Entering Student Exceptions: Requirement Change

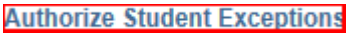
SA – Academic Advisement

The following is the process for entering student exceptions. The Requirement Change student exception type is used to change the specified units in a requirement. A common example of this occurs when a student has been permitted to use more than the usual maximum number of 200-level courses toward their degree requirements.

1. Click the **Academic Advisement** link.

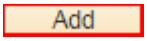
2. Click the **Student Advisement** link.

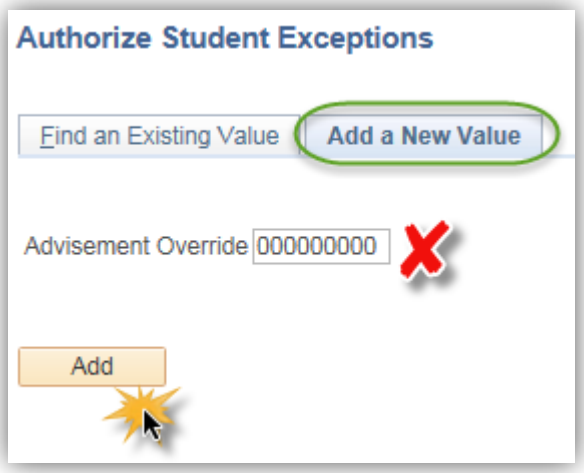
3. Click the **Authorize Student Exceptions** link.

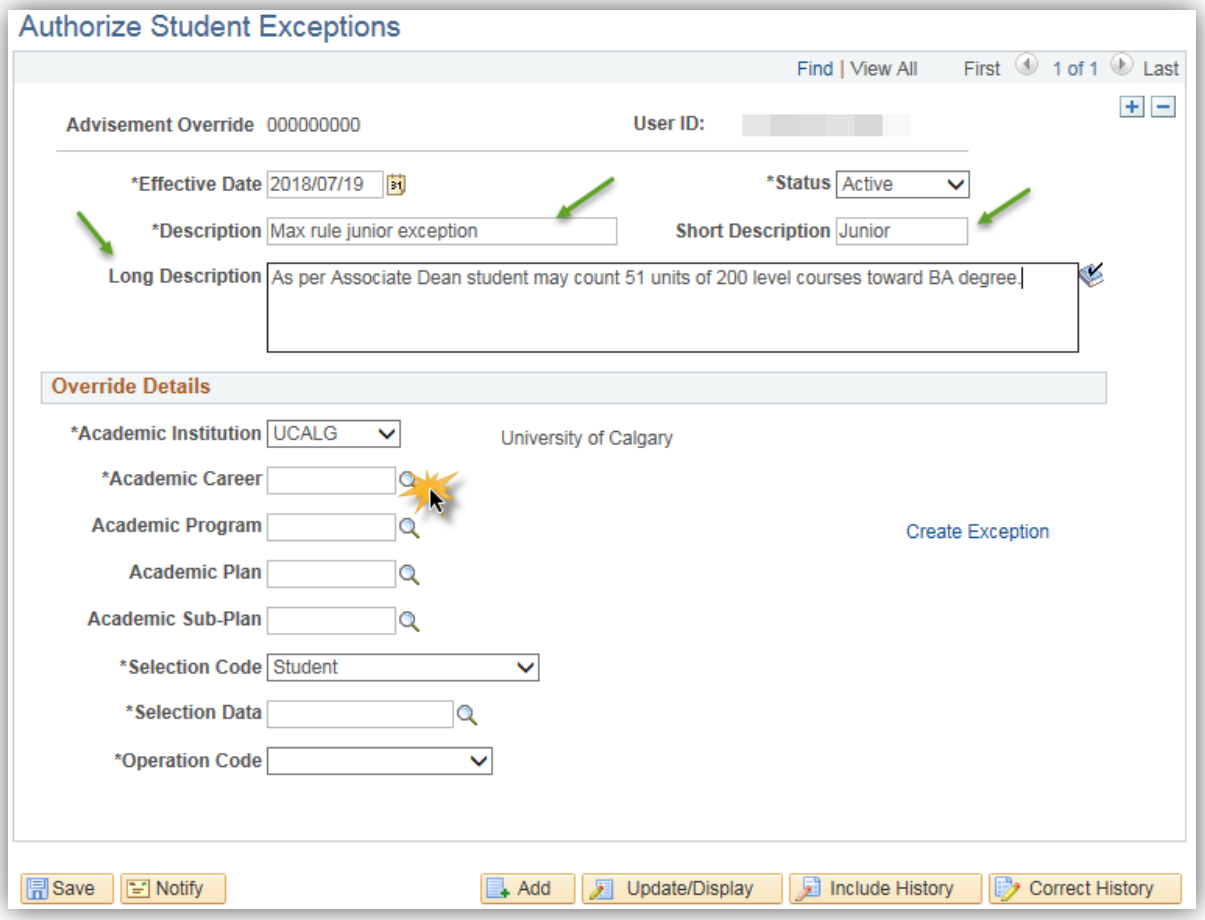
4. Click the **Add a New Value** tab.

5. Do not change the Advisement Override field value. Click the **Add** button.



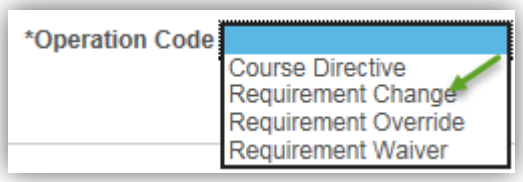
6. In the Description field enter a brief description of the exception. In the Short Description field enter the course or requirement involved (e.g. Junior). In the Long Description field explain the exception in a way that will make sense to a student as this will be visible to the student in the Advisement Report. **NOTE:** Faculty Advising offices may have established standardized wording protocols for these three fields. Check with your supervisor for details. Click the **Look up Academic Career** button and click either the **UGRD** or **GRAD** link, depending on the student.



7. If the exception is specific to a student's major, minor, or Area of Study, enter the appropriate value under Academic Plan. If the exception is not specific to one of these areas (as in this example), leave the academic plan blank.

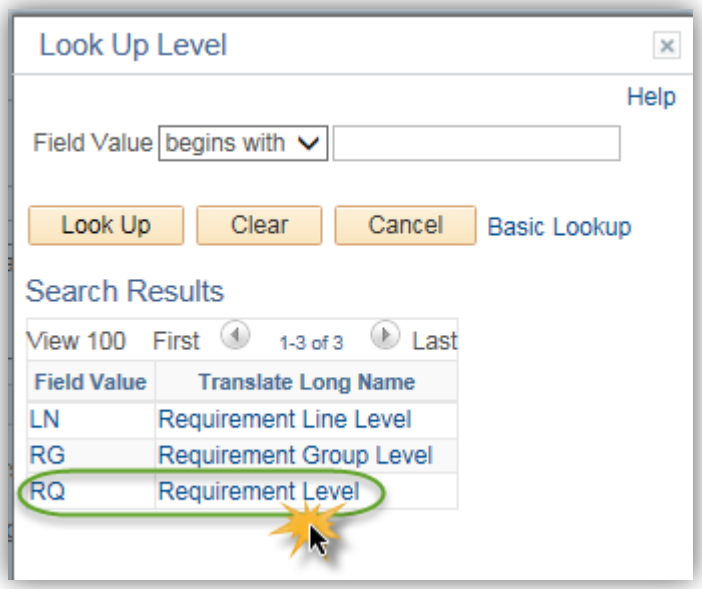
8. In **Selection Data** enter the student's ID number (e.g. 10159108). Note: *In the example the data is scrambled for FOIP reasons and the students name is not the actual student.*

9. Click the **Operation Code** list. A list of Operation Codes display:

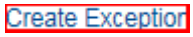


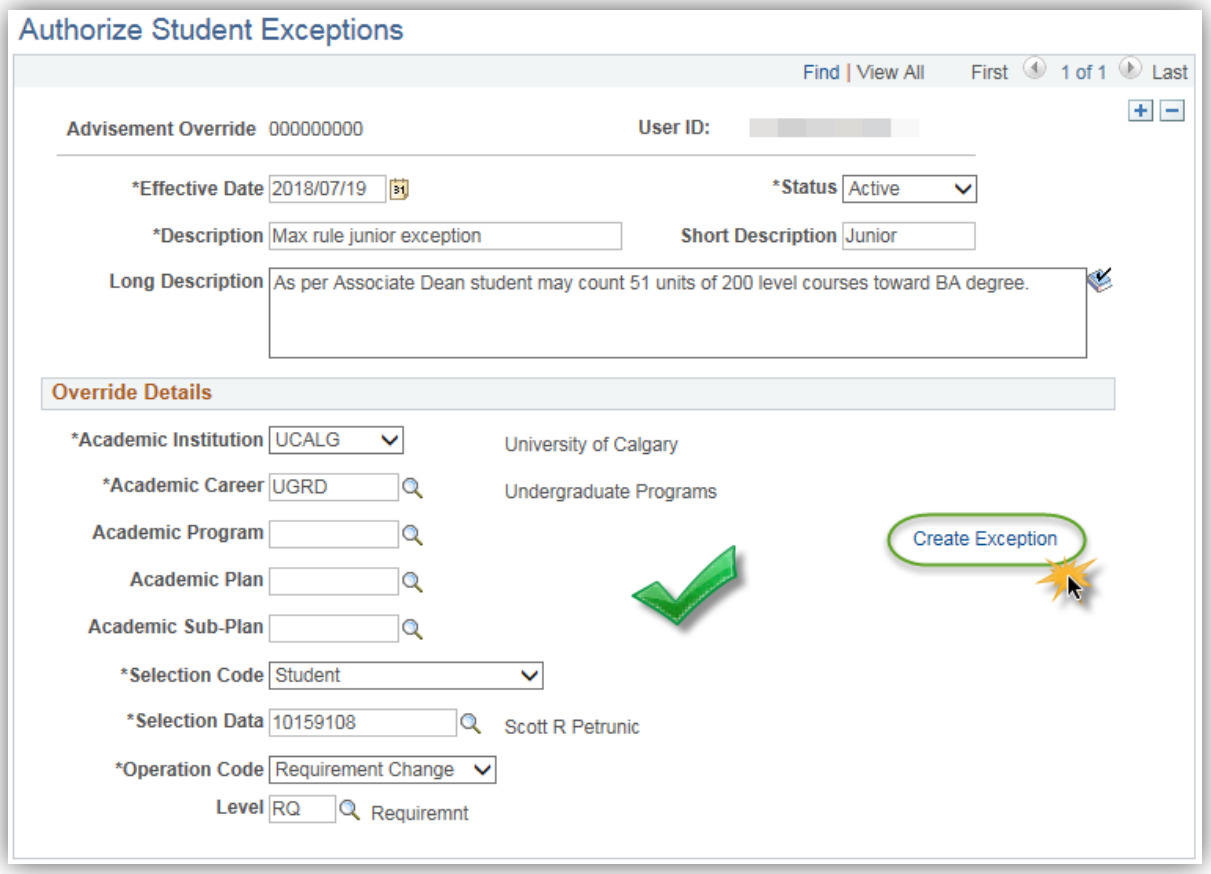
10. Click the **Requirement Change** list item.

11. Click the **Look up Level** button. For each Student Exception you will need to decide whether you are changing the unit total at the RG/RQ/LN level. This example it is at the RQ level. Click the **RQ** link.



12. After all values are entered on Authorize Student Exceptions you may create the exception. Click the **Create Exception** link.

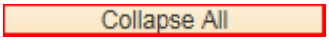




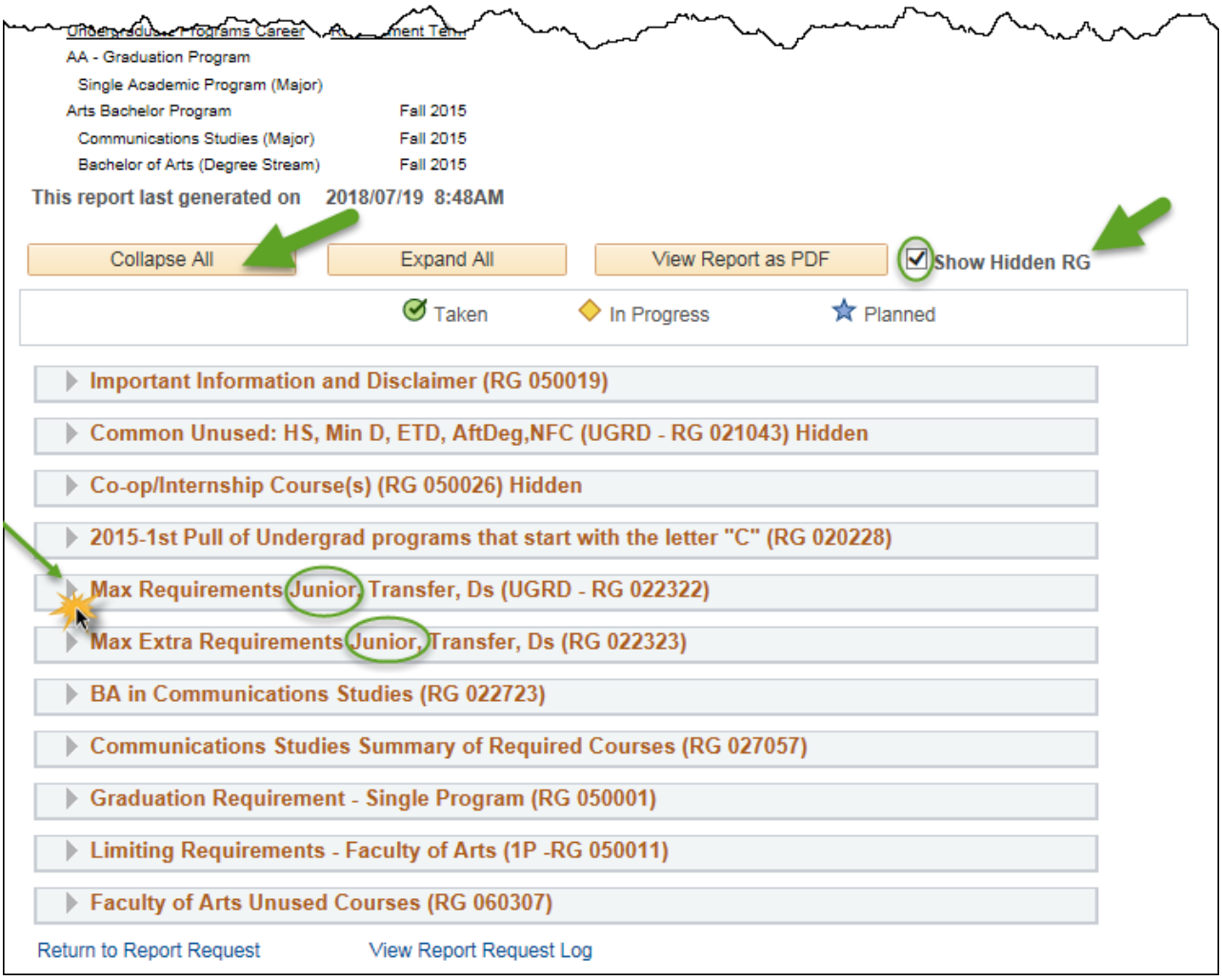
13. At this point you need to reference the **Requirement Group** number from the Academic Advisement Report. Therefore you must open a new window and navigate to Academic Advisement > Student Advisement > Request Advisement Report. *Detailed instructions for Academic Advisement Report are available on the Student and Enrolment Services, Student Administration (PeopleSoft Campus Solutions) website.*

14. On Advisement Report select **Show Hidden RG**. Click **Collapse All** to see the hidden RG's in order to find the max rule for which the student has an approved exception. In this example the student has been permitted to exceed the number of 200-level course units normally allowed to count toward degree requirements (51 units rather than 48). Click the **Show Hidden RG** option.

15. Click the **Collapse All** button.



16. Note that two Max Requirement RG's include the word 'Junior'. The first instance, Max Requirements Junior, Transfer... controls the number of junior courses that are allowed in the degree program. Expand this RG by clicking on the triangle at left. Click the **Expand section Max Requirements Junior** link.

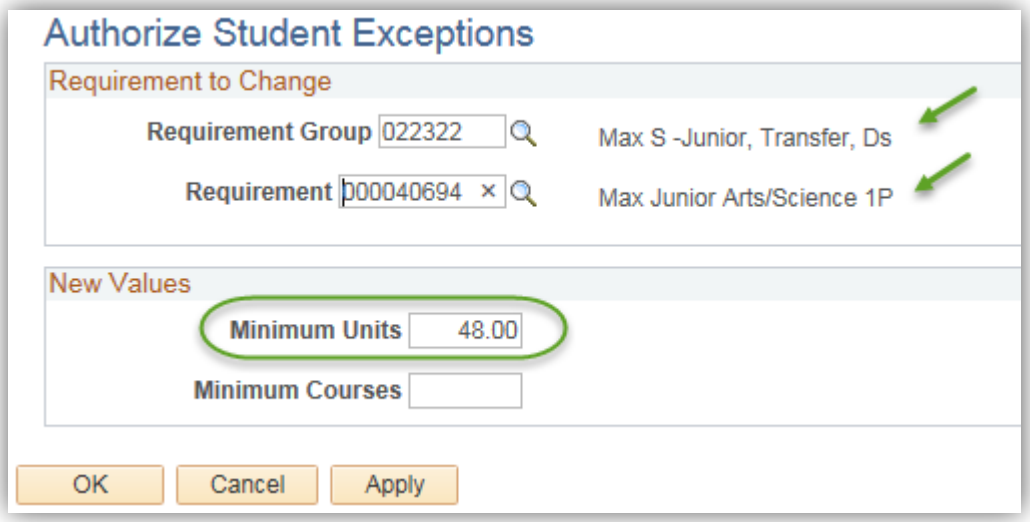


17. **Important:** Make a note of the RG number **(e.g. 022322)** as this will be required in the exception report. Scroll down to view the max junior course units. If applying an exception is being applied to something other than Junior courses, make note of the RG and RQ number of the applicable portion.

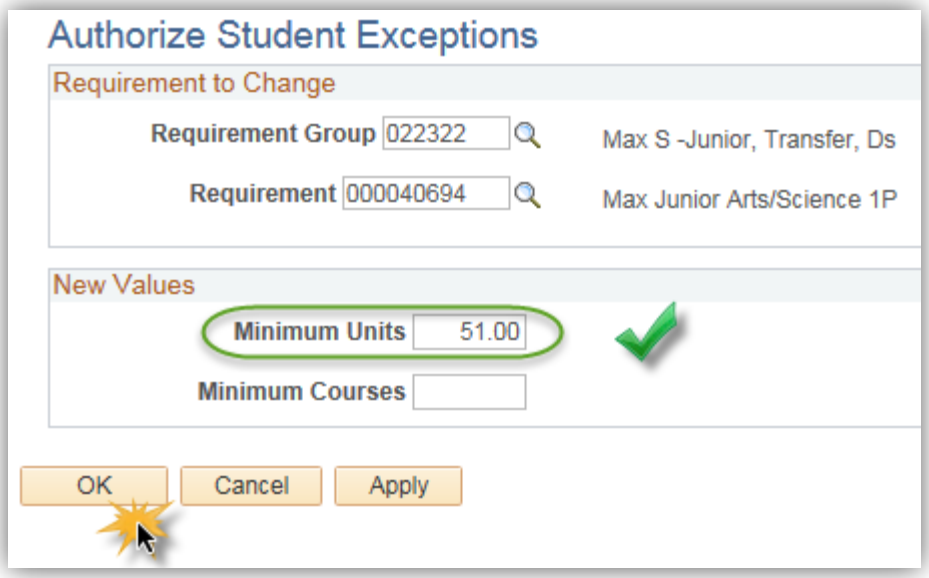
18. The Max Junior Course Units RQ confirms that the maximum junior course units allowed is 48 units. **Important:** Make a note of the **Max Junior Course Unit RQ** number **(e.g. 000040694)**, as this number and the RG number are required in the next step.

19. Next, return to the previous window to **Authorize Student Exceptions**.
20. Enter the RG number from the Requirement Report that you made a note of earlier from Max Requirements Junior **(e.g. 022322)** into the **Requirement Group** field.
21. Enter the Requirement Group number from the Request Advisement Report that you made a note of earlier (e.g. 000040694) into the **Requirement** field.

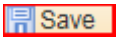
22. After entering both the Requirement Group and Requirement numbers in **Requirement to Change** the New Values in Minimum Units auto populates to 48.00.

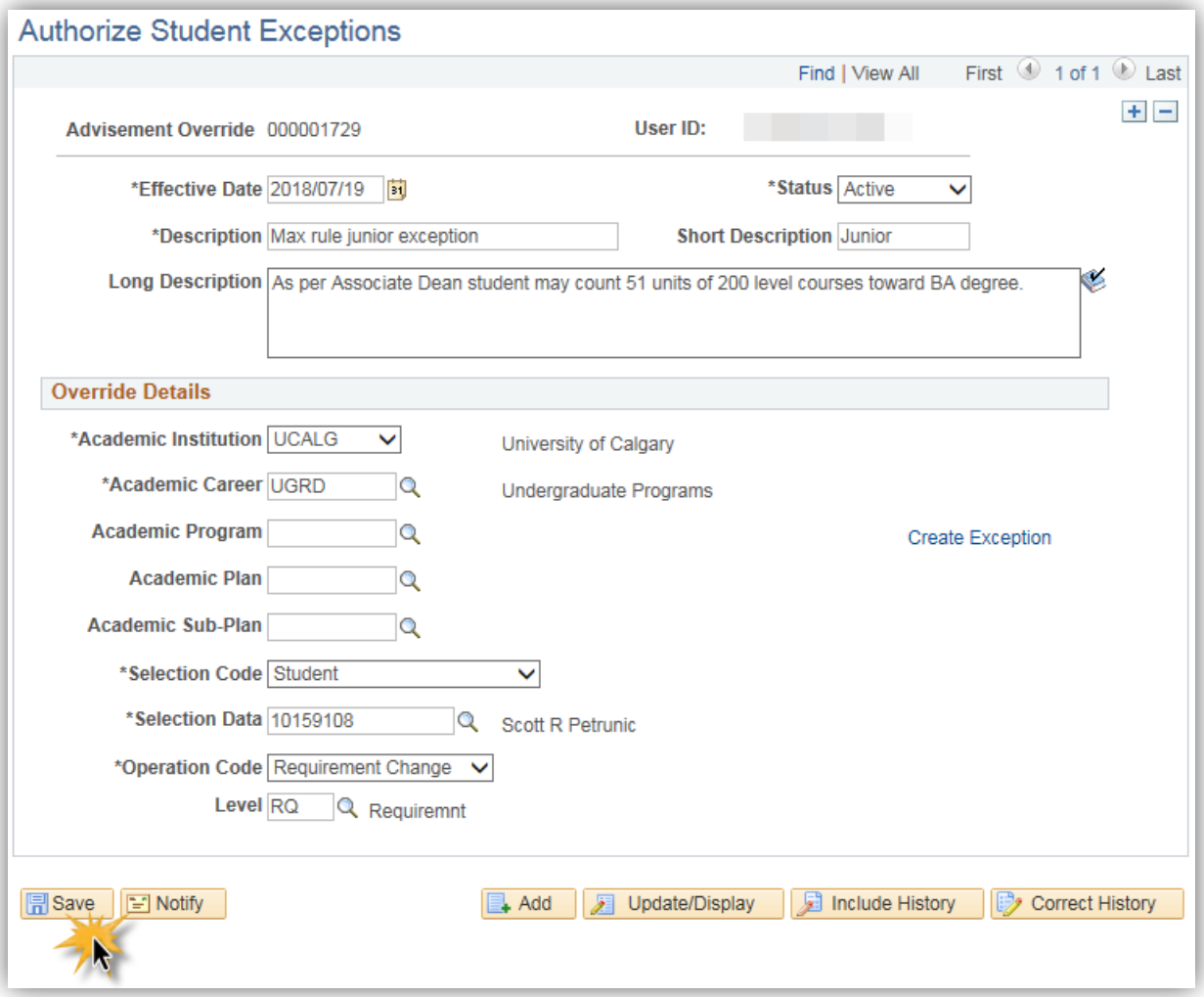


23. In Minimum Units delete the units (48.00) and replace the Minimum Units value with the number of units the student has been approved for **(e.g. 51.00)**. Click the **OK** button.

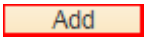


24. On Authorize Student Exceptions **save** the exception and navigate back to the Request Advisement window. Click the **Save** button.

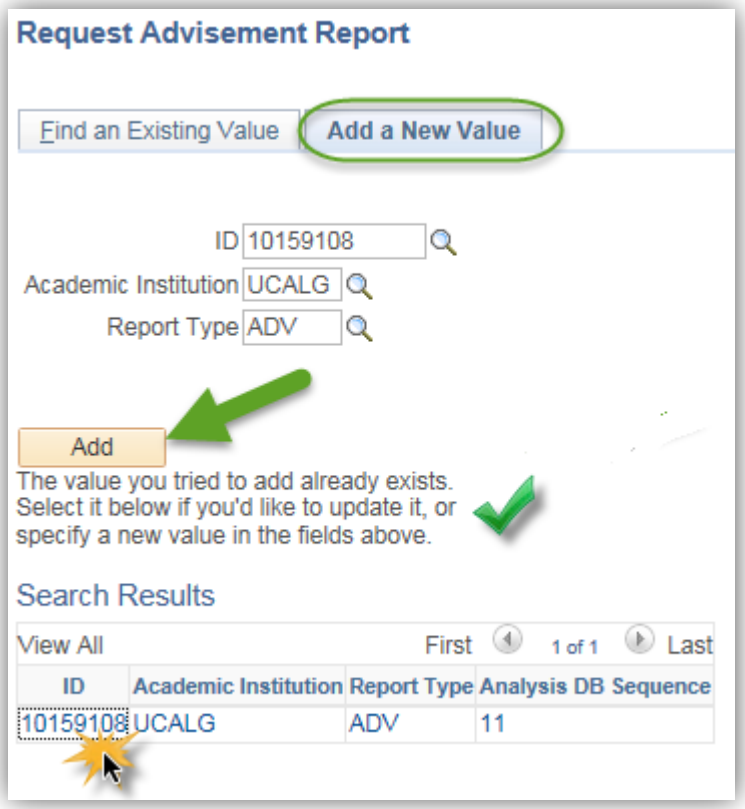




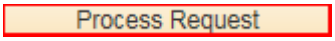
25. Complete another **Request Advisement Report** to view the updated units. Repeat the process to Request Advisement Report (enter the student ID number and the Report Type (ADV). Click the **Add** button.



26. Since the Request Advisement Report has been previously requested you will be prompted to select it to update. Click the **Student ID** link.

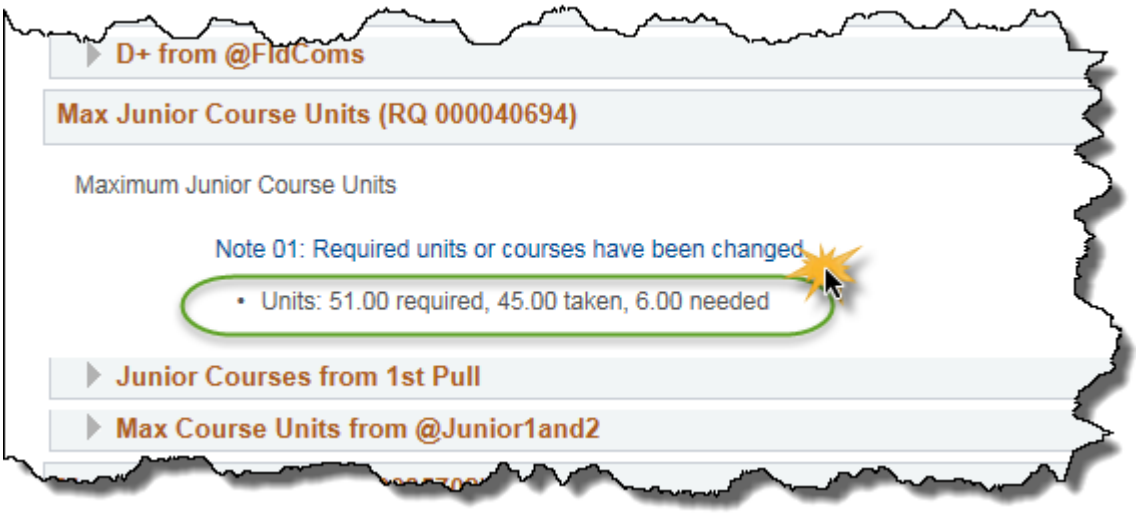


27. Repeat the Process Request to generate an updated request. Click the **Process Request** button.

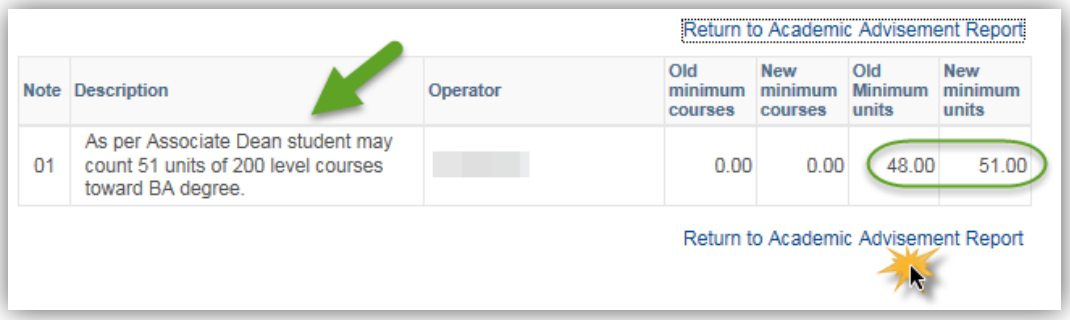


28. As before, remember to select **Show Hidden RG** and click **Collapse All** button.
29. Click the **Expand section Max Requirements Junior...** link.

30. **Important:** Note the Maximum Junior Course Units displays the change in the Units = 51.00 from the exception just entered. Additionally there is a note "***Note 01: Required units or courses have been changed.***" Clicking on the link will navigate to the line information entered in the exception request. Click the **Note 01:** link.



31. The Description is the long description entered from the exception request. Also indicated are the old minimum units (48.00) and the new minimum units (51.00). Click the **Return to Academic Advisement Report** link.



32. If the approved exception only needs to be entered in one place, STOP HERE. If the approved exception needs to be entered in multiple RGs, such as in this example for exceeding the junior limit, repeat the process for the additional RG. The steps for the second RG in this example continue in the subsequent steps.

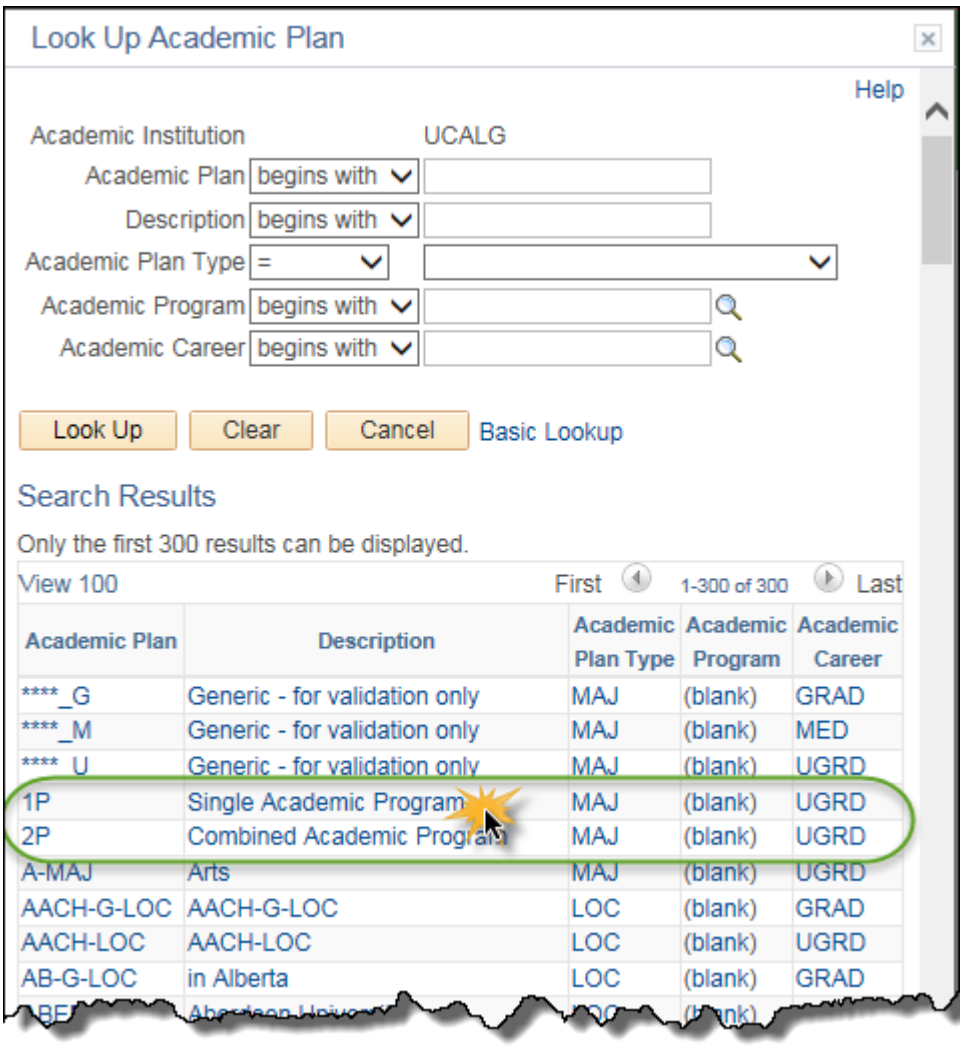
    From **Request Advisement Report** navigate back to the **Authorize Student Exception** window. Entry of an additional student exception is now required to assure that the exception is visible to the student (otherwise, it will appear to the student that they have exceeded their junior limit). Using the breadcrumbs navigate back to enter another exception request. Click the **Authorize Student Exceptions** menu.

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

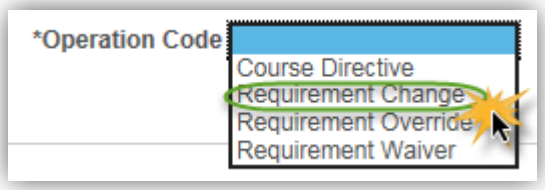
34. Click the **Add** button.

35. Enter the applicable Description, Short Description and Long Description text as before and enter the applicable Academic Career (e.g. UGRD). Click the **Look up Academic Plan** button.

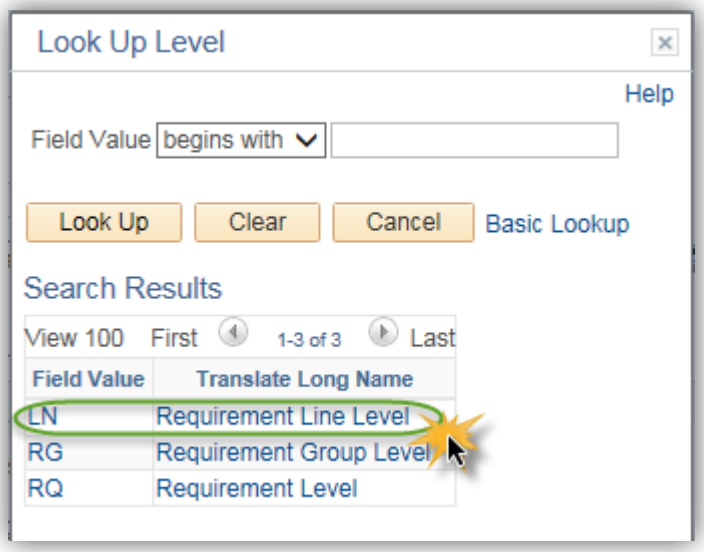
36. On Look Up Academic Plan select either 1P (Single Academic Program) or 2P (Combined Academic Program). For this example click the **1P** link.



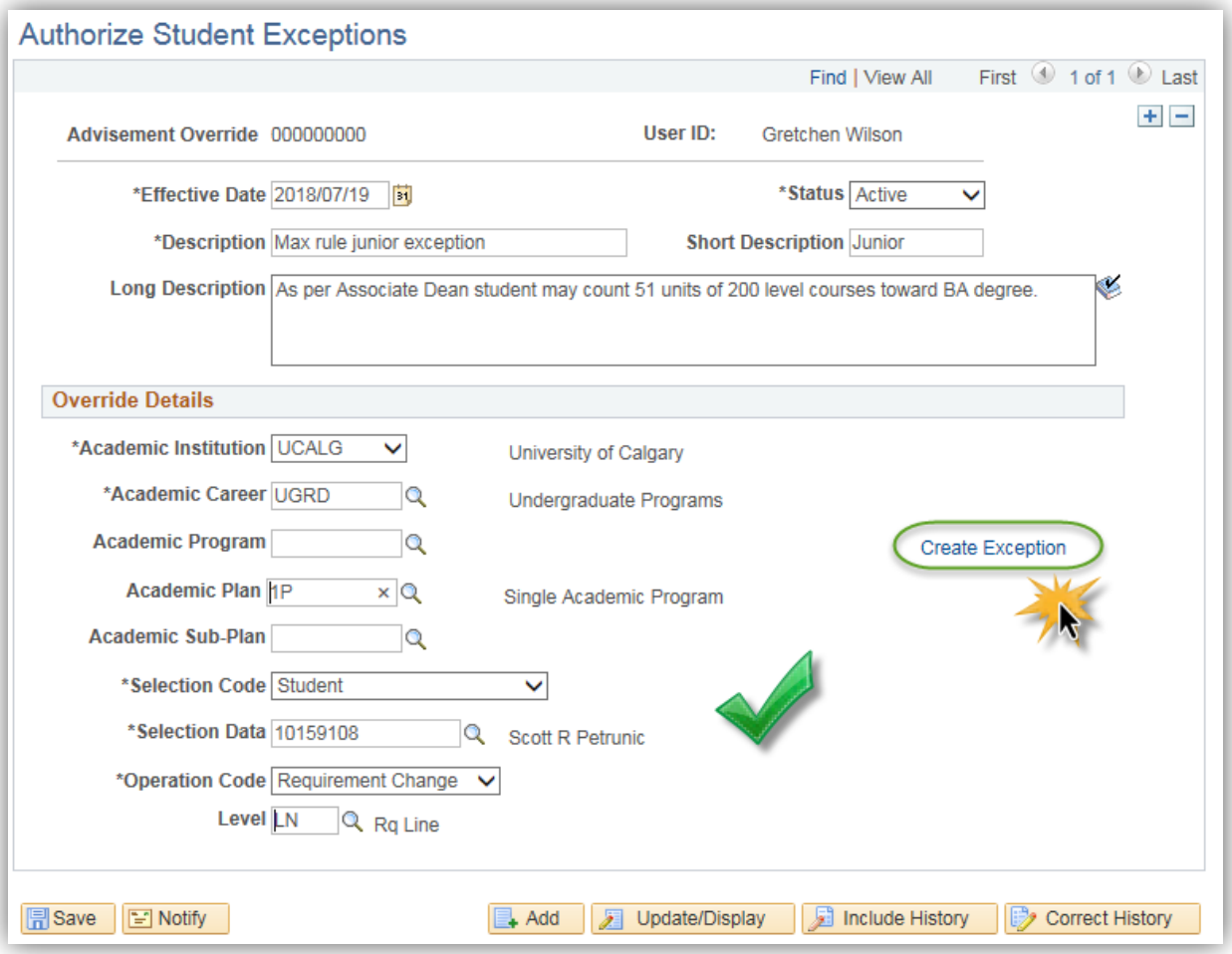
37. Enter the Student ID number in the Selection Data field (e.g. 10159108). Click the **Operation Code** list. Click the **Requirement Change** list item.



38. Click the **Look up Level** button. For each Student Exception you will need to decide whether you are changing the unit total at the RG/RQ/LN level. For this example it is at the LN level. Click the **Requirement Line Level** link.

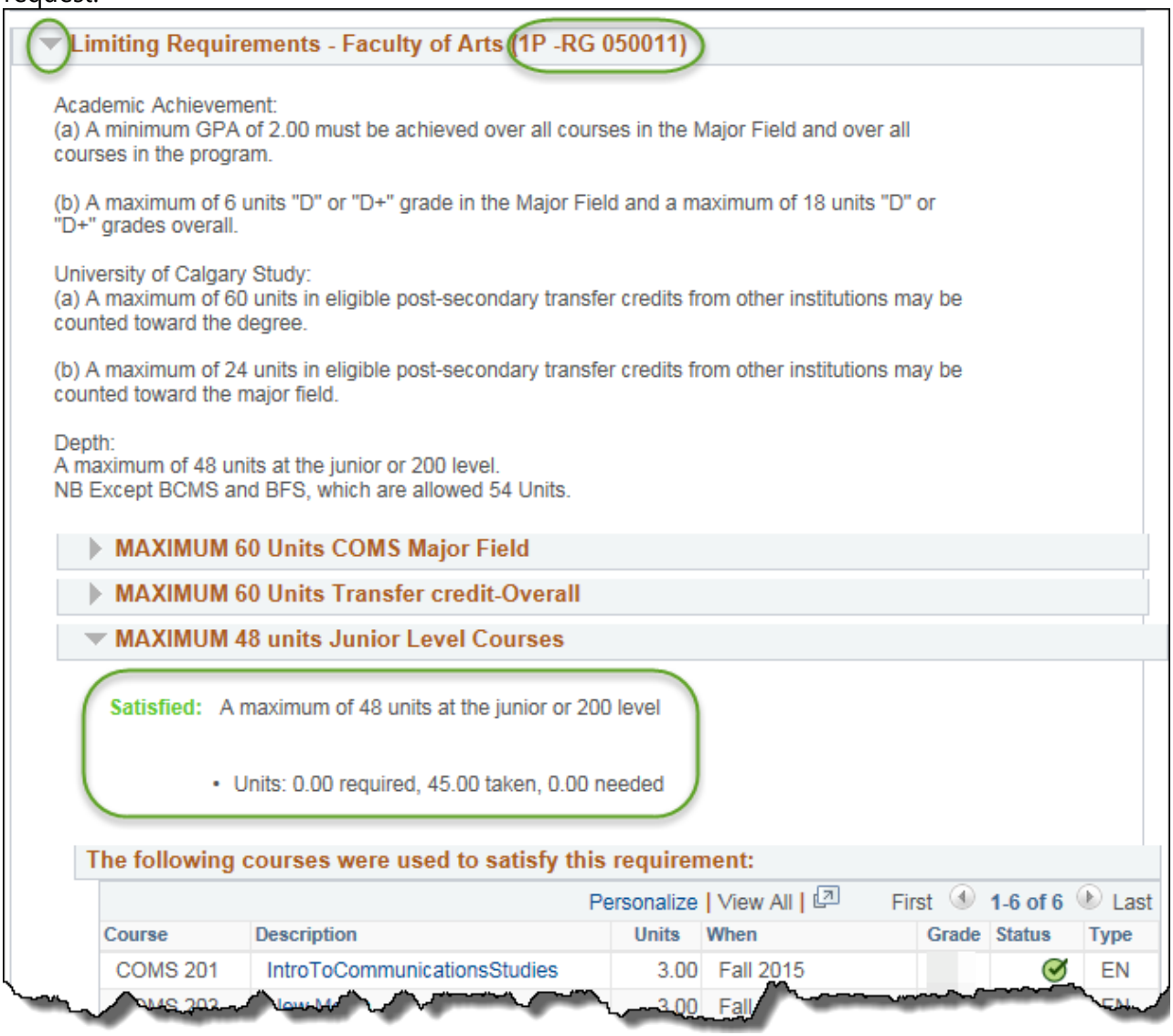


39. After all values are entered you can create the exception. Click the **Create Exception** link.



40. Navigate back to the previous **Request Advisement Report** (Window). As before, select **Show Hidden RG** and **Collapse All** if not already completed. Click the **Expand section Limiting Requirements - Faculty of Arts** link.

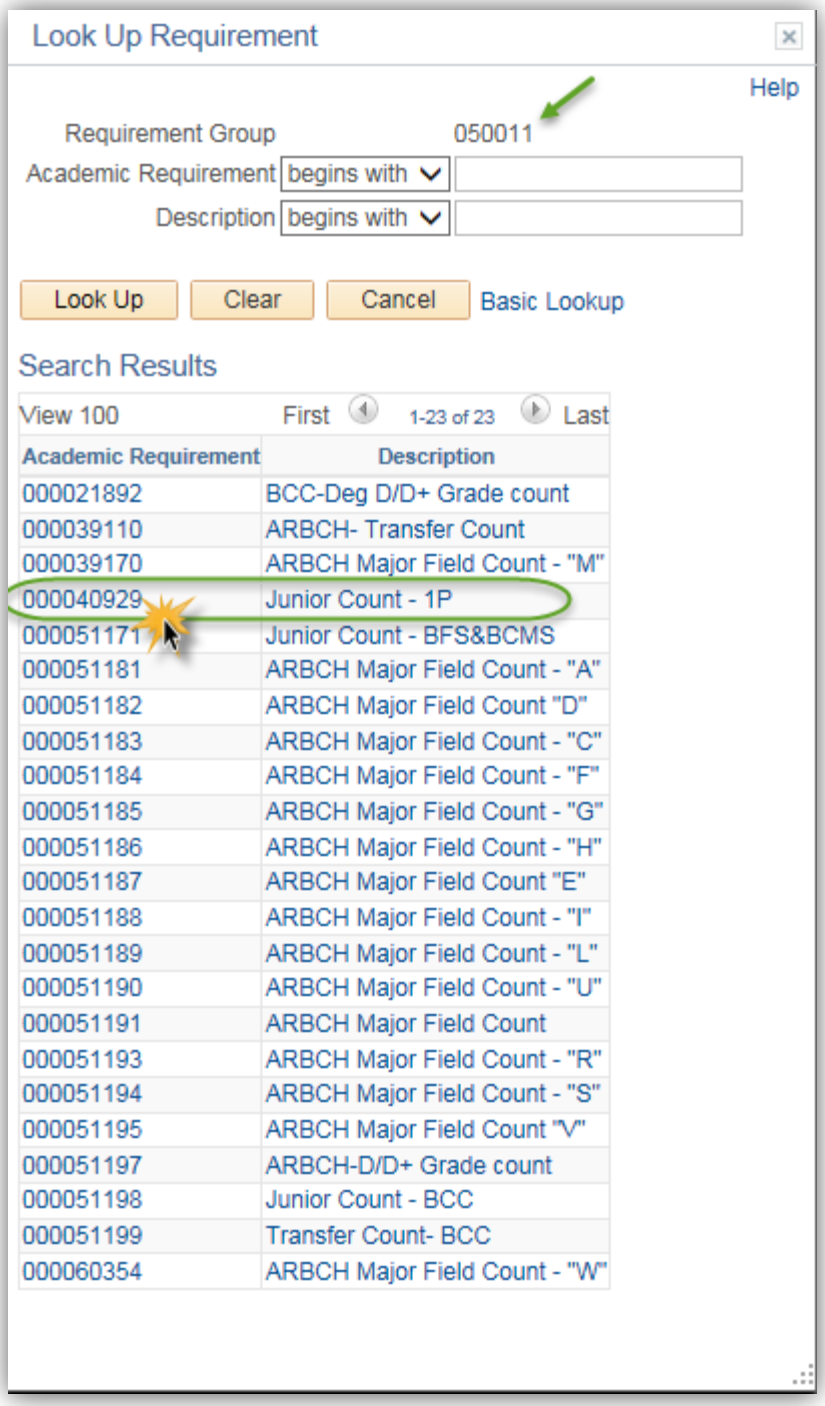
41. Note the Limiting Requirements RG number **050011** as this will be required in Create Exception request.



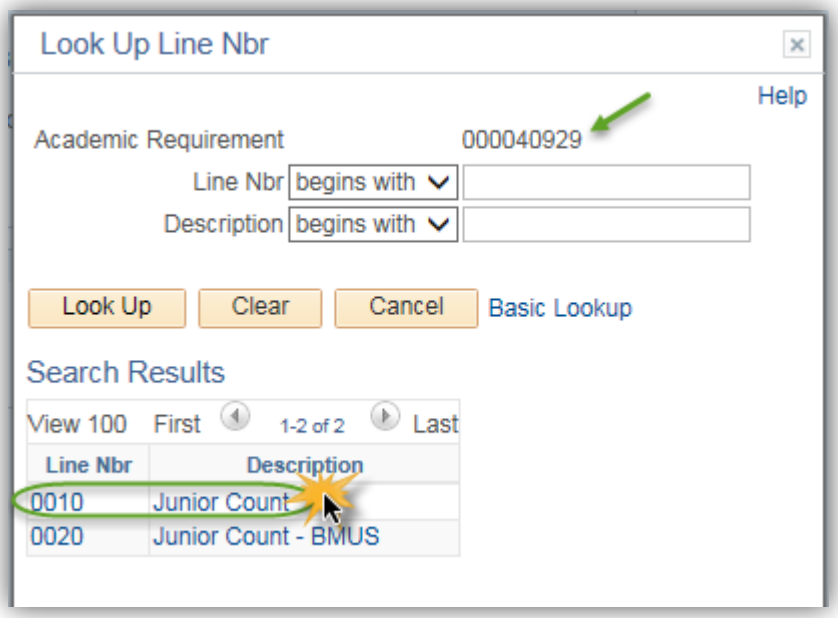
42. Navigate back to **Authorize Student Exceptions** and Enter the RG number **(e.g. 050011)** into the **Requirement Group** field. Note the Requirement Group name auto populates after entering the RG number (e.g. ARBCH Limiting Requirements).

43. Click the **Look up Requirement** button.

44. On Look Up Requirement select the Requirement from the list (in this case, 000040929 – Junior Count 1P). Note the Requirement Group number is indicated. Click the **000040929** link.

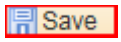


45. Click the **Look up Line Nbr** button. Note the Academic Requirement number is indicated. Click the **0010** link.



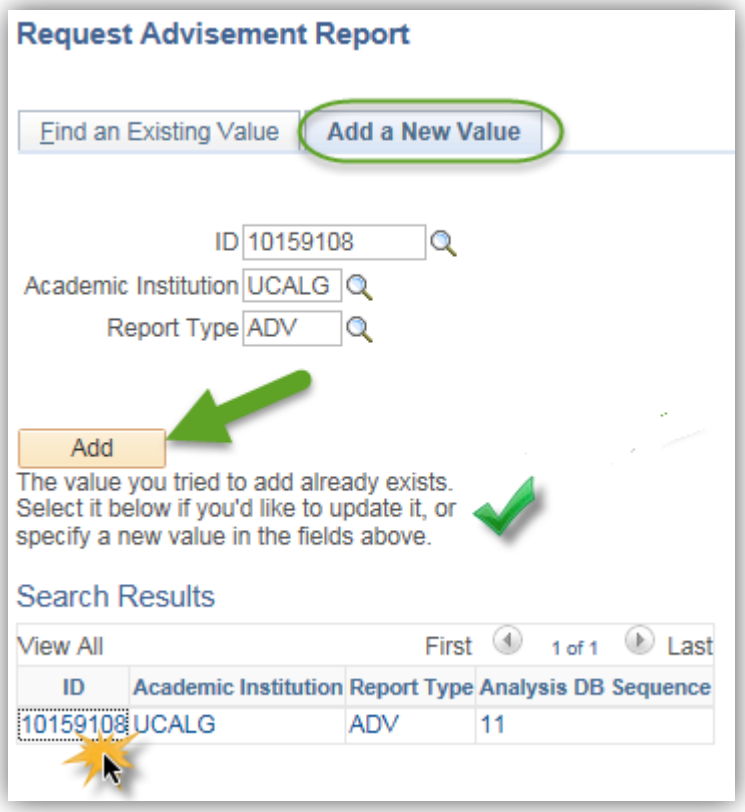
46. Once the values have been entered for Requirement Line to Change the **Maximum Units Allowed = 48** auto populates in New Values. Delete the maximum units (48.00) and enter the new units (51.00). Enter the desired information into the **Maximum Units Allowed** field (e.g. 51.00). Click the **OK** button.

47. Click the **Save** button.

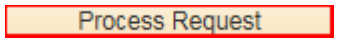


48. Next navigate back to **Request Advisement Report** to process another report to reflect the new exception. Click the **Add a New Value** tab and complete the values (Student ID and Report Type = ADV).

49. Since the Request Advisement Report has been previously requested you will be prompted to select it to update. Click the **Student ID** link.

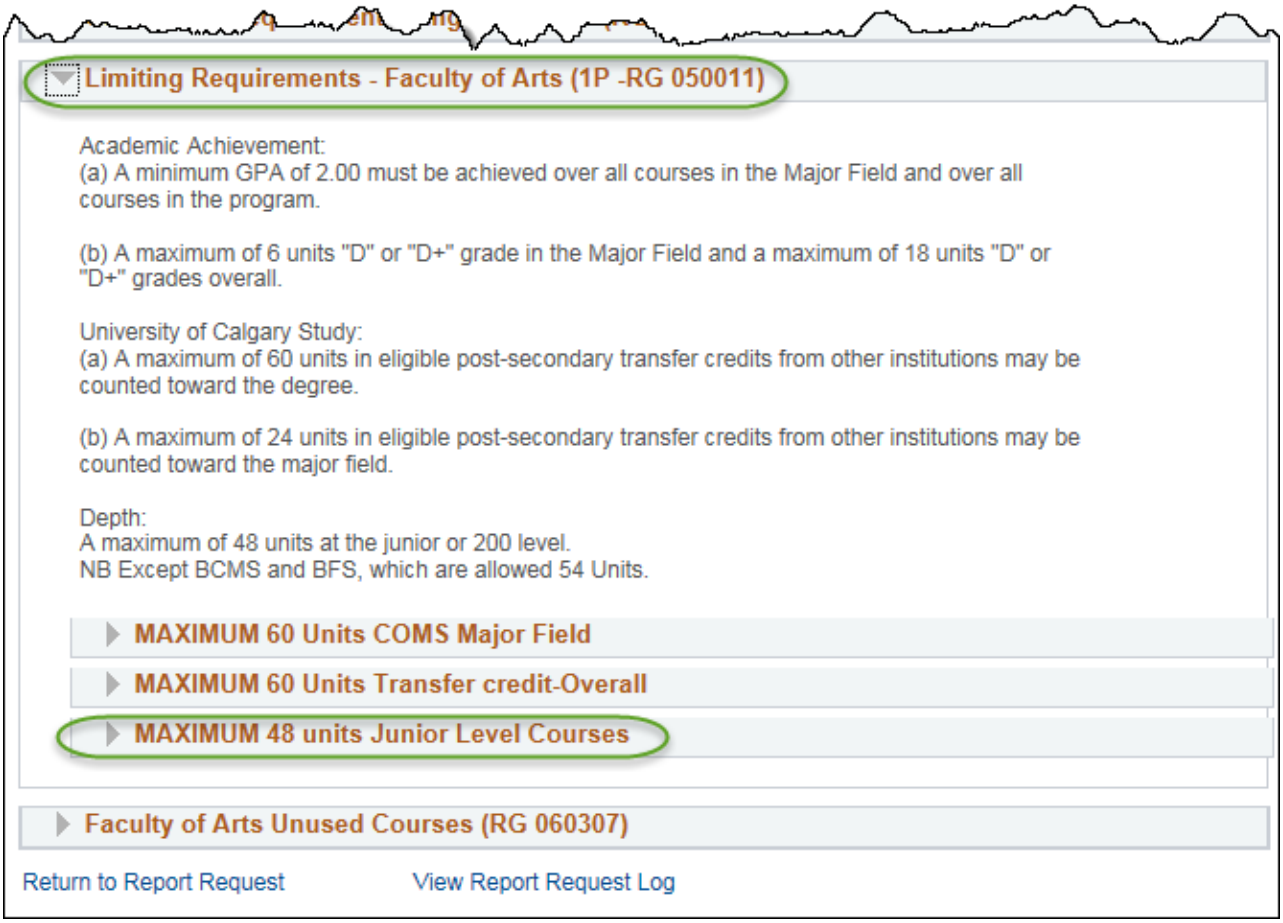


50. Click the **Process Request** button.

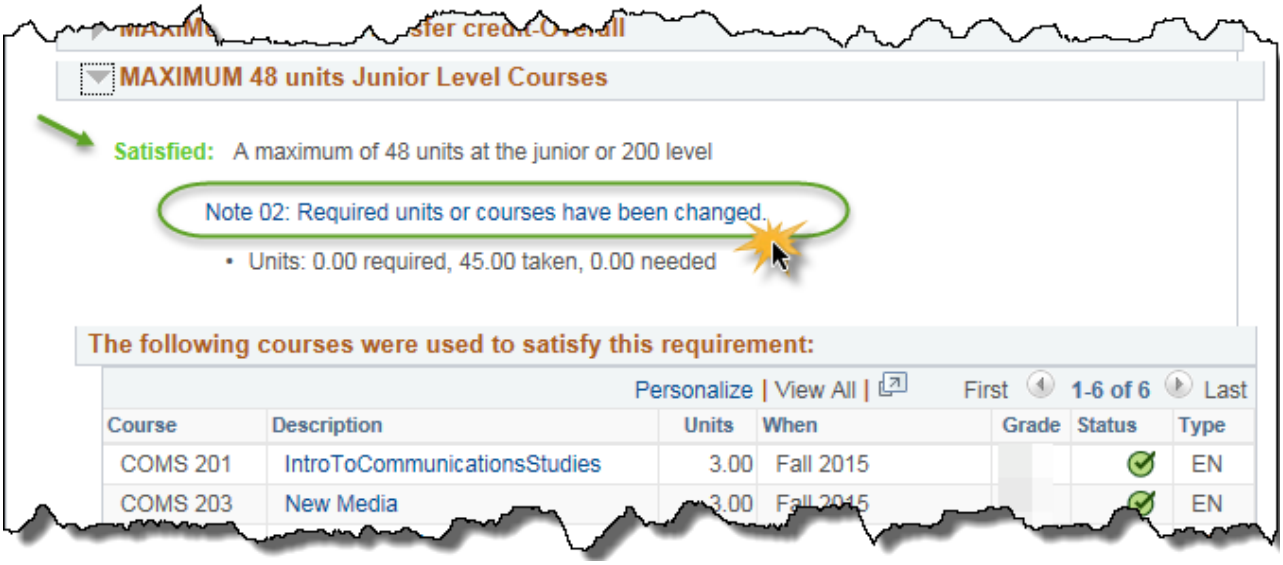


51. As before, select **Show Hidden RG** and **Collapse All** if not already completed.

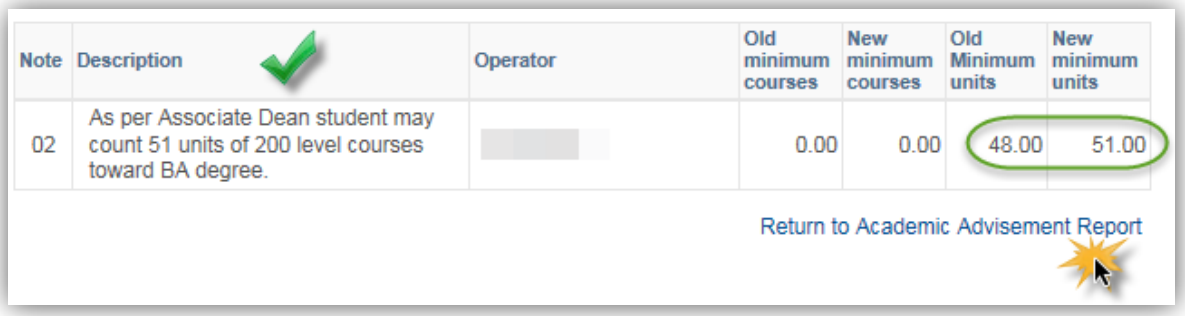
52. Click the **Expand section Limiting Requirements - Faculty of Arts** link and click the **Expand section MAXIMUM 48 units Junior Level Courses** link.



53. In the Limiting Requirements RG you will still see 48 units unchanged by the exception; however this is misleading. Note the requirement now indicates **'Satisfied'**. Also, in the Limiting Requirements RG, displayed is a Note ***'Note 02: Required units or courses have been changed.'*** Click the **Note 02:** link.



54. Clicking on Note 02 displays the Long Description explanation you entered, which clarifies that the exception is successfully in place. Also indicated are the Old Minimum units (48.00) and the New minimum unit (51.00). Click the **Return to Academic Advisement Report** link.



For the corresponding online learning, consult the Student and Enrolment Services, Student Administration (PeopleSoft Campus Solutions) training website.

End of Procedure.