPrimatology	ANTH 413
Primate Evolution	ANTH 353
Socialization In Man & Animals	ANTH 359
Human Ethology & Sociobiology	ANTH 361



Course Description

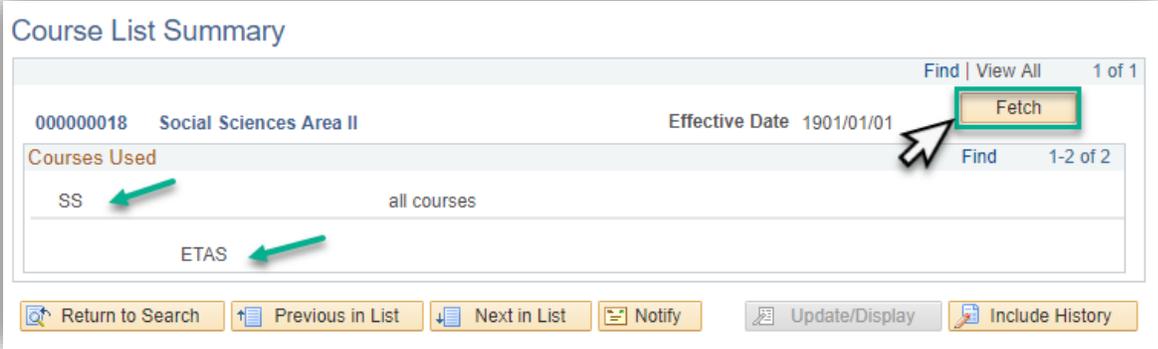
Course ID 100341 **ANTH 307**

Description IntroductionToAnthStatistics

The basic techniques and applications of statistics in Anthropology.
 Prerequisite: Anthropology 201 or 203 or consent of the Department.
 Note: Credit towards degree requirements will be given for only one of Anthropology 307, Applied Psychology 301 or 303, Engineering 319, Political Science 399, Psychology 312, Sociology 311 or 315, Statistics 201, 211, 213, 217, 327, 333 or 357; that one being a course appropriate to the degree program.

[Return](#)

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.



Course List Summary

Find | View All 1 of 1

000000018 Social Sciences Area II Effective Date 1901/01/01 Fetch

Courses Used Find 1-2 of 2

SS ←

ETAS ←

Return to Search Previous in List Next in List Notify Update/Display Include History

Note:

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

Define Academic Summary Areas

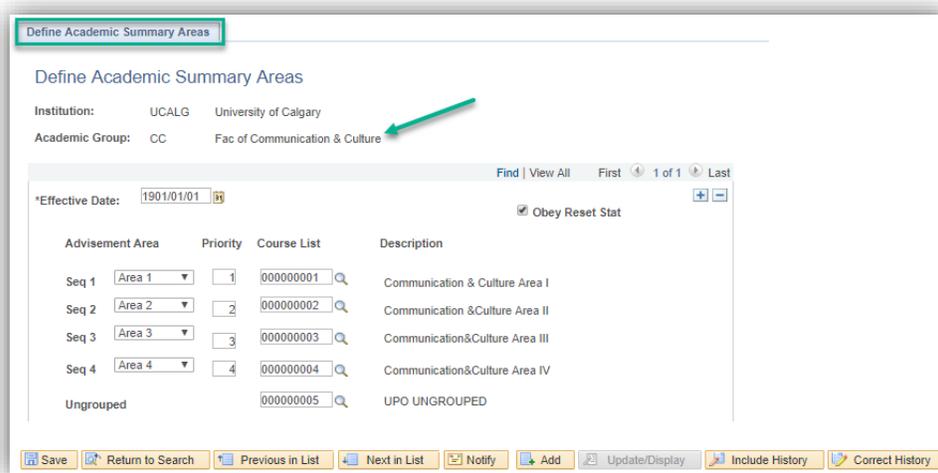
Navigation: [Academic Advisement](#) > [Advising Setup](#) > [Define Academic Summary Areas](#)

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.

Senior Academic Advising

SA - Advising



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
UCALG	AR	18	ASC NODC Lin

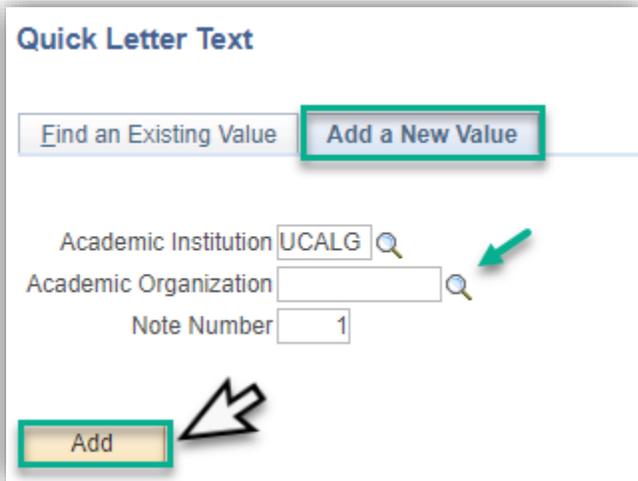
Note:

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**.



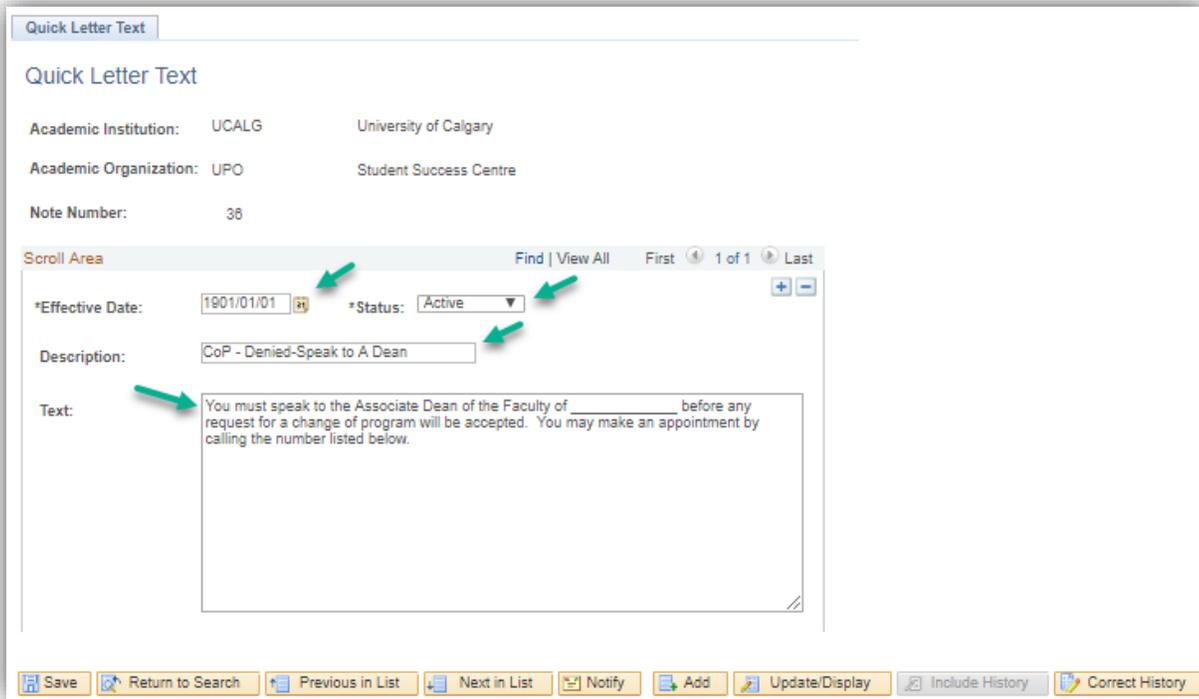
Quick Letter Text

Academic Institution

Academic Organization

Note Number

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**.



Quick Letter Text

Academic Institution: UCALG University of Calgary
Academic Organization: UPO Student Success Centre
Note Number: 38

Scroll Area Find | View All First 1 of 1 Last

*Effective Date: 1901/01/01 *Status: Active

Description: CoP - Denied-Speak to A Dean

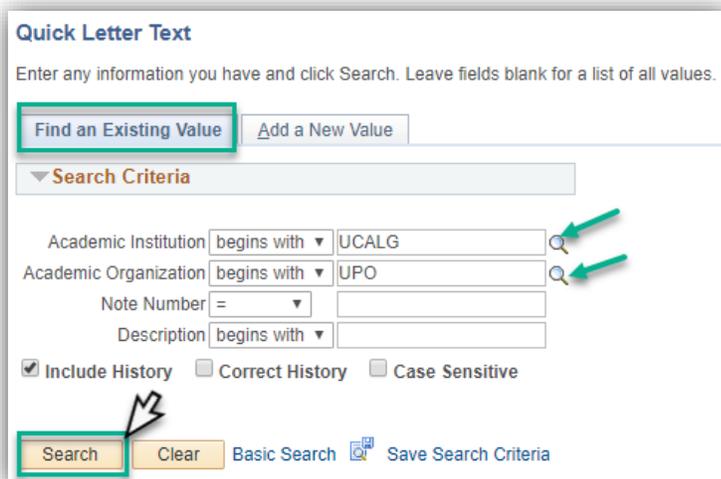
Text: You must speak to the Associate Dean of the Faculty of _____ before any request for a change of program will be accepted. You may make an appointment by calling the number listed below.

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

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.



Quick Letter Text

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

Find an Existing Value Add a New Value

Search Criteria

Academic Institution begins with UCALG

Academic Organization begins with UPO

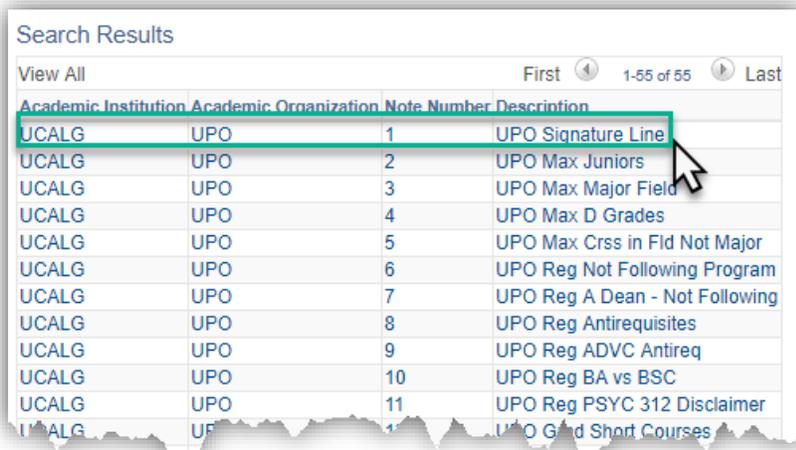
Note Number =

Description begins with

Include History Correct History Case Sensitive

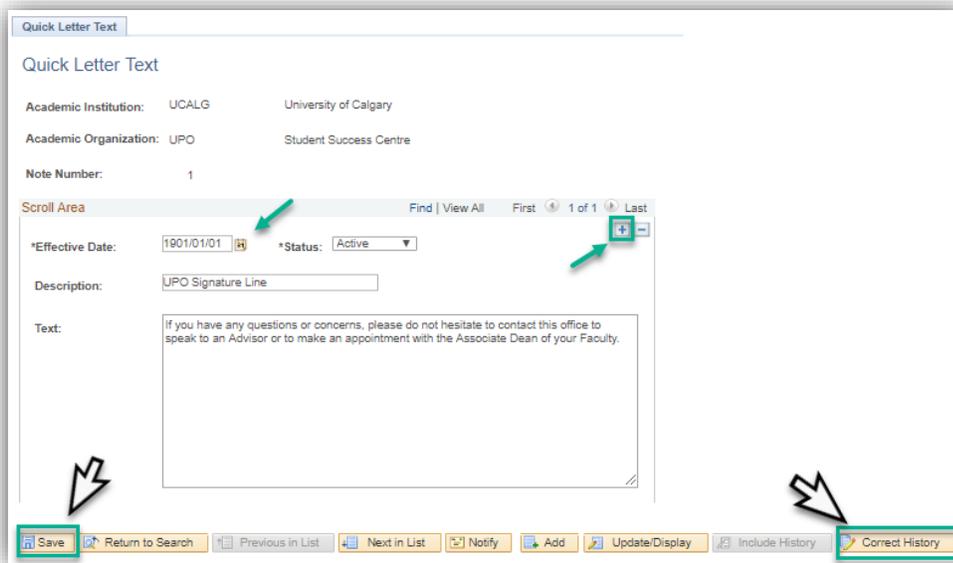
Search Clear Basic Search Save Search Criteria

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



Academic Institution	Academic Organization	Note Number	Description
UCALG	UPO	1	UPO Signature Line
UCALG	UPO	2	UPO Max Juniors
UCALG	UPO	3	UPO Max Major Field
UCALG	UPO	4	UPO Max D Grades
UCALG	UPO	5	UPO Max Crss in Fid Not Major
UCALG	UPO	6	UPO Reg Not Following Program
UCALG	UPO	7	UPO Reg A Dean - Not Following
UCALG	UPO	8	UPO Reg Antirequisites
UCALG	UPO	9	UPO Reg ADVC Antireq
UCALG	UPO	10	UPO Reg BA vs BSC
UCALG	UPO	11	UPO Reg PSYC 312 Disclaimer
UCALG	UPO	12	UPO Good Short Courses

The Quick Letter Text page will display.



Quick Letter Text

Academic Institution: UCALG University of Calgary
 Academic Organization: UPO Student Success Centre
 Note Number: 1

Scroll Area Find | View All First 1 of 1 Last

*Effective Date: 1901/01/01 *Status: Active

Description: UPO Signature Line

Text:
 If you have any questions or concerns, please do not hesitate to contact this office to speak to an Advisor or to make an appointment with the Associate Dean of your Faculty.

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History **Correct History**

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.*

Senior Academic Advising

SA - Advising



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

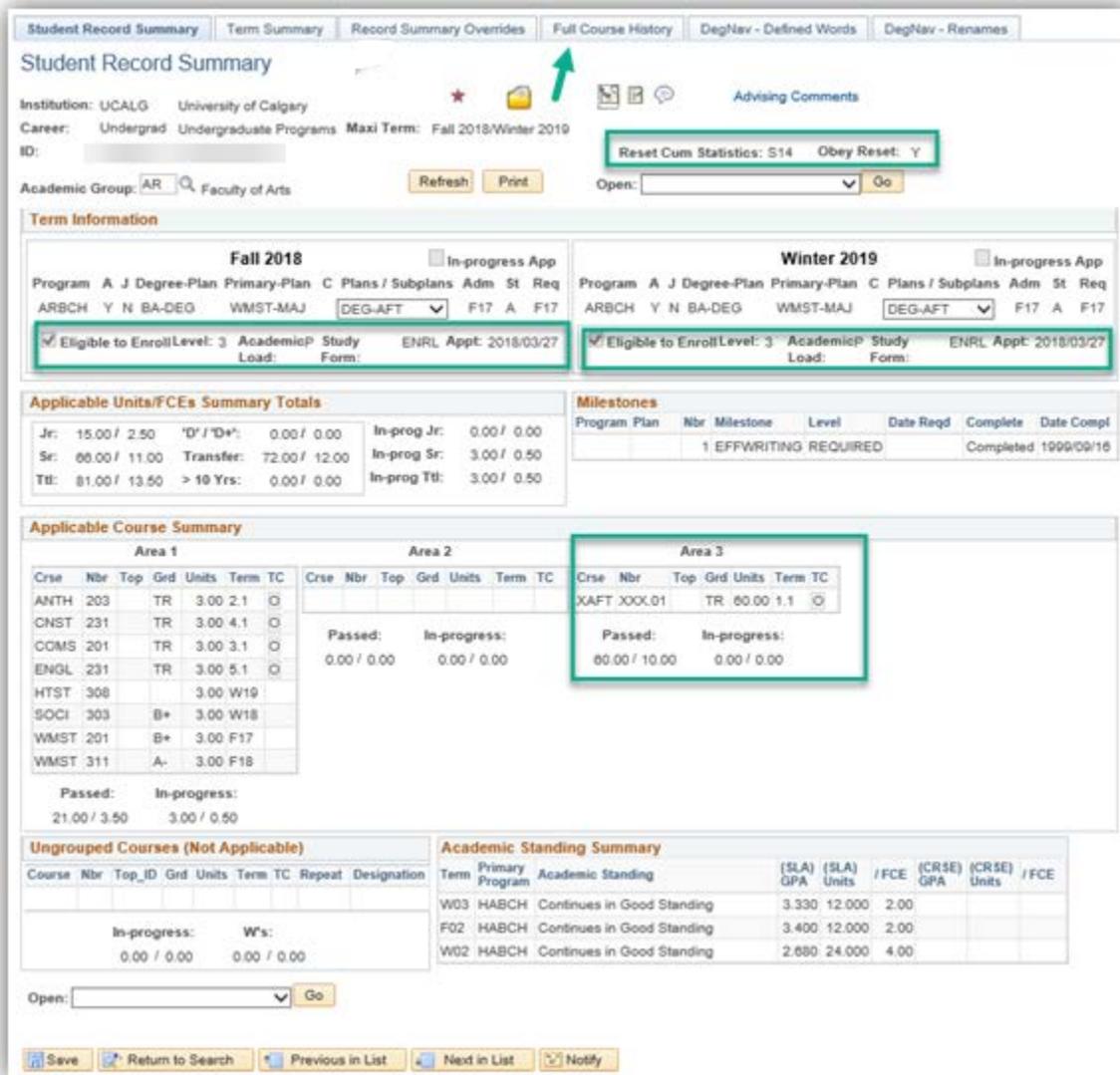
You and the student will see ALL the courses the student has ever completed, as well as the transfer credits assessed for their first degree on the Student Record Summary Screen.

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.



Student Record Summary

Institution: UCALG University of Calgary
 Career: Undergrad Undergraduate Programs Maxi Term: Fall 2018/Winter 2019
 ID: [Redacted]
 Academic Group: AR Faculty of Arts

Reset Cum Statistics: S14 Obey Reset: Y

Term Information

Fall 2018 In-progress App
 Program A J Degree-Plan Primary-Plan C Plans / Subplans Adm St Req
 ARBCH Y N BA-DEG WMST-MAJ DEG-AFT F17 A F17
 Eligible to Enroll Level: 3 AcademicP Study ENRL Appt: 2018/03/27
 Load: Form:

Winter 2019 In-progress App
 Program A J Degree-Plan Primary-Plan C Plans / Subplans Adm St Req
 ARBCH Y N BA-DEG WMST-MAJ DEG-AFT F17 A F17
 Eligible to Enroll Level: 3 AcademicP Study ENRL Appt: 2018/03/27
 Load: Form:

Applicable Units/FCEs Summary Totals

Jr:	15.00 / 2.50	'D'/'D*':	0.00 / 0.00	In-prog Jr:	0.00 / 0.00
Sr:	86.00 / 11.00	Transfer:	72.00 / 12.00	In-prog Sr:	3.00 / 0.50
Ttl:	81.00 / 13.50	> 10 Yrs:	0.00 / 0.00	In-prog Ttl:	3.00 / 0.50

Milestones

Program Plan	Nbr	Milestone	Level	Date Reqd	Complete	Date Compl
	1	EFFWRITING REQUIRED			Completed	1999/09/16

Applicable Course Summary

Area 1							Area 2							Area 3							
Crse	Nbr	Top	Grd	Units	Term	TC	Crse	Nbr	Top	Grd	Units	Term	TC	Crse	Nbr	Top	Grd	Units	Term	TC	
ANTH	203		TR	3.00	2.1	○								XAFT	XXX.01		TR	60.00	1.1	○	
CNST	231		TR	3.00	4.1	○															
CGMS	201		TR	3.00	3.1	○															
ENGL	231		TR	3.00	5.1	○															
HTST	308			3.00	W19																
SOCI	303		B+	3.00	W18																
WMST	201		B+	3.00	F17																
WMST	311		A-	3.00	F18																
Passed:		In-progress:																			
21.00 / 3.50		3.00 / 0.50																			

Ungrouped Courses (Not Applicable)

Course Nbr	Top_ID	Grd	Units	Term	TC	Repeat	Designation
In-progress:		W's:					
0.00 / 0.00		0.00 / 0.00					

Academic Standing Summary

Term	Primary Program	Academic Standing	(SLA) GPA	(SLA) Units	/ FCE	(CRSE) GPA	(CRSE) Units	/ FCE
W03	HABCH	Continues in Good Standing	3.330	12.000	2.00			
F02	HABCH	Continues in Good Standing	3.400	12.000	2.00			
W02	HABCH	Continues in Good Standing	2.680	24.000	4.00			

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.

Senior Academic Advising

SA - Advising



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.*

* Group	* Seq#	Status	Other Credit	Equivalent Subject / Catlg Nbr
1	1	Posted	AFTER DEGREE CREDITS	XAFT XXX.01
2	1	Posted	ANTH 203	ANTH 203
3	1	Posted	COMS 201	COMS 201
4	1	Posted	CNST 231	CNST 231
5	1	Posted	ENGL 231	ENGL 231

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](#)

Equivalent Course Information

Other Credit

Other Credit	After Degree Credits	Short Desc	After Degr
Long Description	After Degree Credits		
Other Credit Type	After Degree	Evaluation Date	2018/06/07

Equivalent Course

Course ID	090010	After Degree Credit	
Offer Nbr	1	XAFT	XXX.01
Units Transferred	36.000	<input checked="" type="checkbox"/> Valid Attempt	
Grading Scheme	UGD	<input checked="" type="checkbox"/> Earn Credit	
Grading Basis	TRN	<input type="checkbox"/> Include in GPA	
Official Grade	TR	Grd Pt/Unt	1.700
Repeat Code		Units Att	Yes
Designation	<input type="text"/>		
	<input type="checkbox"/> Include in FA WI Stats		

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.

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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.**

Student Record Summary

Institution: UCALG University of Calgary
Career: Undergrad Undergraduate Programs Maxi Term: Fall 2019/Winter 2020
ID: [Redacted]
Reset Cum Statistics: Obey Reset: N
Academic Group: HA Haskayne School of Business
Open: Credit, Other / Manual Go

Term Information

Fall 2019 In-progress App
Program A J Degree-Plan Primary-Plan C Plans / Subplans Adm St Req
HABCH N BCOMM-DEGGENL-MAJ F17 A F17
Eligible to Enroll Level: 5 Academic Load: Study Form: ENRL Appt: 2019/03/25

Winter 2020 In-progress App
Program A J Degree-Plan Primary-Plan C Plans / Subplans Adm St Req
HABCH N BCOMM-DEGGENL-MAJ F17 A F17
Eligible to Enroll Level: 5 Academic Load: Study Form: ENRL Appt: 2019/03/25

Applicable Units/FCEs Summary Totals

Jr:	39.00 / 6.50	'D' / 'D+':	3.00 / 0.50	In-prog Jr:	0.00 / 0.00
Sr:	54.00 / 9.00	Transfer:	39.00 / 6.50	In-prog Sr:	9.00 / 1.50
Ttl:	93.00 / 15.50	> 10 Yrs:	0.00 / 0.00	In-prog Ttl:	9.00 / 1.50

Applicable Course Summary

Jr. Non HA							SR. Non HA							HA												
Crse	Nbr	Top	Grd	Units	Term	TC	Crse	Nbr	Top	Grd	Units	Term	TC	Crse	Nbr	Top	Grd	Units	Term	TC						
ECON	201		B	3.00	F16		OPTN	9XX		TR	21.00	4.1	○	ACCT	217		C	3.00	F17							
ECON	203		B+	3.00	W17		SOSC	9XX		TR	6.00	7.1	○	ACCT	323		C	3.00	W18							
ENGL	201		B-	3.00	F16		Passed: 27.00 / 4.50							In-progress: 0.00 / 0.00												
MATH	249		TR	3.00	3.1	○																				
RELS	200		A	3.00	W17																					
SCIE	2XX		TR	6.00	5.1	○																				
SOCI	2XX		TR	3.00	6.1	○																				
STAT	213		C+	3.00	F16																					

Milestones

Program	Plan	Nbr	Milestone	Level	Date Reqd	Complete	Date Compl

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.

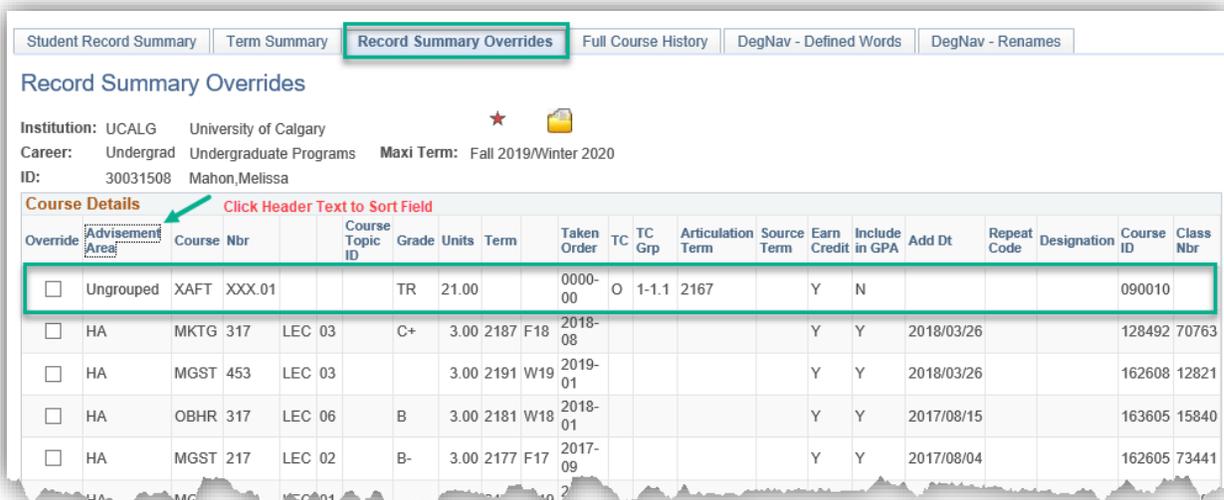
Preventing Courses from the First Degree from being used in the Second Degree

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.



Record Summary Overrides

Institution: UCALG University of Calgary ★ 

Career: Undergrad Undergraduate Programs **Maxi Term:** Fall 2019/Winter 2020

ID: 30031508 Mahon, Melissa

Course Details Click Header Text to Sort Field

Override	Advisement Area	Course Nbr	Course Topic ID	Grade	Units	Term	Taken Order	TC	TC Grp	Articulation Term	Source Term	Earn Credit	Include in GPA	Add Dt	Repeat Code	Designation	Course ID	Class Nbr
<input type="checkbox"/>	Ungrouped	XAFT XXX.01		TR	21.00		0000-00	O	1-1.1	2167		Y	N				090010	
<input type="checkbox"/>	HA	MKTG 317	LEC 03	C+	3.00	2187 F18	2018-08					Y	Y	2018/03/26			128492	70763
<input type="checkbox"/>	HA	MGST 453	LEC 03		3.00	2191 W19	2019-01					Y	Y	2018/03/26			162608	12821
<input type="checkbox"/>	HA	OBHR 317	LEC 06	B	3.00	2181 W18	2018-01					Y	Y	2017/08/15			163605	15840
<input type="checkbox"/>	HA	MGST 217	LEC 02	B-	3.00	2177 F17	2017-09					Y	Y	2017/08/04			162605	73441

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			LOW

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.

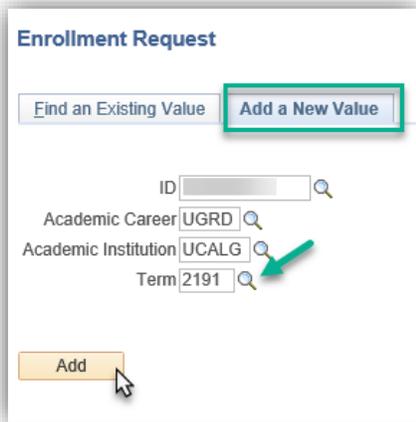
Situations that require manual correction will be reported on the Repeated Course Report (***included in this document***) which can be run for a term and for a specific faculty. When an error situation is reported for a student, it may involve one or more of the attempts for the same course.

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.



Enrollment Request

Find an Existing Value **Add a New Value**

ID

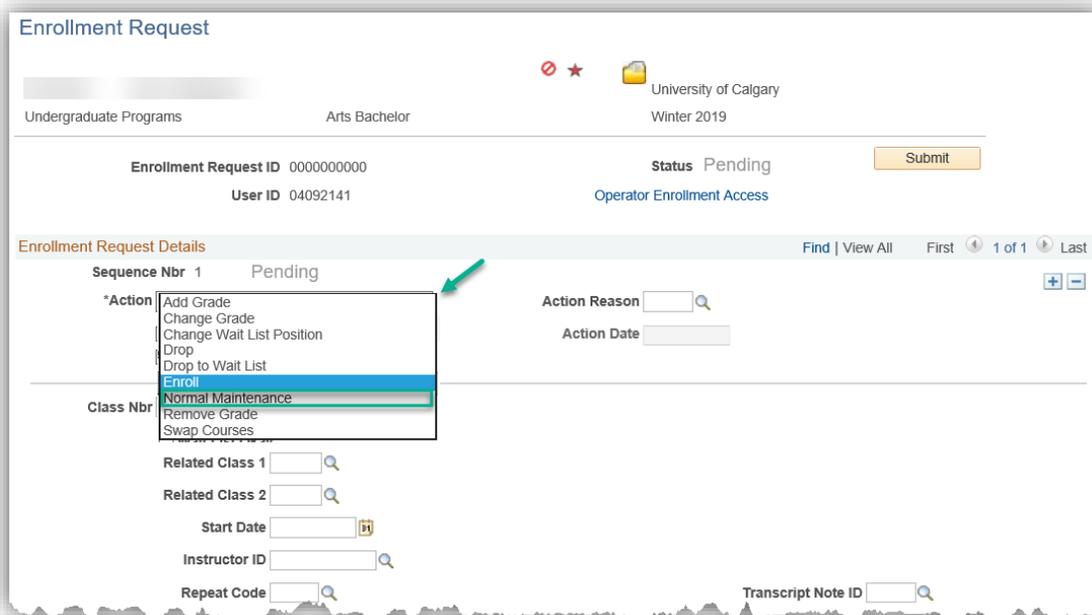
Academic Career

Academic Institution

Term

Add

3. Select the **Action** of “**Normal Maintenance**”



Enrollment Request

Undergraduate Programs Arts Bachelor University of Calgary Winter 2019

Enrollment Request ID 0000000000 Status Pending **Submit**

User ID 04092141 Operator Enrollment Access

Enrollment Request Details Find | View All First 1 of 1 Last

Sequence Nbr 1 Pending

*Action **Normal Maintenance**

Class Nbr

Related Class 1

Related Class 2

Start Date

Instructor ID

Repeat Code

Transcript Note ID

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

Enrollment Request

Undergraduate Programs Arts Bachelor University of Calgary
Winter 2019

Enrollment Request ID 0000000000 Status Pending

User ID 04092141 Operator Enrollment Access

Enrollment Request Details Find | View All First 1 of 1 Last

Sequence Nbr 1 Pending

*Action Action Reason

Override Action Date Action Date

Wait List Okay

Class Nbr

Related Class 1

Related Class 2

Instructor ID

Repeat Code

Transcript Note ID

Override

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

Enrollment Request

Enrollment Listing

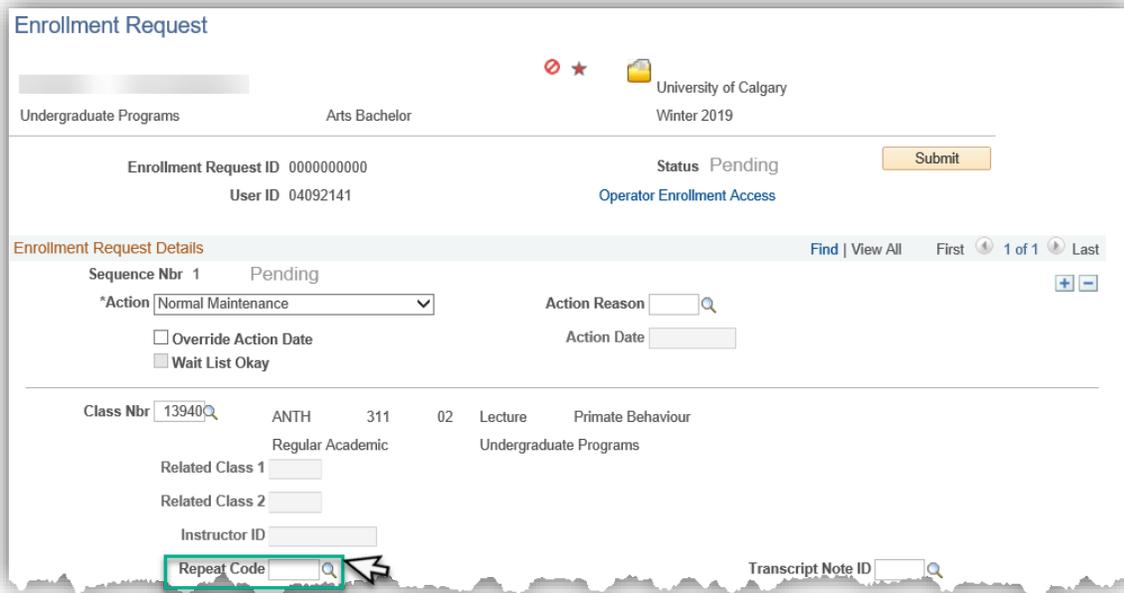
Request ID 0000000000 Institution: UCALG Term: W19

UGRD

Enrollment List Find First 1-5 of 5 Last

Subject	Catalog	Section	Unit Taken	Class Nbr	Status	Reason	Grading Basis	Grade	Session
<input checked="" type="checkbox"/> ANTH Lecture Primate Behaviour	311	02	3.00	13940	Enrolled	Enrolled	Graded		Regular Academic
<input checked="" type="checkbox"/> HTST Lecture The History Of Europe	201	02	3.00	14488	Enrolled	Enrolled	Graded		Block Week
<input type="checkbox"/> CMCL Lecture Contours of Contemp Culture	307	01	3.00	15315	Enrolled	Enrolled	Graded		Regular Academic
<input checked="" type="checkbox"/> CMCL Laboratory Contours of Contemp Culture	307	B01		15316	Enrolled	Enrolled	Non-Graded		Regular Academic

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.



Enrollment Request

Undergraduate Programs Arts Bachelor University of Calgary
Winter 2019

Enrollment Request ID 000000000 Status Pending
User ID 04092141 Operator Enrollment Access

Enrollment Request Details Find | View All First 1 of 1 Last

Sequence Nbr 1 Pending

*Action Action Reason
 Override Action Date Action Date
 Wait List Okay

Class Nbr ANTH 311 02 Lecture Primate Behaviour
Regular Academic Undergraduate Programs

Related Class 1
Related Class 2
Instructor ID
Repeat Code Transcript Note ID

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

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Look Up Repeat Code

Set ID UCALG
Repeat Scheme UGRD
Repeat Code begins with
Description begins with

[Basic Lookup](#)

[Help](#)

Search Results

View 100 First 1-9 of 9 Last

Repeat Code	Description
FSUP	Supplemental - Exam
HIGH	Higher Grade
LOW	Lower Grade
LRYP	Law Repeated Year
OHGH	Override High
OLOW	Override Low
OSUP	Supplemental - Original Enroll
OVRD	Override - Repeat Permitted
REPT	Repeated Course

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

Enrollment Request

Undergraduate Programs Arts Bachelor University of Calgary Winter 2019

Enrollment Request ID 0009933274 Status Success
User ID 04092141 [Operator Enrollment Access](#)

Enrollment Request Details

Sequence Nbr 1 Success Find | View All First 1 of 1 Last

*Action Normal Maintenance Action Reason

Override Action Date
 Wait List Okay

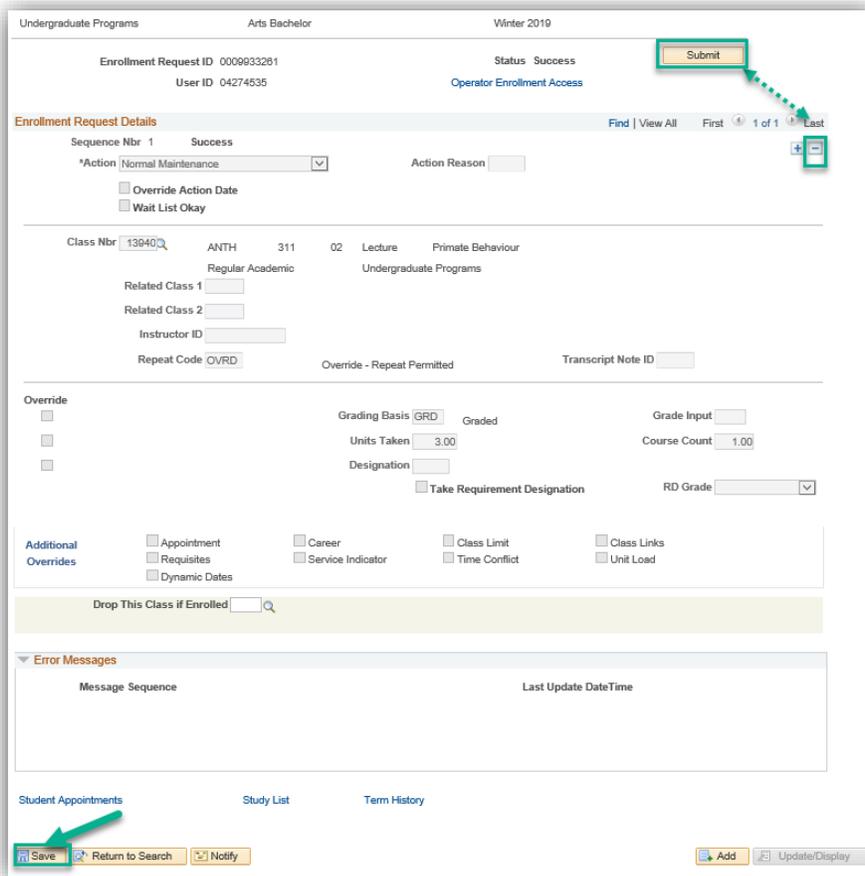
Class Nbr 13940 ANTH 311 02 Lecture Primate Behaviour
Regular Academic Undergraduate Programs

Related Class 1
Related Class 2
Instructor ID

Repeat Code OVRD Override - Repeat Permitted Transcript Note ID

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.



The screenshot displays the 'Enrollment Request Details' for a student. Key elements include:

- Enrollment Request ID:** 0009833261
- User ID:** 04274535
- Status:** Success
- Operator:** Enrollment Access
- Class Nbr:** 13940 (ANTH 311 02)
- Repeat Code:** OVRD
- Action:** Normal Maintenance
- Buttons:** 'Submit' (top right), 'Save' (bottom left), 'Return to Search', 'Notify', 'Add', and 'Update/Display'.
- Minus Sign:** A small minus sign icon is located next to the 'Last' page indicator, with a red arrow pointing to it from the 'Submit' button.

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	OHGH²

2nd example: -

	Grade	Repeat Code	Required Changes	Corrected Codes
First Attempt	(C)	LOW	Ok – no change	LOW
Second Attempt	(B)	HIGH	Ok – no change	HIGH²
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	OHGH²
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	OHGH²

Notes:

OHIGH 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 OHIGH 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.

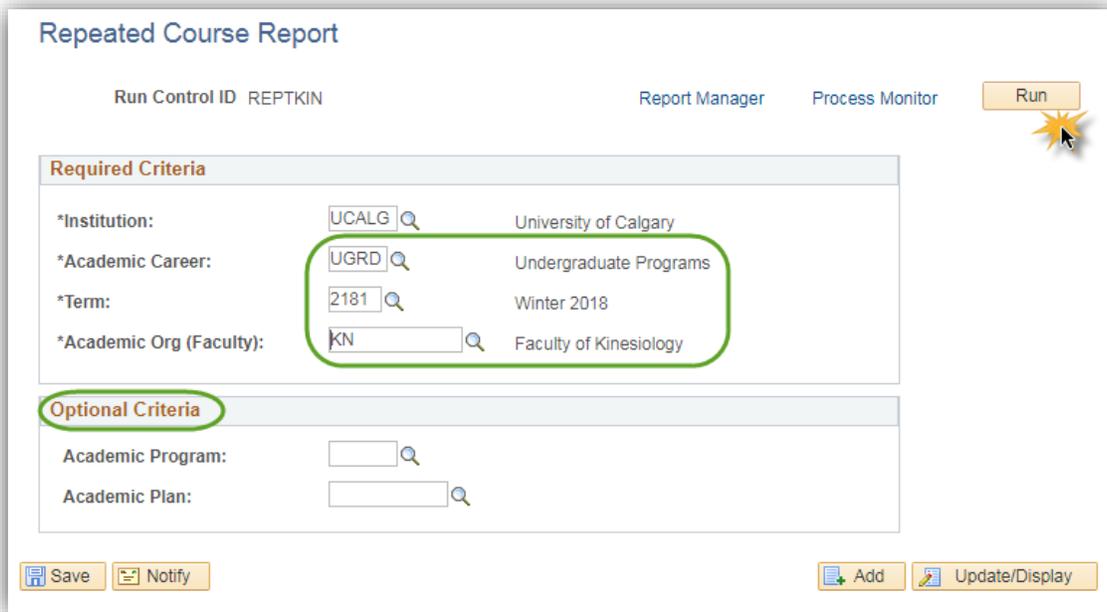
Identifying Repeat Code problems for students

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.



Repeated Course Report

Run Control ID REPTKIN Report Manager Process Monitor Run

Required Criteria

*Institution: UCALG University of Calgary

*Academic Career: UGRD Undergraduate Programs

*Term: 2181 Winter 2018

*Academic Org (Faculty): KN Faculty of Kinesiology

Optional Criteria

Academic Program:

Academic Plan:

Save Notify Add Update/Display

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 valid Program/Plan combination or the process may not be able to find any records to match your selection criteria.

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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:

Report ID: UCRGR001
Process Instance: 10061564
University of Calgary - Registration
Repeated Course Report
Page No. 1
Run Date 2018/03/16
Run Time 08:46:16

Repeat Code occurrences to Term: Winter 2018

Last Name	First Name	Student ID	Equivalent Course ID	Course ID	Term	Subject	Catalog Nbr	Class Section	Grade	Repeat Code
Student #1				104794	2157	CHEM	203	02	F	LOW
				104794	2167	CHEM	203	01	D	HIGH
				104794	2171	CHEM	203	03	C	OVRD
Student #2			161237	2167	ENGL	203	CRSE	B-	REPT	

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.

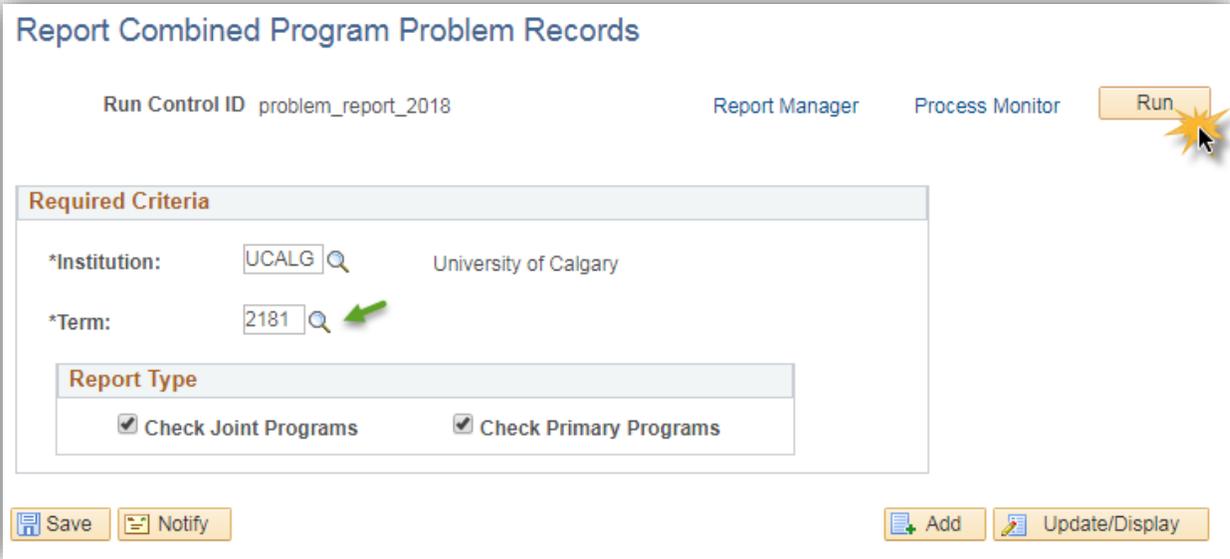
Combined Degree Problem Report

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

Report ID: UCSRR001 University of Calgary - Student Records Page No. 1
 Process Instance: 10061565 Report Combined Program Problem Records Run Date 2018/03/16
 Run Time 08:57:58

Term: 2181 Winter 2018

Pri	Name	Stdnt ID	Adm	Stat	Car#	Jnt	AProg	Degree Plan	Prim Plan	Term
One Program with Joint Program Flag Indicated - No Outstanding Admission Applications										
GS			REG		G-0	Y	GSMTH	MA-DEG	GDER-AOS	2181
			MED		M-3	N	MDFST	POST-DEG	COMM-M-MAJ	2181
LA			LAR		U-0	Y	LABCH	JD-DEG		2181
UPO			TRN		U-3	Y	ARBCH	BA-DEG	INTR-MAJ	2181
			CF3		U-1	Y	SCBCH	BSC-DEG	CPSC-MAJ	2181
Two Programs with Joint Program Flag Not Indicated										
ED			CF3		U-6	N	ARBCH	BA-DEG	ARKY-MAJ	2181
			TRN		U-8	N	EDBCH	BED-A-DEG	WEFR-MAJ	2181
GS			REG		G-0	N	GSMCB	MLND-DEG	EVDS-AOS	2181
			TRN		U-2	N	EDBCH	BEDP-S-DEG	FINA-MAJ	2181
			REG		G-0	N	GSMCB	MED-DEG	EDER-AOS	2181
			OSN		U-1	N	OSCDH	OSDPR-DEG		2181
			REG		G-0	N	GSMTH	MSC-DEG	ENME-AOS	2181
			OSR		U-2	N	OSCDH	OSDPR-DEG		2181
			REG		G-0	N	GSMCB	MP-DEG	PLAN-AOS	2181
			OSR		U-3	N	OSCDH	OSDPR-DEG		2181
			GEV		G-0	N	GSVSC	VIS-G-DEG	MGMT-AOS	2181
			OSN		U-0	N	OSVIS	VIS-DEG		2181
			REG		G-0	N	GSMTH	MSC-DEG	CPSC-AOS	2181
			OSN		U-0	N	OSCDH	OSDPR-DEG		2181
			REG		G-0	N	GSMCB	MENG-DEG	ENCP-AOS	2181
			TRN		U-0	N	ENVIS	VIS-DEG	ENOG-MAJ	2181
			REG		G-0	N	GSMCB	MENG-DEG	ENCI-AOS	2181
			TRN		U-0	N	ENVIS	VIS-DEG	ENCI-MAJ	2181
			REG		G-0	N	GSMCB	MN-DEG	NURS-AOS	2181
			OSN		U-1	N	OSCDH	OSDPR-DEG		2181
			REG		G-0	N	GSMCB	MENG-DEG	ENCP-AOS	2181
			TRN		U-0	N	ENVIS	VIS-DEG	ENOG-MAJ	2181
			REG		G-0	N	GSMCB	MENG-DEG	ENCI-AOS	2181
			OSR		U-4	N	OSCDH	OSDPR-DEG		2181

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.

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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.

Program and Plan Summary

Term	Appl Nbr	Prq#	Chc	Car#	Jnt	Pri	Prog	Degree	Aft	Plan	R	DG	Lvl	Load	Type	Adm	St	Prq	St	Reason	COI	Standing
2017	40120679	0	1		N		MDPST	POST-DEG		INTE-M-MAJ						MED	A					AC
2017-M				M-0	N	P	MDPST	POST-DEG		INTE-M-MAJ				O	F							
2077	42007738	0			N		GSMTH	MSC-DEG		MDCH-AOS				1		REG	A					AC
2077-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				1	F							
2081-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				1	F							
2083-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				1	F							
2085-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				1	F							
2087-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				2	F							
2087-M				M-1	N	P	MDPST	POST-DEG		INTE-M-MAJ				7	F							
2091-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				2	F							
2091-M				M-1	N	P	MDPST	POST-DEG		INTE-M-MAJ				7	F							
2093-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				2	F							
2095-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				2	F							
2097-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				3	N							
2097-M				M-1	N	P	MDPST	POST-DEG		INTE-M-MAJ				7	F							
2101-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				3	N							
2101-M				M-1	N	P	MDPST	POST-DEG		INTE-M-MAJ				7	F							
2103-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				3	N							
2105-G				G-0	N	P	GSMTH	MSC-DEG		MDCH-AOS				3	N							

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

1978/06/20 EDMS Save

Display canceled program status data rows.

Term	Appl Nbr	Prq#	Chc	Car#	Jnt	Pri	Prog	Degree	Alt Plan	R	DG	Lvl	Load	Type	Adm St	Prq 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			AC		
2057-U					U-2	N	P	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	N	P	SCBCH	BSC-DEG	CPSC-MAJ		4	N-N				DM		
2075-U					U-2	N	P	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.

Senior Academic Advising

SA - Advising



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.

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.

Search Results

View All First 1-9 of 9 Last

ID	Maxi Term	Academic Career	Description	Name	Gender	Date of Birth	Last Name	First Name
2171	Undergrad		Fall 2016 / Winter 2017			07/20/1991		
2165	Undergrad		Spring / Summer 2016			07/20/1991		
2161	Undergrad		Fall 2015 / Winter 2016			07/20/1991		
2155	Undergrad		Spring / Summer 2015			07/20/1991		
2151	Undergrad		Fall 2014 / Winter 2015			07/20/1991		
2145	Undergrad		Spring / Summer 2014			07/20/1991		
2141	Undergrad		Fall 2013 / Winter 2014			07/20/1991		
2135	Undergrad		Spring / Summer 2013			07/20/1991		
2131	Undergrad		Fall 2012/Winter 2013			07/20/1991		

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

Student Record Summary | Term Summary | Record Summary Overrides | Full Course History | DegNav - Defined Words | DegNav - Renames

Student Record Summary

Institution: UCALG University of Calgary

Career: Undergrad Undergraduate Programs Maxi Term: Fall 2016 / Winter 2017

ID: Reset Cum Statistics: Obey Reset: Y

Academic Group: SC Faculty of Science Refresh Print Open: Go

Term Information

Fall 2016						Winter 2017											
In progress App						In progress App											
Program	A	J	Degree-Plan	Primary-Plan	C Plans / Subplans	Adm	St	Req	Program	A	J	Degree-Plan	Primary-Plan	C Plans / Subplans	Adm	St	Req
SCBCH	N	BSC-DEG	BISC-MAJ			F16	A	F16	SCBCH	N	BSC-DEG	BISC-MAJ			F16	A	F16

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

- Application Evaluation
- Checklist Management
- Checklist Summary
- Class Registration Information
- 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

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

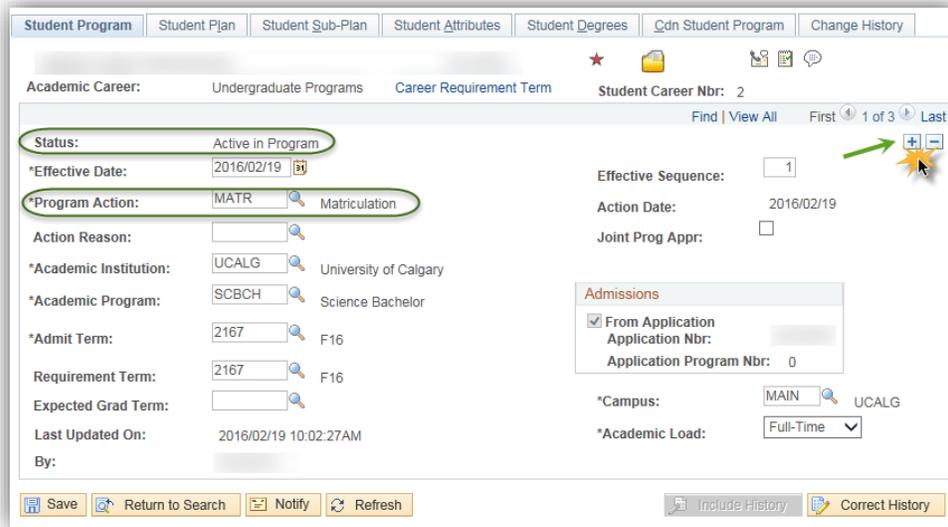
1991/07/20 EDMS Save

Display canceled program status data rows.

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.

+



Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees | Cdn Student Program | Change History

Academic Career: Undergraduate Programs Career Requirement Term Student Career Nbr: 2

Status: Active in Program

*Effective Date: 2016/02/19

*Program Action: MATR Matriculation

Action Reason:

*Academic Institution: UCALG University of Calgary

*Academic Program: SCBCH Science Bachelor

*Admit Term: 2167 F16

Requirement Term: 2167 F16

Expected Grad Term:

Last Updated On: 2016/02/19 10:02:27AM

By:

Effective Sequence: 1

Action Date: 2016/02/19

Joint Prog Appr:

Admissions

From Application

Application Nbr:

Application Program Nbr: 0

*Campus: MAIN UCALG

*Academic Load: Full-Time

Save | Return to Search | Notify | Refresh | Include History | Correct History

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.

Look Up Program Action

Help

Program Action: begins with

Description: begins with

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
DEFER	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

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.



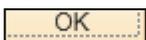
Scroll down the list of Action Reasons to select the applicable action. For example, select DNRG Did Not Register. Click the **DNRG** link.

2083	New Admit Term - Spr 2008
2085	New Admit Term - Sum 2008
2087	New Admit Term - Fall 2008
2091	New Admit Term - Wtr 2009
2093	New Admit Term - Spr 2009
2095	New Admit Term - Sum 2009
2097	New Admit Term - Fall 2009
2101	New Admit Term - Wtr 2010
2103	New Admit Term - Spr 2010
2105	New Admit Term - Sum 2010
2107	New Admit Term - Fall 2010
2111	New Admit Term - Wtr 2011
2113	New Admit Term - Spr 2011
2115	New Admit Term - Sum 2011
2117	New Admit Term - Fall 2011
2MNY	Too many courses for undecided
ADDP	Admission Deposit not received
DEFF	Appl Deferred from Fall Term
DNRG	Did Not Register
DOCL	Late Documents
DOCS	Fac Appl and/Or Docs Not Recd
DOTH	Declined Offer-1 part Joint Dg
DRNG	Deferment Request Not Granted
EMNY	Too many crses for Concurrent
ERR	Application added in error
FAIL	Failure to Report Attendance
FORG	Falsified Documents
INCA	Incomplete Application
IOTH	Inadm to Other Part of Joint
NODC	Program Not Declared
PSUP	Program Suspended by Faculty
QSPO	Qatar - Sponsorship
RTW	Required to Withdraw
STCN	Student Cancelled
WARV	Cancelled by Admissions Office
XXXX	Duplicate-Appl Nbr Correction

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.



Senior Academic Advising

SA - Advising



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

1991/07/20 EDMS Save

Display canceled program status data rows.

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:

Description:

[Basic Lookup](#)

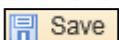
Search Results

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.



Senior Academic Advising

SA - Advising



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).

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

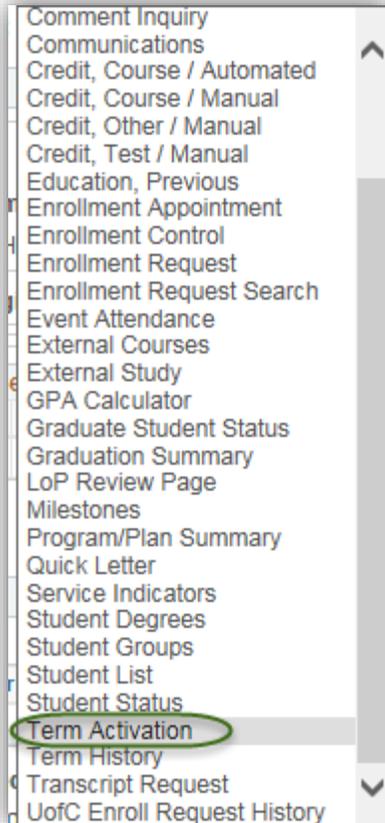
Select the applicable term (e.g. Fall 2016/Winter 2017).

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.



Click the **Go** button.



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



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.



Senior Academic Advising

SA - Advising



Term Activation | Enrollment Limit | Student Session | Terms In Residence | Term Control Dates | External Study

Academic Career: Undergraduate Programs

Find | View All | First 1 of 1 Last

Find | View 1 | First 1-17 of 17 Last

*Academic Institution: UCALG University of Calgary

*Term: 2171 W17 Units Activation Date: 2017/01/02

Student Career Nbr: 2 Science Bachelor

Override All Academic Levels:

Override Projected Level:

Academic Level - Projected: Year 4 Academic Year: 2016

Academic Level - Term Start: Year 3 Load Determination: Units

Academic Level - Term End: Year 3 *Form of Study: Enrollment

Level Determination: Units Academic Load: No Units

*Billing Career: UGRD Eligible To Enroll:

*Academic Institution: UCALG University of Calgary

*Term: 2167 F16 Units Activation Date: 2016/09/06

Student Career Nbr: 2 Science Bachelor

Override All Academic Levels:

Override Projected Level:

Academic Level - Projected: Year 4 Academic Year: 2016

Academic Level - Term Start: Year 3 Load Determination: Units

Academic Level - Term End: Year 3 *Form of Study: Enrollment

Level Determination: Units Academic Load: No Units

*Billing Career: UGRD Eligible To Enroll:

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.

Look Up Student Career Nbr

ID: [redacted] Help

Academic Career: Undergraduate Programs

Term: 2171

Academic Institution: UCALG

Student Career Nbr: [dropdown] [input]

Academic Program: [dropdown] [input]

Academic Program Status: [dropdown] [input]

Approved Academic Load: [dropdown] [input]

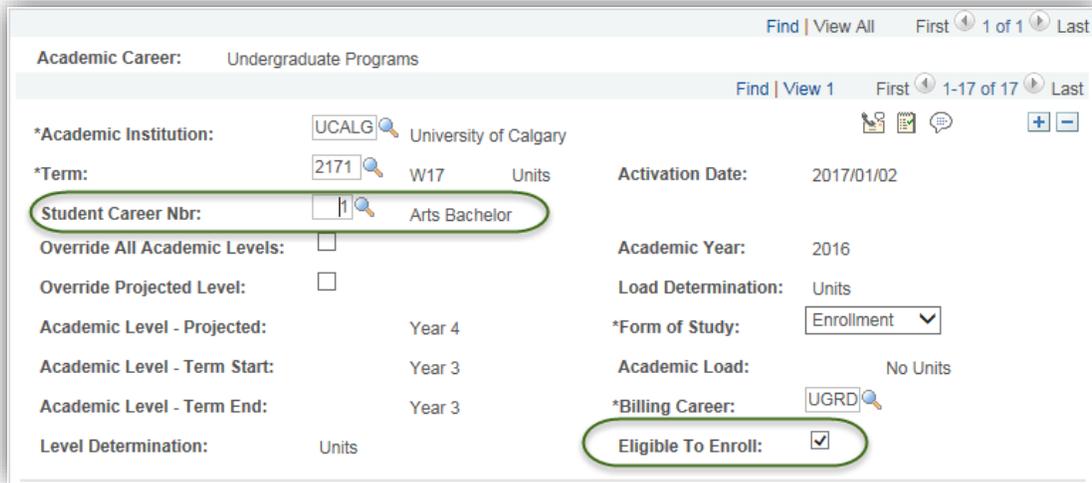
Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-4 of 4 Last

Student Career Nbr	Academic Program	Academic Program Status	Approved Academic Load
1	ARBCH	Active	Full-Time
1	ARBCH	Cancelled	Full-Time
0	ARBCH	Cancelled	Full-Time

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.



The screenshot shows a web interface for managing student academic records. The main section is titled "Academic Career: Undergraduate Programs". It displays a list of student records, with the first record selected. The record details are as follows:

*Academic Institution:	UCALG University of Calgary	Activation Date:	2017/01/02
*Term:	2171 W17 Units	Academic Year:	2016
Student Career Nbr:	1 Arts Bachelor	Load Determination:	Units
Override All Academic Levels:	<input type="checkbox"/>	*Form of Study:	Enrollment
Override Projected Level:	<input type="checkbox"/>	Academic Load:	No Units
Academic Level - Projected:	Year 4	*Billing Career:	UGRD
Academic Level - Term Start:	Year 3	Eligible To Enroll:	<input checked="" type="checkbox"/>
Academic Level - Term End:	Year 3		
Level Determination:	Units		

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**.

[View 1](#)

Click the **Save** button.

[Save](#)

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.

[Academic Advising Summary](#)

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

[Search](#)

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.

Senior Academic Advising

SA - Advising



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

Program and Plan Summary

1991/07/20 EDMS Save

Display canceled program status data rows.

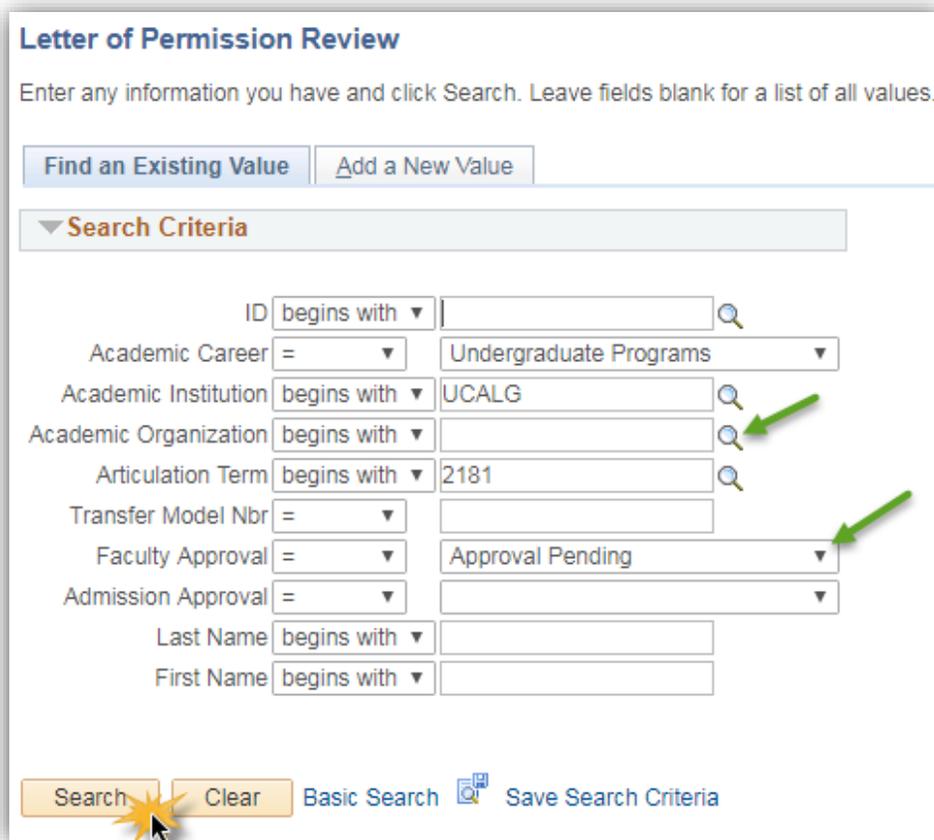
Personalize | Find | 1-23 of 23 | Last

Term	Appl Nbr	Prgr#	Chc	Car#	Int	Pri	Prgr	Degree	AR	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			1	F						
2131-U						U-0	N	P	ARBCH	BLNK-DEG			1	F						GOOD
2133-U						U-0	N	P	ARBCH	BLNK-DEG			1	N						
2135-U						U-0	N	P	ARBCH	BLNK-DEG			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			1	F						
2141-U						U-1	N	P	ARBCH	BSC-DEG			2	F						GOOD
2143-U						U-1	N	P	ARBCH	BSC-DEG			2	P						
2145-U						U-1	N	P	ARBCH	BSC-DEG			2	N						
2147-U						U-1	N	P	ARBCH	BSC-DEG			2	F						
2151-U						U-1	N	P	ARBCH	BSC-DEG			3	F						GOOD
2153-U						U-1	N	P	ARBCH	BSC-DEG			3	N						
2155-U						U-1	N	P	ARBCH	BSC-DEG			3	N						
2157-U						U-1	N	P	ARBCH	BSC-DEG			3	F						
2161-U						U-1	N	P	ARBCH	BSC-DEG			3	F						
2163-U						U-1	N	P	ARBCH	BSC-DEG			4	N						
2167	42318427	0	1			N	SCBCH	BSC-DEG		BISC-MAJ			3	CF2		CN		WARV		
2167-U						U-1	N	P	ARBCH	BSC-DEG			4	N						
2171-U						U-1	N	P	ARBCH	BSC-DEG			4	N						

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**.



Letter of Permission Review

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

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

ID	begins with ▼	<input type="text"/>	<input type="button" value="Search"/>
Academic Career	= ▼	Undergraduate Programs ▼	
Academic Institution	begins with ▼	UCALG	<input type="button" value="Search"/>
Academic Organization	begins with ▼	<input type="text"/>	<input type="button" value="Search"/>
Articulation Term	begins with ▼	2181	<input type="button" value="Search"/>
Transfer Model Nbr	= ▼	<input type="text"/>	
Faculty Approval	= ▼	Approval Pending ▼	
Admission Approval	= ▼	<input type="text"/>	
Last Name	begins with ▼	<input type="text"/>	
First Name	begins with ▼	<input type="text"/>	

[Basic Search](#)

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

Senior Academic Advising

SA - Advising



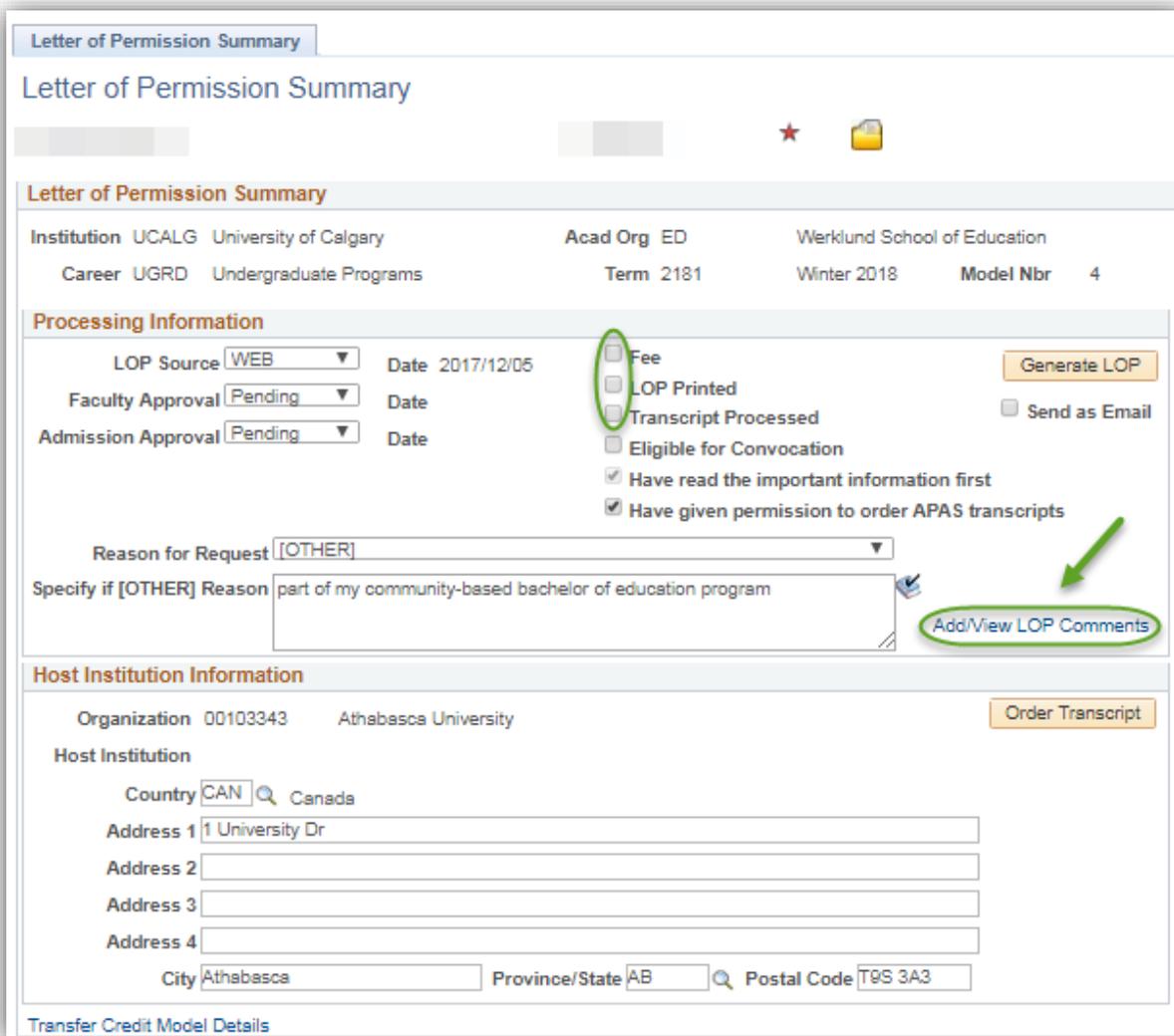
Search Results

View All First 1-38 of 38 Last

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	00103649	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)	University 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
1017...	...	...	...	...	...	...	...	...	...	...	...

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.



Letter of Permission Summary

Letter of Permission Summary

Institution UCALG University of Calgary Acad Org ED Werklund School of Education
 Career UGRD Undergraduate Programs Term 2181 Winter 2018 Model Nbr 4

Processing Information

LOP Source Date 2017/12/05 Fee
 Faculty Approval Date LOP Printed Send as Email
 Admission Approval Date Transcript Processed
 Eligible for Convocation
 Have read the important information first
 Have given permission to order APAS transcripts

Reason for Request
 Specify if [OTHER] Reason

Host Institution Information

Organization 00103343 Athabasca University
 Host Institution
 Country Canada
 Address 1
 Address 2
 Address 3
 Address 4
 City Province/State Postal Code

[Transfer Credit Model Details](#)

- 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

Letter of Permission Comments

ID

Institution	UCALG	University of Calgary	Acad Org	ED	Werklund School of Education		
Career	UGRD	Undergraduate Programs	Term	2181	Winter 2018	Model Nbr	4

Coded Comments Find | View All First 1 of 1 Last

*Comment Code   

Comment

Free Format Comments Find | View All First 1 of 1 Last

*Comment   

OK Cancel

- 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'.

[Favorites](#) > [Main Menu](#) > [Records and Enrollment](#) > [Transfer Credit Evaluation](#) > [Letter of Permission Review](#)



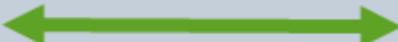
Letter of Permission Comments

ID: [] []

Institution: UCALG University of Calgary Acad Org: E

Career: UGRD Undergraduate Programs Term: 2

Coded Comments

*Comment Code: [] 

Comment: []

Free Format Comments

*Comment: []

Look Up Comment Code

Academic Institution: UCALG

Admission Comment Code: begins with []

Description: begins with []

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 BHSoc
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-

Senior Academic Advising

SA - Advising



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.

Letter of Permission Summary

Letter of Permission Summary

Institution UCALG University of Calgary Acad Org ED Werklund School of Education
Career UGRD Undergraduate Programs Term 2181 Winter 2018 Model Nbr 4

Processing Information

LOP Source WEB Date 2017/12/05 Fee
Faculty Approval Pending Date LOP Printed Send as Email
Admission Approval Pending Date Transcript Processed Eligible for Convocation
 Have read the important information first
 Have given permission to order APAS transcripts

Reason for Request [OTHER]
Specify if [OTHER] Reason part of my community-based bachelor of education program

Host Institution Information

Organization 00103343 Athabasca University

Host Institution

Country CAN Canada
Address 1 1 University Dr
Address 2
Address 3
Address 4
City Athabasca Province/State AB Postal Code T9S 3A3

[Transfer Credit Model Details](#)

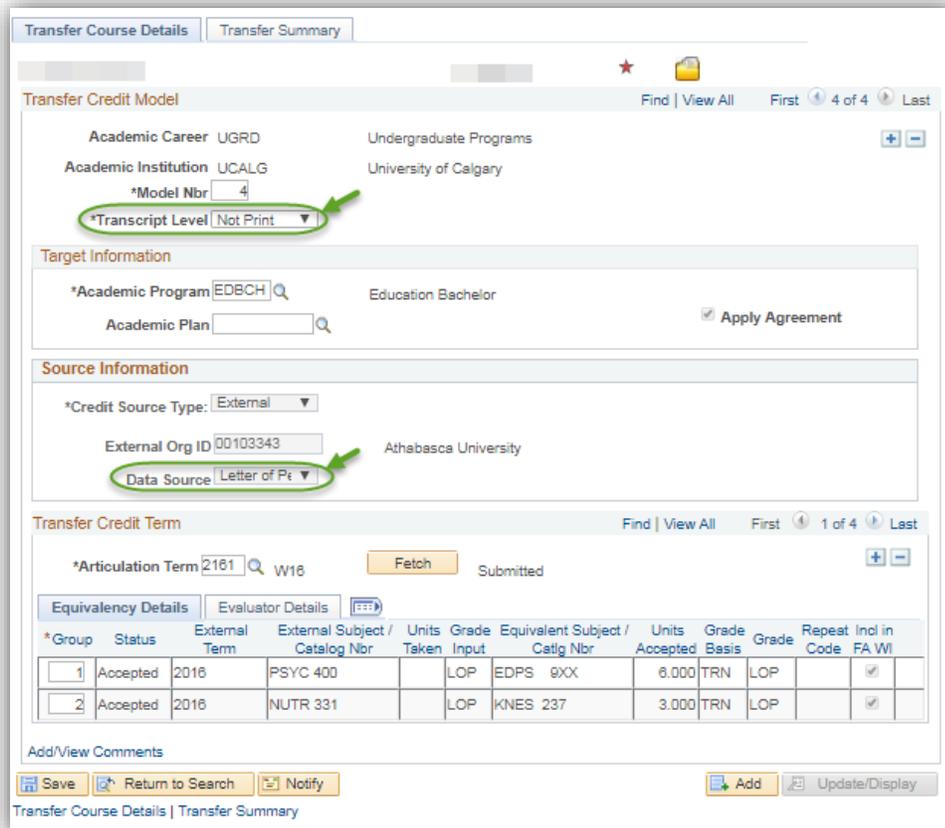
The **Transfer Credit Model** screen for automated transfer credit will appear (click **View All**).

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. Athabasca University, etc. will both be listed under this model). This information is particularly important for verifying Letters of Permission.



Transfer Credit Model Find | View All First 4 of 4 Last

Academic Career UGRD Undergraduate Programs

Academic Institution UCALG University of Calgary

*Model Nbr 4

*Transcript Level Not Print

Target Information

*Academic Program EDBCH Education Bachelor

Academic Plan

Apply Agreement

Source Information

*Credit Source Type: External

External Org ID 00103343 Athabasca University

*Data Source Letter of P

Transfer Credit Term Find | View All First 1 of 4 Last

*Articulation Term 2161 W16 Fetch Submitted

Equivalency Details Evaluator Details

*Group	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
1	Accepted	2016	PSYC 400		LOP	EDPS 9XX	6.000	TRN	LOP		<input checked="" type="checkbox"/>
2	Accepted	2016	NUTR 331		LOP	KNES 237	3.000	TRN	LOP		<input checked="" type="checkbox"/>

Add/View Comments

Save Return to Search Notify Add Update/Display

Transfer Course Details | Transfer Summary

Senior Academic Advising

SA - Advising



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

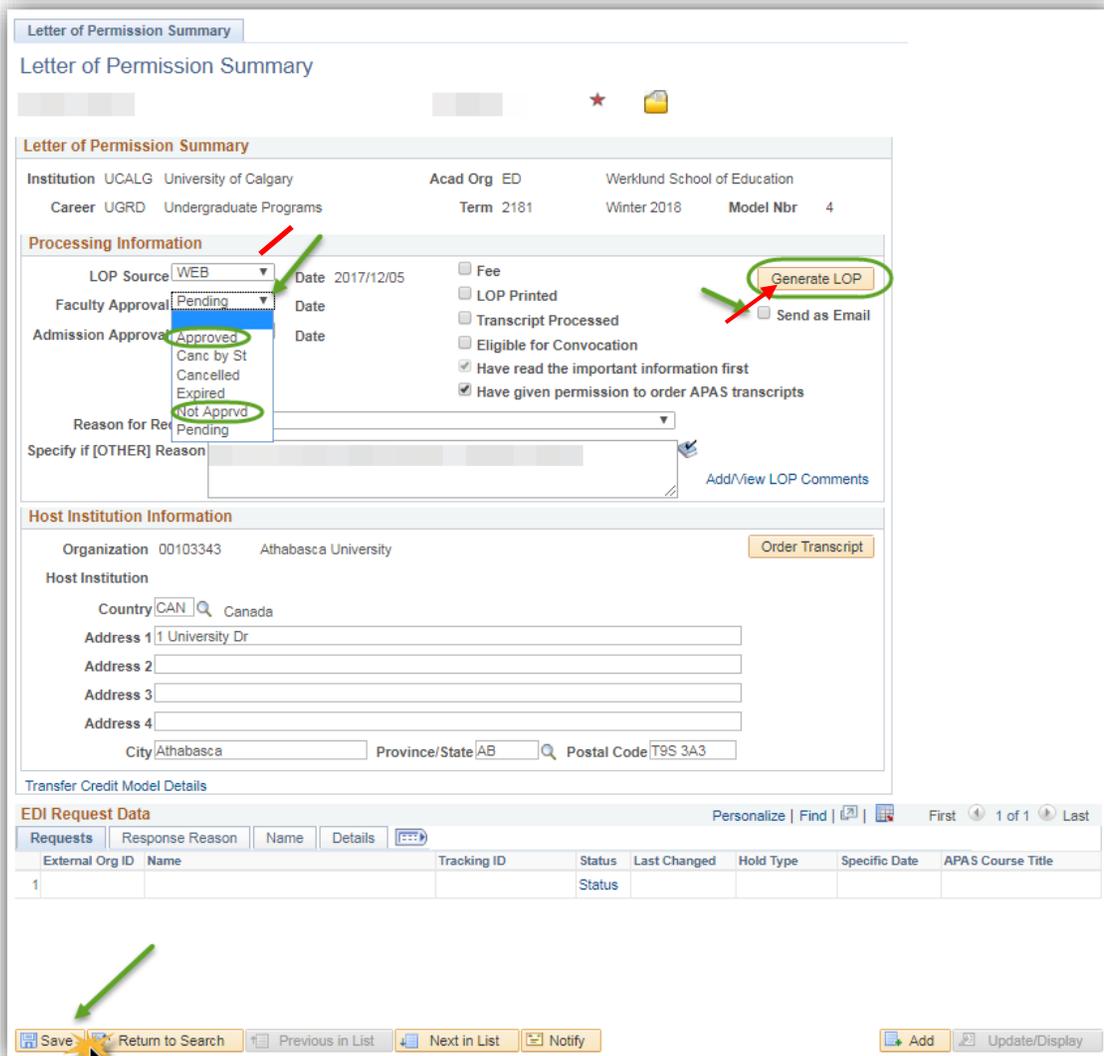
In this example this student has a letter of permission transfer credit model for their Winter 2016 Letter of Permission.

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**.



Letter of Permission Summary

Letter of Permission Summary

Institution UCALG University of Calgary Acad Org ED Werklund School of Education
 Career UGRD Undergraduate Programs Term 2181 Winter 2018 Model Nbr 4

Processing Information

LOP Source WEB Date 2017/12/05 Fee
 Faculty Approval Pending Date LOP Printed Send as Email
 Admission Approval Approved Date Transcript Processed
 Canc by St Eligible for Convocation
 Expired Have read the important information first
 Not Approvd Have given permission to order APAS transcripts
 Reason for Ret Pending
 Specify if [OTHER] Reason Add/View LOP Comments

Host Institution Information

Organization 00103343 Athabasca University
 Host Institution
 Country CAN Canada
 Address 1 University Dr
 Address 2
 Address 3
 Address 4
 City Athabasca Province/State AB Postal Code T9S 3A3

Transfer Credit Model Details

EDI Request Data Personalize | Find | First 1 of 1 Last

Requests	Response Reason	Name	Details	External Org ID	Name	Tracking ID	Status	Last Changed	Hold Type	Specific Date	APAS Course Title
1							Status				

Save Return to Search Previous in List Next in List Notify Add Update/Display

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.

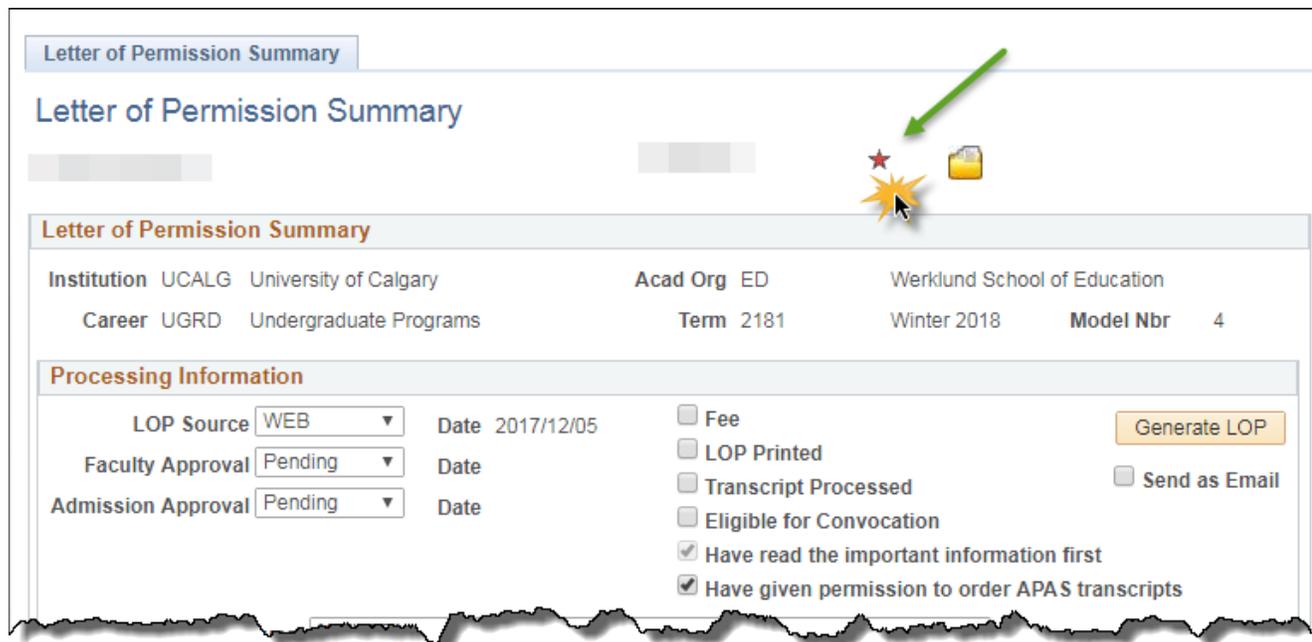
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Checking Positive Service Indicator (to see if a student is currently on a Letter of Permission)

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.

Manage Service Indicators

Display Effect Positive Institution University of Calgary Refresh 

[+ Add Service Indicator](#)

Service Indicator Summary Personalize | Find | View All |   First 1-3 of 3 Last

Code	Code Description	Reason Description	Institution	Start Term	End Term	End Term Description	Start Date	End Date
LOP	Letter of Permission Alert	Staff Action Required	UCALG	2177	F17		2017/06/05	
LOP	Letter of Permission Alert	Staff Action Required	UCALG	2167	F16		2016/06/02	
LOP	Letter of Permission Alert	Staff Action Required	UCALG	2161	W16		2015/10/05	

[+ Add Service Indicator](#)

[Cancel](#)

- 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).

Comments

2000 characters remaining

Services Impacted Personalize | Find | View All |   First 1 of 1 Last

Impact	Description	Basis - Date	Basis - Term	Term Category
1 ALERT	Alert Flag - No Impact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

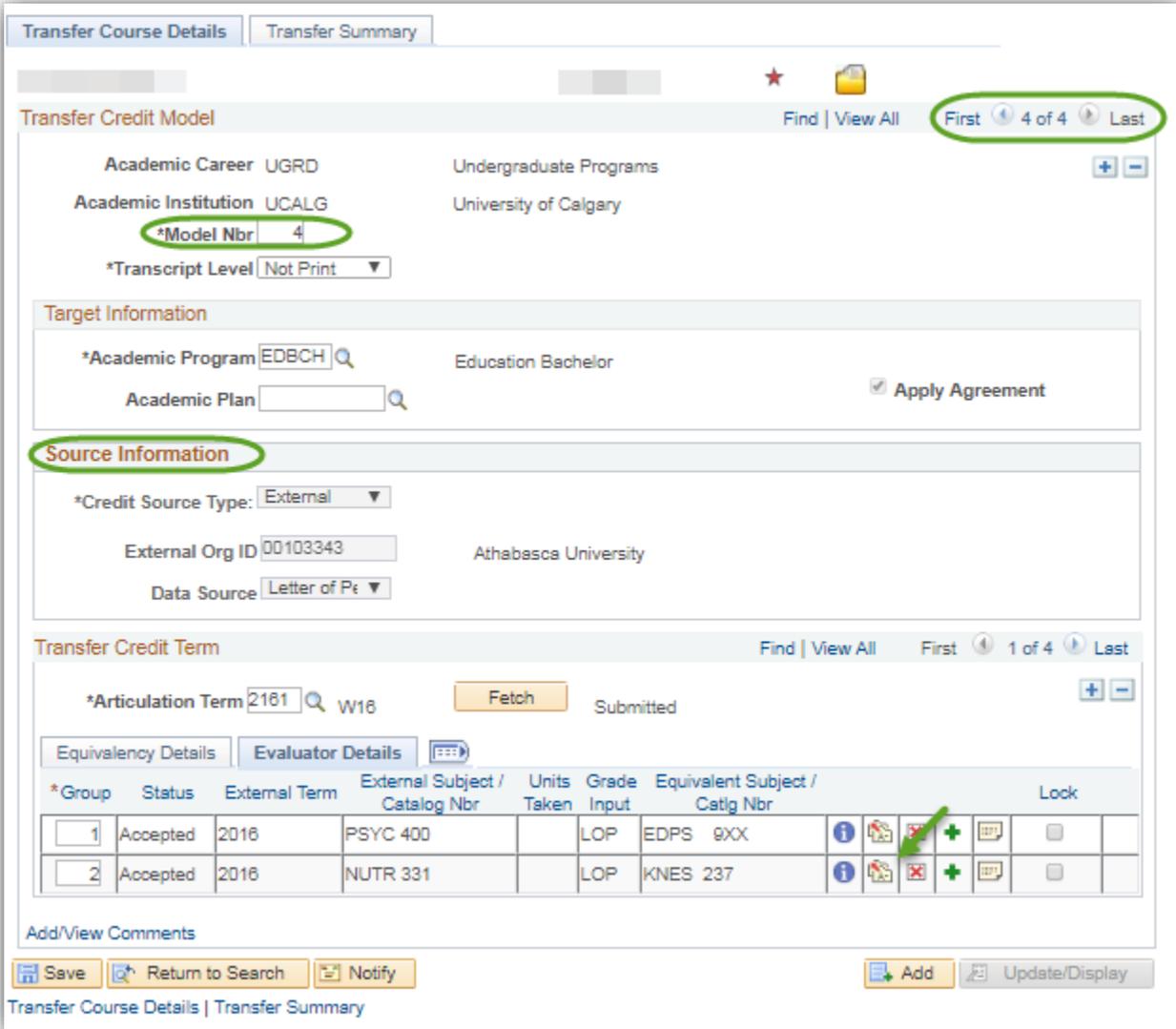
Service Indicator Date Time 2017/06/05 9:49:15AM

User ID

[OK](#) [Cancel](#) [Apply](#)

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.



The screenshot displays the 'Transfer Course Details' page. At the top, there are tabs for 'Transfer Course Details' and 'Transfer Summary'. Below this, the 'Transfer Credit Model' section includes fields for 'Academic Career' (UGRD), 'Academic Institution' (UCALG), '*Model Nbr' (4), and '*Transcript Level' (Not Print). The 'Target Information' section contains '*Academic Program' (EDBCH) and 'Academic Plan'. The 'Source Information' section shows '*Credit Source Type' (External), 'External Org ID' (00103343), and 'Data Source' (Letter of Petition). The 'Transfer Credit Term' section includes '*Articulation Term' (2181) and a 'Fetch' button. Below these sections is a table with columns for Group, Status, External Term, External Subject / Catalog Nbr, Units Taken, Grade Input, Equivalent Subject / Catlg Nbr, and Lock. The table contains two rows of data. A green arrow points to the 'Equivalent Subject / Catlg Nbr' column for the first row.

*Group	Status	External Term	External Subject / Catalog Nbr	Units Taken	Grade Input	Equivalent Subject / Catlg Nbr	Lock
1	Accepted	2016	PSYC 400		LOP	EDPS 9XX	
2	Accepted	2016	NUTR 331		LOP	KNES 237	

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.

Equivalent Course Information

Incoming Course

Term	2016			
Course	NUTR	331	NUTR 331	
Units Taken	0.00			
Grade Input	LOP	LOP		Crse Level Regular

Equivalent Course

Course ID	124412	🔍	Introduction to Nutrition	<input type="button" value="Clear"/>
Offer Nbr	1	🔍	KNES 237	
Grading Scheme	CMB	🔍	PCT/4PT(TR1) Transfer Grading	<input type="checkbox"/> Valid Attempt
Grading Basis	TRN	🔍	PCT/4PT(TR1) Combination	<input type="checkbox"/> Earn Credit
Official Grade	LOP	🔍		<input type="checkbox"/> Include in GPA
Units Transferred	3.000		Grd Pt/Unt	Units Att Yes
Repeat Code		🔍		
Designation		🔍		
<input checked="" type="checkbox"/> Include in FA WI Stats				

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.

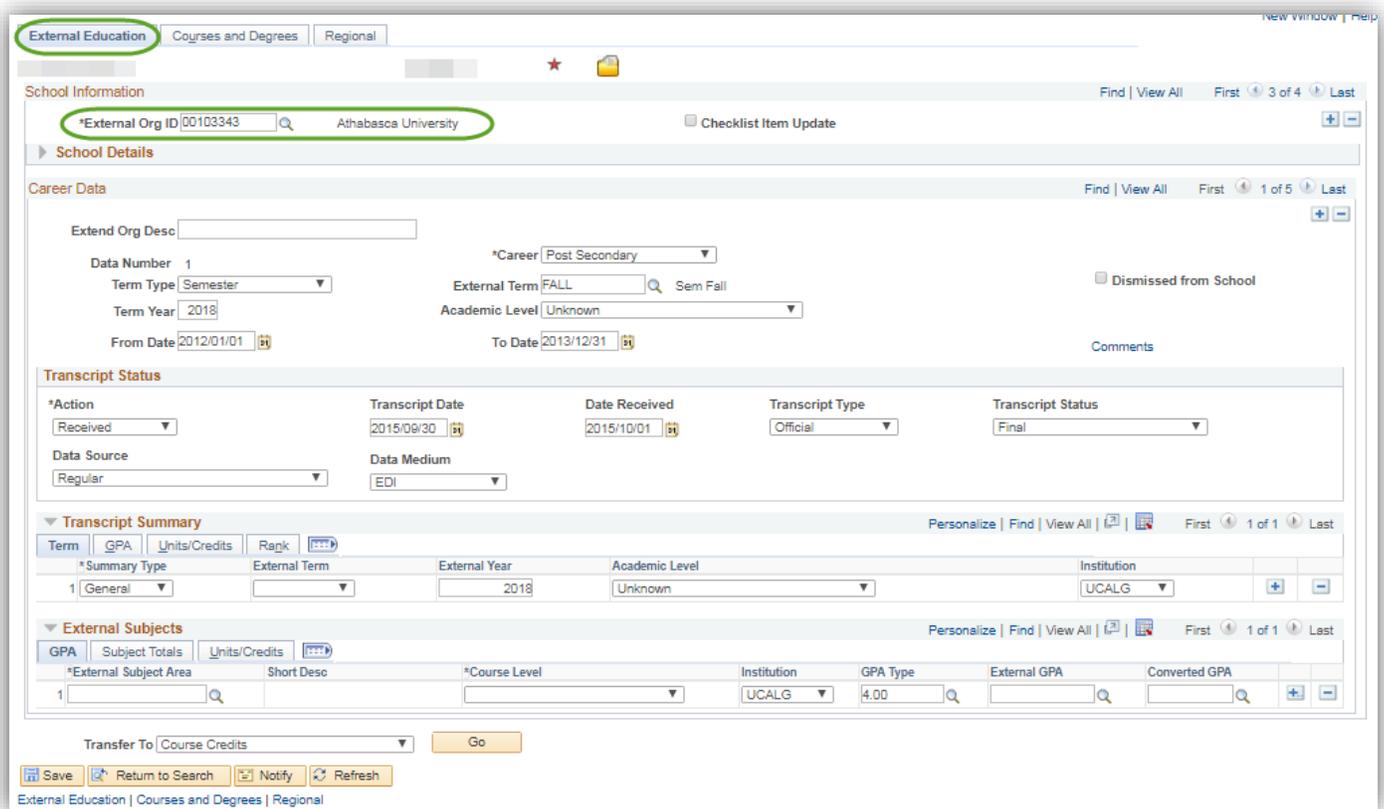
It is important to **never** delete information on the external education screen or the transfer credit model.

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).



The screenshot shows the 'External Education' system interface. At the top, there are navigation tabs: 'External Education' (highlighted with a green circle), 'Courses and Degrees', and 'Regional'. Below this is the 'School Information' section, where the '*External Org ID' is '00103343' and the school is 'Athabasca University'. The 'School Details' section is expanded. Under 'Career Data', fields include 'Extend Org Desc', 'Data Number' (1), 'Term Type' (Semester), 'Term Year' (2018), 'From Date' (2012/01/01), '*Career' (Post Secondary), 'External Term' (FALL), 'Academic Level' (Unknown), and 'To Date' (2013/12/31). The 'Transcript Status' section shows 'Action' (Received), 'Transcript Date' (2015/09/30), 'Date Received' (2015/10/01), 'Transcript Type' (Official), and 'Transcript Status' (Final). Below this is a 'Transcript Summary' table with columns for Term, GPA, Units/Credits, Rank, Summary Type, External Term, External Year, Academic Level, and Institution. The 'External Subjects' table has columns for GPA, Subject Totals, Units/Credits, External Subject Area, Short Desc, Course Level, Institution, GPA Type, External GPA, and Converted GPA. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh', along with a 'Transfer To' dropdown set to 'Course Credits' and a 'Go' button.

2. Revising Course Information

Changing Begin/End Dates:

- Select the **Courses and Degrees** tab.
- Click the  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.

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External Education **Courses and Degrees** Regional

External Organization Athabasca University

External Org ID 00103343

External Course Defaults

Data Number [] External Career Post Secondary [] Apply Defaults

Data Source Self-Reported Information [] Term Type Semester []

Acad Level Unknown [] External Term []

Institution UCALG [] UCALG [] Term Year []

Course Type Course [] Course Level []

Unit Type Units [] Units Taken []

Grading Scheme CMB [] Grading Basis TRN [] Transfer

External Courses

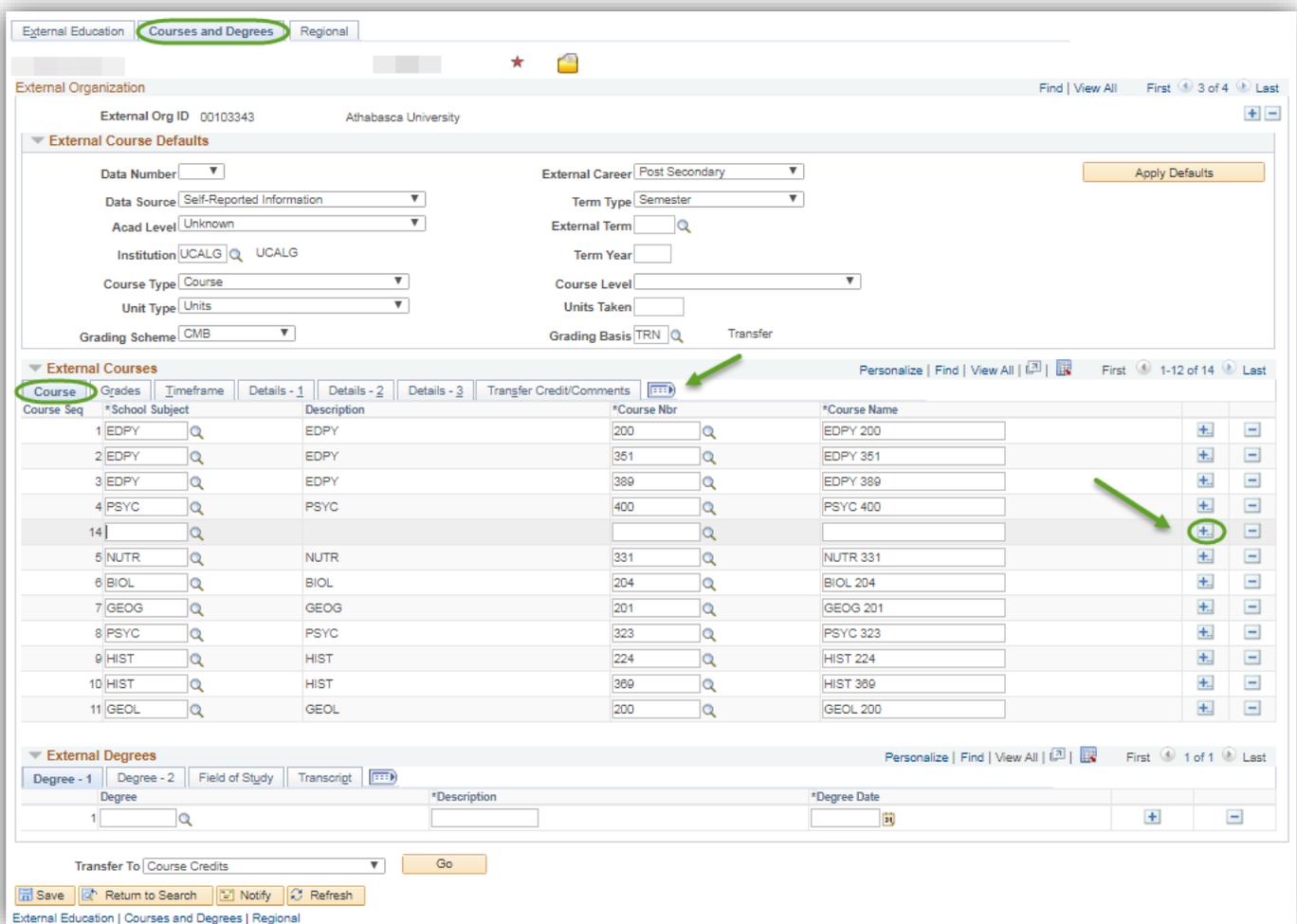
Personalize | Find | View All | [] First 1-12 of 13 Last

Course	Grades	Timeframe	Details - 1	Details - 2	Details - 3	Transfer Credit/Comments	External Term	Term Year	Begin Date	End Date		
1	1		Semester				Sem Winter	2012	2012/01/01		[+]	[-]
2	1		Semester				Sem Fall	2012	2012/09/01		[+]	[-]
3	1		Semester				Sem Fall	2013	2013/09/01		[+]	[-]
4	2		Other					2016	2016/01/01	2016/06/01	[+]	[-]
5	2		Other					2016	2016/01/01	2016/06/01	[+]	[-]
6	3		Other					2016	2016/09/01	2016/12/01	[+]	[-]
7	3		Other					2016	2016/09/01	2016/12/01	[+]	[-]
8	3		Other					2016	2016/09/01	2016/12/01	[+]	[-]
9	4		Other					2017	2017/09/01	2018/02/01	[+]	[-]
10	4		Other					2017	2017/09/01	2018/02/01	[+]	[-]
11	4		Other					2017	2017/09/01	2018/02/01	[+]	[-]
12	5		Other					2018	2018/01/01	2018/01/01	[+]	[-]

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 outlined 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**



The screenshot shows the 'Courses and Degrees' tab in the External Education system. The 'External Course Defaults' section includes fields for Data Number, Data Source, Acad Level, Institution (UCALG), Course Type, Unit Type, Grading Scheme, External Career, Term Type, External Term, Term Year, Course Level, Units Taken, and Grading Basis. Below this is the 'External Courses' table with columns for Course Seq, School Subject, Description, *Course Nbr, and *Course Name. A green arrow points to the 'Course' tab, and another green arrow points to the '+' button in the right column of the table. Below the table is the 'External Degrees' section with tabs for Degree - 1, Degree - 2, Field of Study, and Transcrit.

Course Seq	*School Subject	Description	*Course Nbr	*Course Name
1	EDPY	EDPY	200	EDPY 200
2	EDPY	EDPY	351	EDPY 351
3	EDPY	EDPY	389	EDPY 389
4	PSYC	PSYC	400	PSYC 400
14				
5	NUTR	NUTR	331	NUTR 331
6	BIOL	BIOL	204	BIOL 204
7	GEOG	GEOG	201	GEOG 201
8	PSYC	PSYC	323	PSYC 323
9	HIST	HIST	224	HIST 224
10	HIST	HIST	369	HIST 369
11	GEOL	GEOL	200	GEOL 200

- Click the  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.

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-
- 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.

External Courses

Course Seq	*School Subject	Description	*Course Nbr	*Course Name	Subject Area	Description	Units Taken	*Grading Scheme	*Grading Basis	*Grade In	Official Grade	Data Number
1	EDPY	EDPY	200	EDPY 200	PSEC	Post Secondary Courses	0.00	CMB	TRN	A	A	1
2	EDPY	EDPY	351	EDPY 351	PSEC	Post Secondary Courses	0.00	CMB	TRN	A+	A+	1
3	EDPY	EDPY	389	EDPY 389	PSEC	Post Secondary Courses	0.00	CMB	TRN	A+	A+	1
4	PSYC	PSYC	400	PSYC 400	PSEC	Post Secondary Courses	0.00	UGRD	TRN	LOP	LOP	2
14	PSYC	PSYC	432	PSYC 432	PSEC	Post Secondary Courses	0.00	UGRD	TRN	LOP	LOP	2
5	NUTR	NUTR	331	NUTR 331	PSEC	Post Secondary Courses	0.00	UGRD	TRN	LOP	LOP	2
6	BIOL	BIOL	204	BIOL 204	PSEC	Post Secondary Courses	0.00	UGRD	TRN	LOP	LOP	3

- 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.

Data Number	Term Type	External Term	Term Year	Begin Date	End Date	*External Career	*Data Source	Acad Level
1	Semester	Sem Winter	2012	2012/01/01		Post Secondary	Regular	Unknown
1	Semester	Sem Fall	2012	2012/09/01		Post Secondary	Regular	Unknown
1	Semester	Sem Fall	2013	2013/09/01		Post Secondary	Regular	Unknown
2	Other		2016	2016/01/01	2016/05/31	Post Secondary	Letter of Permission Request	Unknown
1	Semester	Sem Fall	2018			Post Secondary	Regular	Unknown
2	Other		2016	2016/01/01	2016/05/31	Post Secondary	Letter of Permission Request	Unknown
3	Other		2016	2016/09/01	2016/12/31	Post Secondary	Letter of Permission Request	Unknown
3	Other		2016	2016/09/01	2016/12/31	Post Secondary	Letter of Permission Request	Unknown
			2016			Post Secondary	Letter of Perm	

- 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.

End Date	*External Career	*Data Source	Acad Level	Unit Type	*Course Type
	Post Secondary	Regular	Unknown	Units	Course
	Post Secondary	Regular	Unknown	Units	Course
	Post Secondary	Regular	Unknown	Units	Course
2016/05/31	Post Secondary	Letter of Permission Request	Unknown	Units	Course
	Post Secondary	Regular	Unknown	Units	Course
2016/05/31	Post Secondary	Letter of Permission Request	Unknown	Units	Course
2016/12/31	Post Secondary	Letter of Permission Request	Unknown	Units	Course
	Post Secondary	Letter of Perm	Request	Units	Course

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The screenshot shows a web application interface for "External Courses". At the top, there are tabs for "Details - 1", "Details - 2", "Details - 3", and "Transfer Credit/Comments". The "Details - 1" tab is active. Below the tabs is a table with the following columns: "Course Seq", "*External Career", and "*Data Source". The table contains 7 rows of data. The row for "Course Seq" 14 is highlighted with a green oval. The "Data Source" for this row is "Regular".

Course Seq	*External Career	*Data Source
1	Post Secondary	Regular
2	Post Secondary	Regular
3	Post Secondary	Regular
4	Post Secondary	Letter of Permission Request
14	Post Secondary	Regular
5	Post Secondary	Letter of Permission Request
6	Post Secondary	Letter of Permission Request
7	Post Secondary	Letter of Permission Request

- 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

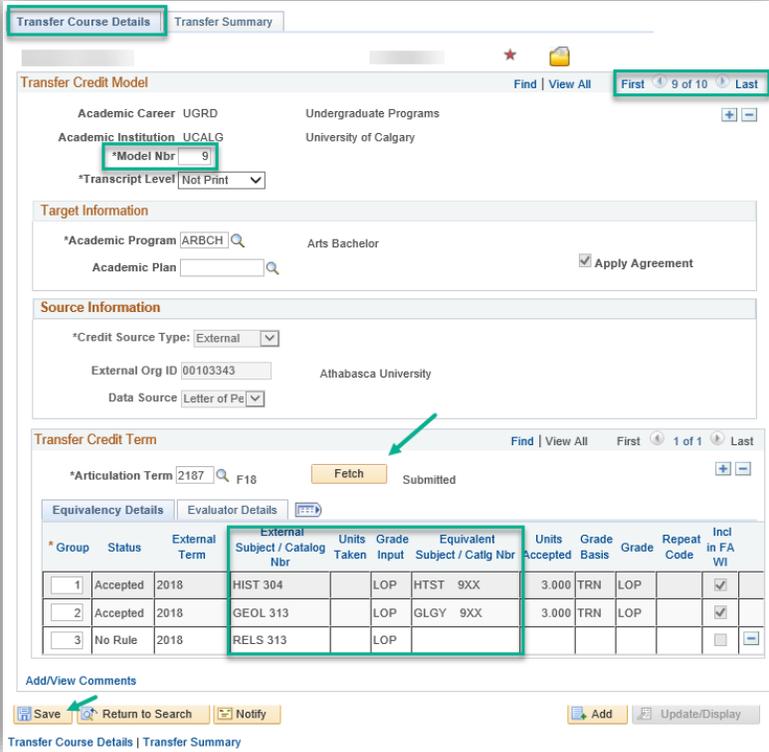
If changes have been made on the external education screen, you must update the course information on the transfer credit model.

- 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.



Transfer Course Details | Transfer Summary

Transfer Credit Model Find | View All First 9 of 10 Last

Academic Career UGRD Undergraduate Programs
Academic Institution UCALG University of Calgary
*Model Nbr 9
*Transcript Level Not Print

Target Information

*Academic Program ARBCH Arts Bachelor
Academic Plan
 Apply Agreement

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 2187 F18 **Fetch** Submitted

Equivalency Details | Evaluator Details

*Group	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
1	Accepted	2018	HIST 304		LOP	HTST 9XX	3.000	TRN	LOP		<input checked="" type="checkbox"/>
2	Accepted	2018	GEOL 313		LOP	GLGY 9XX	3.000	TRN	LOP		<input checked="" type="checkbox"/>
3	No Rule	2018	RELS 313		LOP						<input type="checkbox"/>

Add/View Comments

Save **Return to Search** **Notify** **Add** **Update/Display**

Transfer Course Details | Transfer Summary

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:

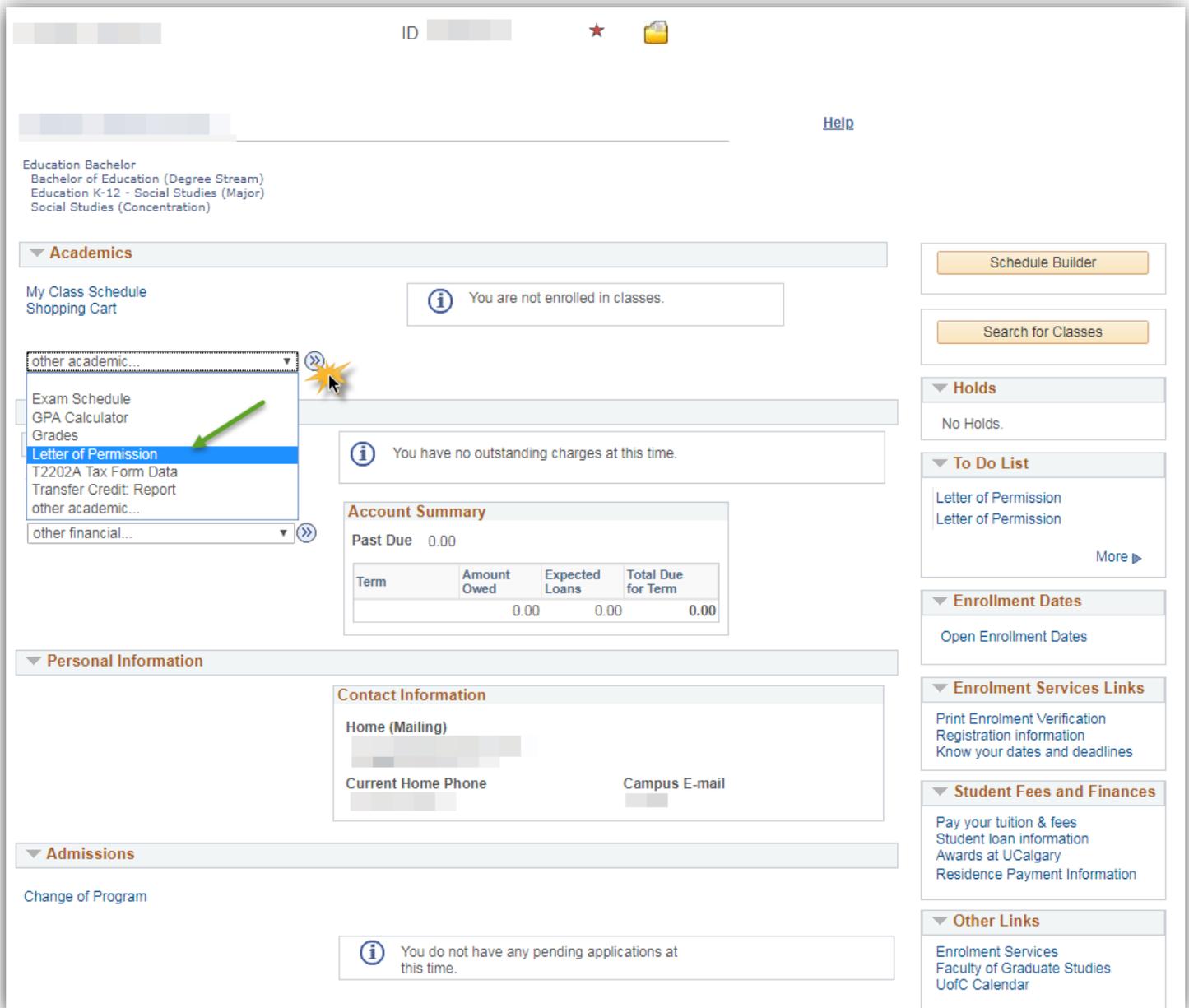
- Staff can access the on-line application themselves through the Student Services Center. This is recommended since it is the easiest method and can result in either an automated or manual transfer credit model, depending on whether the institution is selected from the drop-down menu).
- Staff can enter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



The screenshot shows a student portal interface. At the top, there is a user ID field, a star icon, and a folder icon. Below this, the user's name is partially visible, and a 'Help' link is present. The user's education details are listed: Education Bachelor, Bachelor of Education (Degree Stream), Education K-12 - Social Studies (Major), and Social Studies (Concentration).

The main content area is divided into several sections:

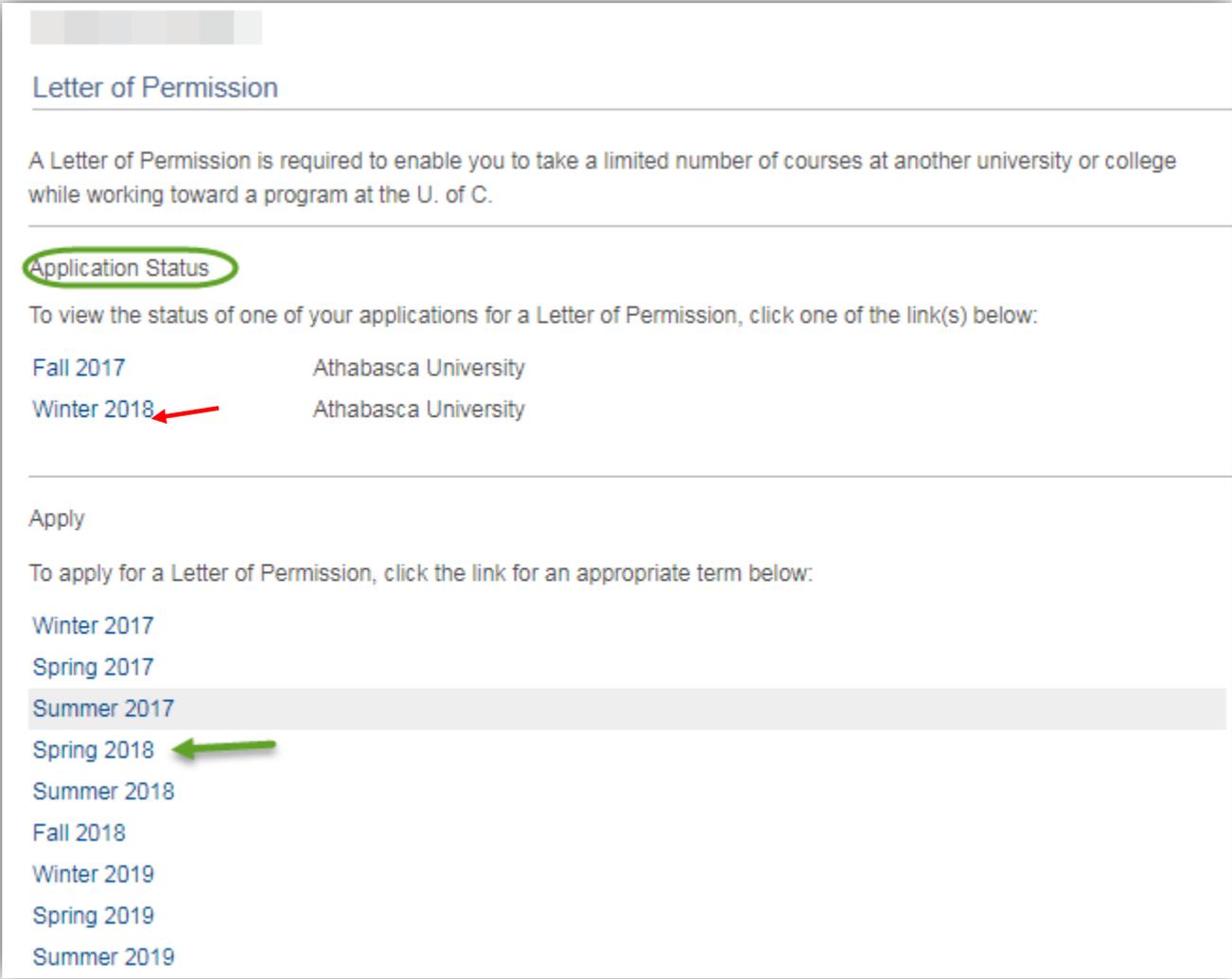
- Academics:** Contains 'My Class Schedule' and 'Shopping Cart'. A message states 'You are not enrolled in classes.' A dropdown menu is open, showing options: Exam Schedule, GPA Calculator, Grades, **Letter of Permission** (highlighted with a green arrow), T2202A Tax Form Data, Transfer Credit: Report, and other academic... Below the dropdown is another message: 'You have no outstanding charges at this time.' An 'Account Summary' table is also present.

Term	Amount Owed	Expected Loans	Total Due for Term
	0.00	0.00	0.00
- Personal Information:** Contains 'Contact Information' with fields for Home (Mailing), Current Home Phone, and Campus E-mail.
- Admissions:** Contains 'Change of Program' and a message: 'You do not have any pending applications at this time.'

On the right side, there are several utility boxes:

- Schedule Builder** (button)
- Search for Classes** (button)
- Holds:** No Holds.
- To Do List:** Letter of Permission, Letter of Permission, More ▶
- Enrollment Dates:** Open Enrollment Dates
- Enrolment Services Links:** Print Enrolment Verification, Registration information, Know your dates and deadlines
- Student Fees and Finances:** Pay your tuition & fees, Student loan information, Awards at UCalgary, Residence Payment Information
- Other Links:** Enrolment Services, Faculty of Graduate Studies, UofC Calendar

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



The screenshot shows a web page titled "Letter of Permission". Below the title is a paragraph explaining that a Letter of Permission is required to take a limited number of courses at another university or college while working toward a program at the U. of C. Below this is a section titled "Application Status" (circled in green). Under "Application Status", there is a paragraph: "To view the status of one of your applications for a Letter of Permission, click one of the link(s) below:". This is followed by a table with two columns: Term and Institution. The first row is "Fall 2017" and "Athabasca University". The second row is "Winter 2018" and "Athabasca University", with a red arrow pointing to "Winter 2018". Below the table is a section titled "Apply" with the text: "To apply for a Letter of Permission, click the link for an appropriate term below:". This is followed by a list of terms: "Winter 2017", "Spring 2017", "Summer 2017", "Spring 2018", "Summer 2018", "Fall 2018", "Winter 2019", "Spring 2019", and "Summer 2019". The "Spring 2018" option is highlighted with a green arrow pointing to it.

Letter of Permission

A Letter of Permission is required to enable you to take a limited number of courses at another university or college while working toward a program at the U. of C.

Application Status

To view the status of one of your applications for a Letter of Permission, click one of the link(s) below:

Fall 2017	Athabasca University
Winter 2018	Athabasca University

Apply

To apply for a Letter of Permission, click the link for an appropriate term below:

- Winter 2017
- Spring 2017
- Summer 2017
- Spring 2018
- Summer 2018
- Fall 2018
- Winter 2019
- Spring 2019
- Summer 2019

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



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

[click here to select an institution](#)

Institution:

Country: [click here to select a country](#)Address 1: Address 2: Address 3: Address 4: City:

Province

[click here to select a province / state](#)

/State:

Post:

Letter of Permission

Institution Selection

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

Name Contains:

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

Select an Institution	
<input type="button" value="SELECT"/>	University of Alberta

[Other - Not One of The Above](#)

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:

Address 2:

Address 3:

Address 4:

City:

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

Postal:

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:

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	<input type="text"/>	select course number	<input type="text"/>	<input type="text" value="▼"/>	<input type="text" value="▼"/>
2	select course name	<input type="text"/>	select course number	<input type="text"/>	<input type="text" value="▼"/>	<input type="text" value="▼"/>
3	select course name	<input type="text"/>	select course number	<input type="text"/>	<input type="text" value="▼"/>	<input type="text" value="▼"/>
4	select course name	<input type="text"/>	select course number	<input type="text"/>	<input type="text" value="▼"/>	<input type="text" value="▼"/>
5	select course name	<input type="text"/>	select course number	<input type="text"/>	<input type="text" value="▼"/>	<input type="text" value="▼"/>

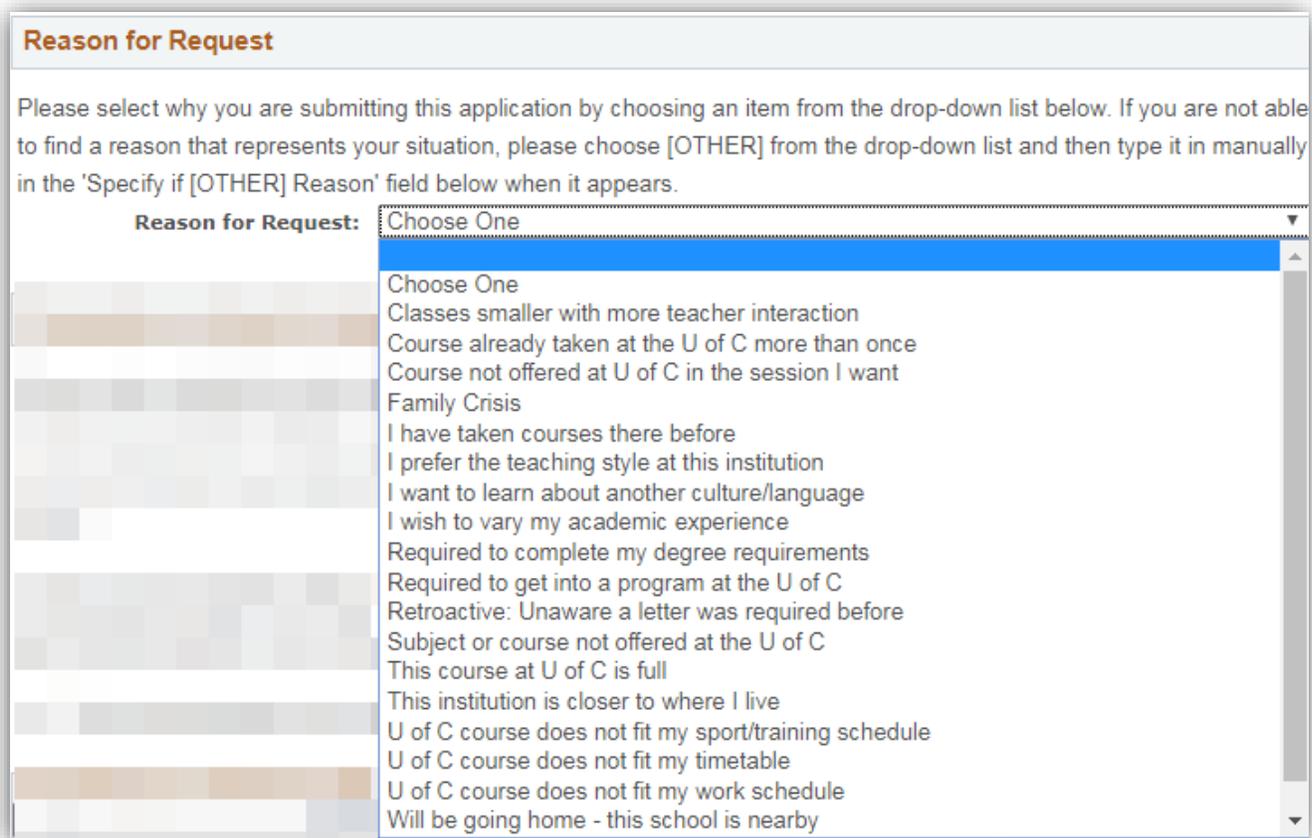
If the institution is listed, it will automatically autocomplete the address section. If there is any inconsistency with the address, it may be manually edited.

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.



The screenshot shows a web form titled "Reason for Request". Below the title is a text instruction: "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." Below this instruction is a label "Reason for Request:" followed by a dropdown menu. The dropdown menu is open, showing a list of reasons. The first option is "Choose One" (highlighted in blue). Other options include: "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", and "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.

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	CHEM	select course number	261	2018-04 ▼	2018-07 ▼
2	select course name	CHEM	select course number	263	2018-04 ▼	2018-07 ▼
3	select course name		select course number		▼	▼
4	select course name		select course number		▼	▼
5	select course name		select course number		▼	▼

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.

2. Confirm Intentions 1 — 2 — 3

Request for Spring 2018

Host Institution: University of Alberta
Office of the Registrar
2nd Floor Administration Building
Edmonton AB T6G 2M7

Reason for Request: Required to complete my degree requirements

Course(s) you intend to take at the host institution				
Course Name	Course Number	Course Description	From Month	To Month
CHEM	261	CHEM 261	2018-04	2018-07
CHEM	263	CHEM 263	2018-04	2018-07

To complete this process, click the 'SUBMIT' button below. Then please wait until this processing is completed for confirmation that your request for a Letter of Permission has been submitted successfully.

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.

Letter of Permission

3. Confirmation



Thank you for submitting your application for a Letter of Permission.

To return to the Letter of Permission main page, click

[LETTER OF PERMISSION](#)

Senior Academic Advising

SA - Advising

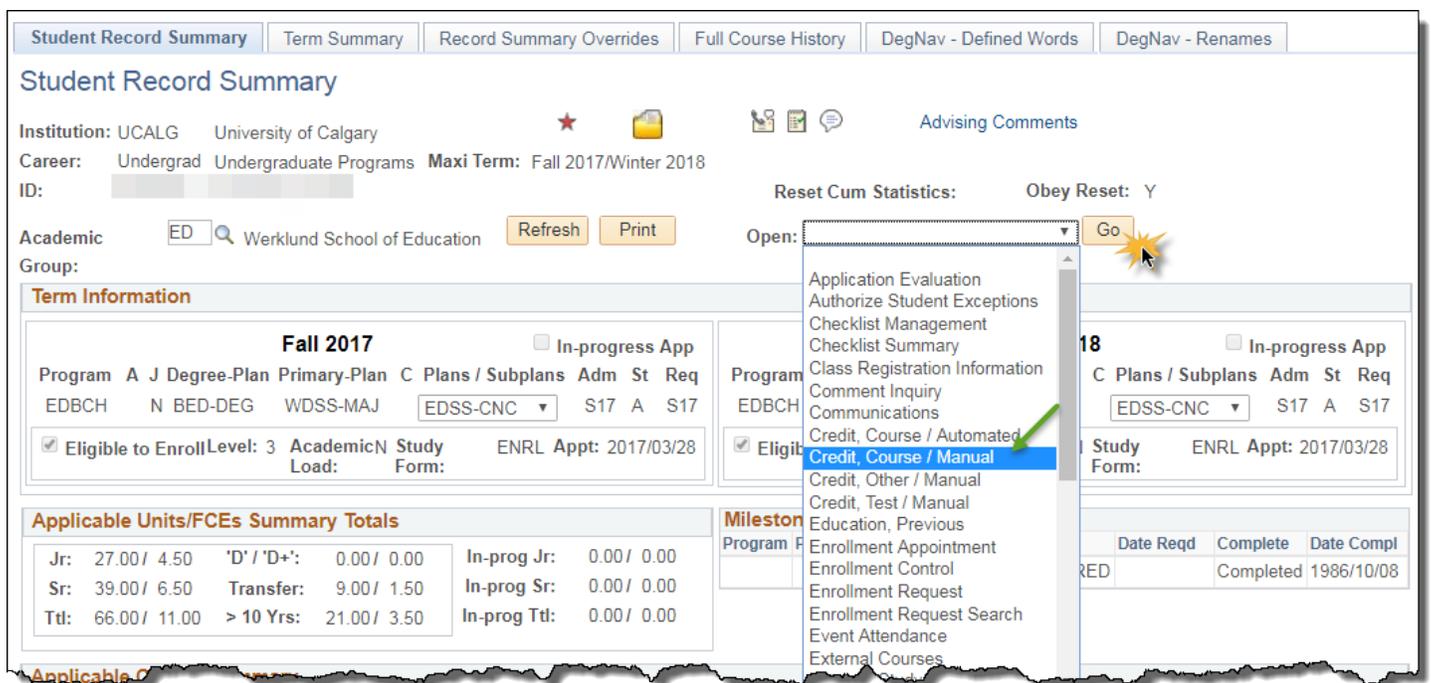


Entering the Application Directly in to the Student Administration System

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)

Transfer Course Entry | Course Credits by Term

★ 📁

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 Include in GPA

Academic Plan

Source Information

*Credit Source Type Manual

Source Institution Athabasca University

School Type LOP Letter of Permission

Transfer Credit Term Find | View All First 1 of 1 Last

*Articulation Term

Transfer Credit Term Find | View All First 1 of 1 Last

*Articulation Term P18

Find | View All First 1 of 1 Last

*Group*Seq#	Incoming Course	Equivalent Course
<input type="text" value="1"/> <input type="text" value="1"/>	Year <input type="text" value="2018"/> Ext Term <input type="text" value="SPR"/>	Course ID <input type="text" value="134333"/> PSYC
Status:	Subject <input type="text" value="PSYC"/>	Offer Nbr <input type="text" value="1"/> 205
Accepted	Course Nbr <input type="text" value="289"/>	Units Transferred <input type="text" value="3.00"/>
Details	Description <input type="text"/>	Grading Scheme <input type="text" value="UGD"/> UGRD
Comments	Units Taken <input type="text" value="3.00"/>	Grading Basis <input type="text" value="TRN"/> Transfer
	Grade Input <input type="text" value="LOP"/>	Official Grade <input type="text" value="LOP"/> LOP
		Repeat Code <input type="text"/>
		Designation <input type="text"/>
		<input checked="" type="checkbox"/> Include in FA WI Stats

- 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.

Equivalent Course Information

Incoming Course
Term Year: 2018 SPR
Subject: PSYC Course Nbr: 289
Description:
Units Taken: 3.00 Grade Input: LOP Crse Level:
OK
Cancel

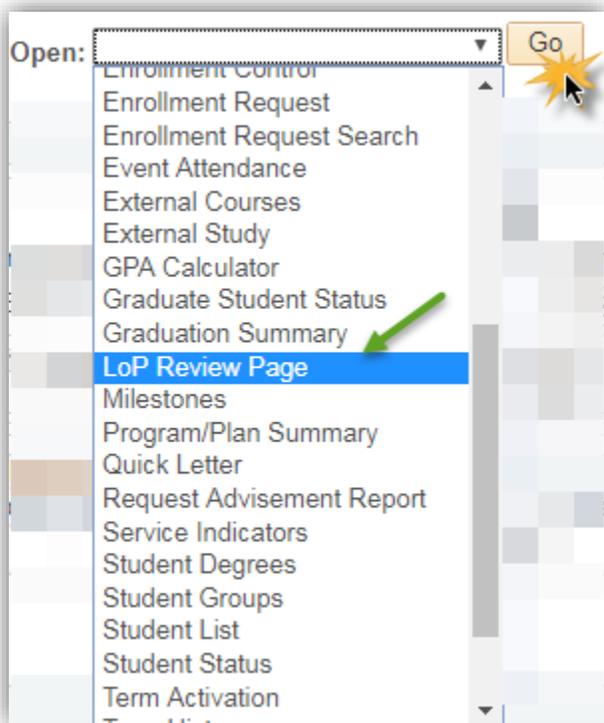
Equivalent Course
Course ID: 134333
Offer Nbr: 1 PSYC 205
Units Transferred: 3.000
Grading Scheme: UGD Undergraduate
Grading Basis: TRN Transfer
Official Grade: LOP LOP
Repeat Code:
Designation:
 Include in FA WI Stats
Valid Attempt
Earn Credit
Include in GPA
Units Att: Yes
Clear

LOP Manual Credit Course Dates
From Date: 2018/05/01 To Date: 2018/06/29

- 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.

Letter of Permission Review

ID

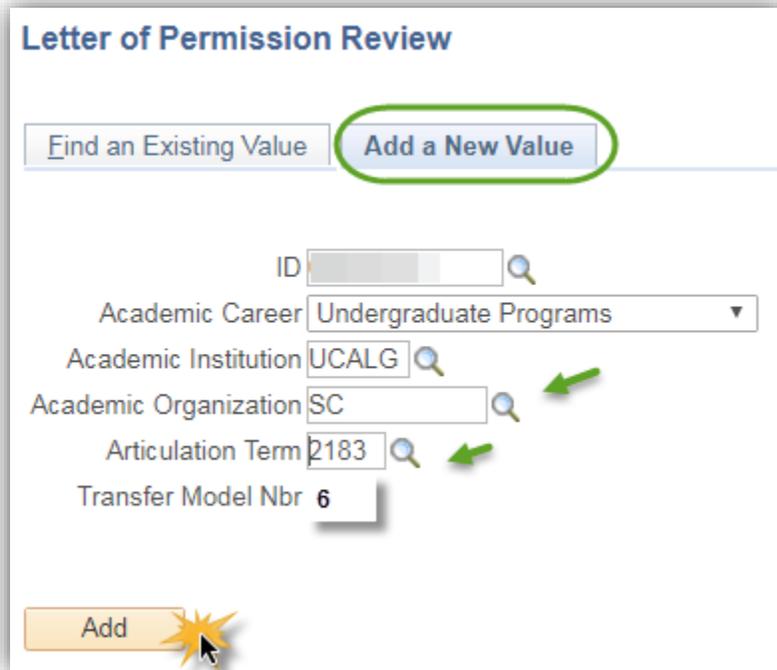
Academic Career

Academic Institution

Academic Organization

Articulation Term

Transfer Model Nbr



- 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.

Letter of Permission Summary

Letter of Permission Summary

★

Letter of Permission Summary

Institution UCALG University of Calgary	Acad Org ED	Werklund School of Education
Career UGRD Undergraduate Programs	Term 2183	Spring 2018 Model Nbr 6

Processing Information

LOP Source Staff	Date 2018/03/13	<input type="checkbox"/> Fee	Generate LOP
Faculty Approval Pending	Date	<input type="checkbox"/> LOP Printed	<input type="checkbox"/> Send as Email
Admission Approval Pending	Date	<input type="checkbox"/> Transcript Processed	
		<input type="checkbox"/> Eligible for Convocation	
		<input checked="" type="checkbox"/> Have read the important information first	
		<input checked="" type="checkbox"/> Have given permission to order APAS transcripts	
Reason for Request Required to complete my degree requirements			

[Add/View LOP Comments](#)

Host Institution Information

Organization 00103340	University of Alberta	Order Transcript
-----------------------	-----------------------	----------------------------------

Host Institution

Country CAN	Canada
Address 1	<input style="width: 90%;" type="text" value="Office of the Registrar"/>
Address 2	<input style="width: 90%;" type="text" value="2nd Floor Administration Building"/>
Address 3	<input style="width: 90%;" type="text"/>
Address 4	<input style="width: 90%;" type="text"/>
City	<input style="width: 90%;" type="text" value="Edmonton"/>
Province/State	<input style="width: 90%;" type="text" value="AB"/>
Postal Code	<input style="width: 90%;" type="text" value="T6G 2M7"/>

[Transfer Credit Model Details](#)

EDI Request Data

Requests
Response Reason
Name
Details

[Personalize](#) | [Find](#) | |

[First](#) | [1 of 1](#) | [Last](#)

External Org ID	Name	Tracking ID	Status	Last Changed	Hold Type	Specific Date	APAS Course Title
1			Status				

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

*Transcript Level

Target Information

*Academic Program Science Bachelor + -

Academic Plan

Apply Agreement

Source Information

*Credit Source Type:

External Org ID Athabasca University

Data Source

Transfer Credit Term
Find | View All
First 1 of 1 Last

*Articulation Term 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

Add/View Comments

Save
Return to Search
Notify
Add
Update/Display

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 compared 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		OHIGH	High
Fourth Attempt	A	OVRD			LOW

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:

Course Details																
Course Nbr	Course Topic ID	Grade	Units	Term	Taken Order	TC	TC Grp	Articulation Term	Earn Credit	Include in GPA	Add Dt	Repeat Code	Designation	Course ID	Class Nbr	
GLGY 201	Lecture 02	B+	3.00	2177	F17				Y	Y	2017/09/05			122140	70590	
MATH 249	Lecture 01		3.00	2181	W18				Y	Y	2017/10/05			125996	10023	
MATH 249	Lecture 01	D	3.00	2173	P17				Y	Y	2017/03/07			125996	30062	
MGST 217	Lecture 09		3.00	2177	F17				Y	Y	2017/05/14			162605	75812	
BELS 101	Lecture 02		3.00	2177	F17				Y	Y	2017/09/05			162605	75812	

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.