# Change Control

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<td>1.0</td>
<td>Created on 6/16/2008/CAU</td>
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<tr>
<td>1.5</td>
<td>Updated Academic Advising to Degree Progress;Inserted Cover page and added header and footer/CAU</td>
</tr>
<tr>
<td>2.0</td>
<td>Added additional explanations, updated table of contents, added process flow/CAU</td>
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Introduction

We are going to introduce you to the PeopleSoft Degree Progress Report, a tool that will support your advising of students. It is made up of two parts, an advising transcript and an academic audit. We will show you how to produce a Degree Progress Report and how you might use it for various advising situations.

PeopleSoft Academic Advising integrates with the PeopleSoft Student Records application in a number of ways. When you generate a degree progress report for students, the advisement audit engine looks at a lot of course and student data that was set up using the Student Records application, such as courses, student career, program, and plan information, enrollment information and grade information.

Be aware that the present Degree Progress Report was built for the 2004-2005 catalog and forward. Students who have come in under these catalogs years can utilize the degree audit. We will discuss later ways that you can adjust a student’s Career Requirement Term (catalog year), Program (School) Requirement Term, and Plan (major) Requirement Term, and when that may or may not be appropriate.

Academic Structure

It is helpful before viewing the Degree Progress Report to outline the general academic structure as it works in PeopleSoft and in the Audit. Everything to do with the Audit is based on requirements and rules related to a student’s Career, Program, Plan and Sub-Plan. This is what we refer to as “academic structure.”

<table>
<thead>
<tr>
<th>Institution</th>
<th>00759-University of Houston-Clear Lake</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career</td>
<td>Undergraduate (UGRD) or Graduate (GRAD)</td>
</tr>
<tr>
<td>Academic Program</td>
<td>In the Undergraduate and Graduate career, the academic program equals School plus the career (SOEUG)</td>
</tr>
<tr>
<td>Academic Plan</td>
<td>In the Undergraduate and Graduate career, the academic plan is the equivalent of a student’s major, minor or certificate plus the degree type.</td>
</tr>
<tr>
<td>Academic Subplan</td>
<td>In the Undergraduate and Graduate career, the subplan is used to identify concentrations, specializations or certification areas.</td>
</tr>
<tr>
<td>Requirement Term</td>
<td>The student’s requirement term is the equivalent of the Catalog year for the student’s requirements.</td>
</tr>
</tbody>
</table>

In the PeopleSoft student record system, student Careers include: Undergraduate or Graduate. The first phase of implementation is undergraduate plans with graduate plans to
follow. So the first requirements that you will see in the Audit are those that apply to all undergraduate students. These include requirements on residency, upper level course credits, and residency credits. You will also see requirements that apply to all students in Bachelor of Science or Bachelor of Arts degrees.

The next requirements that will appear in the Audit are those that apply to students in a particular Program, or school. These include school rules on grade point averages, grades, electives, etc and Core Curriculum.

The requirements related to a student’s specific major come next in the Audit; these are what we call Plan requirements. These are the actual major requirements and rules that apply to the individual major field of study. Also in this area you will see secondary Plan requirements (double majors), and, if applicable, any Sub-Plan requirements.
How to Print an Academic Advisement Report

We will begin by demonstrating how to print a Degree Progress Report in the PeopleSoft system.

1. Go to Records and Enrollment
2. Click Transcript > Transcript Request
3. Click the Add a New Value Tab
The fields on this page are as follows:

- **Institution**: This should default to 00759 (UHCL code)
- **Transcript Type**: For the degree progress report, select ADVIP. For Business Double Majors, there will be a BPAUG value that will need to be used.
- **Freeze Record**: Not currently used.
- **Override Service Indicator**: The system will ignore student specific service indicators when you process the request. Service indicators that prevent a student from receiving a transcript will not allow a transcript to be processed so in order to view the report, you will need to check the box.
- **Output Destination**: You can let it default. There is a mod that will send the output to a printer directly once it has been processed.
- **Number of Copies**: This field is only available if the output destination is Printer.
- **Future Release**: This is mainly used for official transcript requests.
- **Academic Career**: Becomes available when future release is set to either Degree Confer Date or Grades Post.
- **Term**: Becomes available when future release is set to either Degree Confer Date or Grades Post.
• **Print Date:** current date appears by default as the print date. The field is unavailable if you enter a future release value of Immediate Processing, Degree Confer Date, or Grades Post.

• **Cancel Request:** Select to cancel the print request.

• **Report Format:** There are four options from the drop down box:

  1. **Standard Report Format (Default):** Indicates that the report is printed as hardcopy or delivered to a page. This will show all requirements for a degree audit.

  2. **Analysis Database:** Indicates that the report is written to the analysis database. The report is stored in computer-readable format; therefore application programs can be written against the tables to create modified reports. This will be used primarily by the Degree Audit Coordinator to produce reports for the schools.

  3. **Completed Only:** Indicates that the report contains only those requirements that have been wholly completed. Normally the degree audit report bolds incomplete requirement groups and requirements while completed requirement groups and requirements are not bold.

  4. **Incompleted Only:** Indicates that the report contains only those requirements that have not been totally completed. This field value can help an advisor determine exactly what requirements a student needs to satisfy to graduate.

    6. **Key in PS#**

    7. **Click Process Request**

**As of Date:** The audit report accurately reflects all of the student data as of this date.
You may view Report Results by scrolling down the page. However, for a printed report you will click the Print button first and then click Report Manager where you will print the Audit report.

8. Click Print. Make sure your printer is setup on your user defaults. Report will print to your printer.
How to Read the Degree Progress Report

Remember that the Report consists of two parts, the Advising Transcript and the Academic Audit. We will look at each part separately on our sample Report.

**Advising Transcript**

Notice that the transcript is arranged in chronological order from the earliest enrollment period to the most recent. Each semester entry begins with a listing of the student’s Program and Plan (the ones in effect that semester).

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**Academic Program History**

Program: School of Education UG

2005-12-19: Active in Program

2005-12-19: Geography BS Major

You will also find the student’s Transfer Credit summary listed on the Advising Transcript.

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**Transfer Credits**

Transfer Credit from Lamar Univ - Beaumont

Applied Toward School of Education UG Program

Course Trans GPA: 0.000 Transfer Totals: 17.00 0.00 0.00

Transfer Credit from Houston, Univ of

Applied Toward School of Education UG Program

Course Trans GPA: 0.000 Transfer Totals: 40.00 9.00 0.00
If you want to know the actual date that transfer credit was taken at the sending institution, you will have to consult the student’s transfer record separately.

The final entry on the Advising Transcript is the listing of Undergraduate Career Totals showing the student’s total grade point average and credit hours earned at the University of Houston Clear Lake.

Undergraduate Career Totals

<table>
<thead>
<tr>
<th>CUM GPA</th>
<th>CUM TOTALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.667</td>
<td>76.00</td>
</tr>
<tr>
<td>72.00</td>
<td>261.000</td>
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</tbody>
</table>

Advising Audit

Remember that the Audit is arranged in order of Academic Structure. You will see Undergraduate requirements first, then school and major requirements. The system uses indentation to help you discriminate levels.

There are certain conventions that the program uses that are helpful to recognize as you begin to review the sample. First, any requirement that has not yet been met or completed will be displayed on the Audit in bold print. This is an easy “shortcut” to identifying areas that a student still needs to complete. Requirements that have been met will be displayed in plain text (un-bold print).
Look at the list of credit hours that appears at the end of the Audit. Notice that this list includes all the student’s credits that may be used toward degree requirements and gives a summary of the required/actual/needed number of credits. Notice also that, unlike the Advising Transcript, the Audit’s list of credits includes not only the current semester’s enrollment but also any future enrollment on the student’s record.
The Undergraduate Career requirements are next in the Audit. The career level requirements are applied to all UGRD students regardless of Program or Plan. These include GPA for graduation and upper level requirements.

The next section of the Audit will include Program and Plan requirements. In these areas you will find requirements for BS and BA degrees, school-specific requirements, as well as requirements for students’ specific majors and, where applicable, sub-plans. The core curriculum will fall under the Program Level requirements.
Naming Conventions and troubleshooting degree audits

A standard naming convention was generally used for the degree audits as they were being built. They are as follows:

1. `<Plan name or Rubric> LLFound CL XXXX`
2. `<Plan name or Rubric> PIReq RQ XXXX`
3. `<Plan name or Rubric> PIElec RG XXXX`

CL= Course List
RQ= Requirement
RG= Requirement Group

The ones that print on the audit reports are the RQ and RG numbers. When submitting requests for directives, substitutions, or to adjust a requirement, you will use the number that is used at the end of the text. This will be used to identify where the problem is for troubleshooting purposes. How to submit these requests are in the following section.
Student Exceptions

What is a Student Exception?
A student exception is the manipulation of a requirement or course for an individual student.
There are four primary types of student exceptions:

1. Course Substitution
2. Course Directive
3. Requirement Change
4. Requirement Waiver

The Course Substitution is a straight substitution of one course for another throughout the Advisement report. You only use a Course Substitution when you want a course to take the place of another course in every applicable requirement on the Advisement report.

The Course Directive allows you to either move a course into a specific requirement (“Substitute”) or move an existing course out of a specific requirement (“Exclude”). The exception is only applied to the specified requirement, not throughout the Advisement report.

The Requirement Change allows you to alter a requirement’s parameters – e.g., reduce the number of required credits in a requirement from 10 to 8.

The Requirement Waiver allows you to exempt a student from a requirement. This exception should not be confused with simply waiving a specified number of credits from a requirement, which would require a Requirement Change.

To submit a student exception, please use the Degree Progress Report Student Exception Form at www.uhcl.edu/records/....... (under construction)
Using Academic Advisement Reports for Advising and for Graduation Review

What-If Processes

The Degree Progress Report includes a powerful tool for advising students who are still deciding on their major or who are considering other majors. The “What-If” function allows you to run an Audit that puts the student’s academic record into a different major plan. We will show you how to run a “What-If” on a student’s major. We will also show you how to run a “Course What-If” that allows you to show a student how different courses might fit into a degree plan.

Producing a Quick What-If

Return to transcript Request Detail and click What-if Analysis
Click Quick What-If

1. Enter the data for the scenario you are simulating in this area.
2. Click OK.
3. Then you back at Request Detail Page and click Process Request.

2. Click OK
When you print the Simulated Audit you will see this Noted where the Academic Advisement Report begins.

- - - ACADEMIC ADVISEMENT REPORT - - -

Plan Simulation - Your Geography BS Plan was replaced by

Intrdisc Stdy BS Plan

6-12 Social Studies Subplan was replaced by

4-8 Generalist Subplan
Producing a Course What-If

1. Click Course List What-If

2. Key course subject you are considering substitute

3. Click Search

Note: there are several pages to this Course Search.
4. When you click search it takes you to the area so that you just click the course you are looking for. Just click the course you are looking for.

5. Then click OK
Academic Advising User Guide
University of Houston-Clear Lake
Office of Academic Records

3. Then you back at Request Detail Page and click Process.

When you print the Simulated Audit you will see this Noted where the Academic Advisement Report.
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Office of Academic Records

Student Records Basics

Updating Student Program/Plan

In PeopleSoft, a student is associated with a program(s) and plan(s) to indicate their academic objective. The program/plan in PeopleSoft is the equivalent to the student’s school, major, and degree. 

**Note:** You will only be able to run Audits for students who have the catalog year of 2004 or later. An actual change of Requirement Term can only be done by changing the student’s academic record in the Program/Plan area. The following steps will help guide you on updating a student’s program/plan stack in PeopleSoft.

Navigation: Records and Enrollment, Career and Program Information, Student Program/Plan

1. Enter the EMPLID of the student you are updating.

2. The Student’s Program/Plan page indicates the student’s current Program, Admit Term and Requirement Term.
3. The Requirement Term is used by the audit to determine the appropriate effective dated requirement groups, requirements and course lists to use when running the student’s audit. The student’s requirement term is Fall 2007. This means that the degree audit processor will select the appropriate effective dated rows for the student that begin on or before the start date of the term.

4. For entering a Plan or Program Change, you will click on the **+** to insert a row. The effective date will default to the current date. If you need a plan change to take effect that term, the effective date will need to be on or before the start of the term.

5. Enter the **Program Action** of PLNC (Plan Change).

6. Select an **Action Reason**. The following action reasons can be used:
   a. 2DPL: Deletion of 2nd Plan
   b. 2PLN: Addition of 2nd Plan
   c. SIPC: Student Initiated Plan Change

7. Admit Term and Requirement Term will default in from the first row.

8. Select the Student Plan Page
9. The student’s Academic Plan is used to indicate the major associated with this student. Each academic plan is linked to a **Requirement Term**. If you are changing a plan, you must overwrite the current plan, **DO NOT ADD A ROW**. If you are adding a second plan, you will enter a new row by clicking on the + and entering the new plan. **IMPORTANT:** When you are making a plan change, you must make sure that the Requirement Term listed here matches the one on the Student Program Page.

10. The Advisement Status of **Include** will include the student’s plan in the audit for the student. The Advisement status of **Not Include** will not include the associated plan with the audit.

11. Click the Previous Row ← or Next Row → buttons to view additional academic plan(s) for the student.

12. Select the Student Sub Plan Page.
13. The Academic Subplan and Requirement Term are associated with the student on this page. **Note: This student is not in a major with subplans so none appear on this page. Again, if you are changing the subplan, it must be overwritten.**

**IMPORTANT:** When you are making a plan change, you must make sure that the Requirement Term listed here matches the one on the Student Program and the Student Plan Page.

14. Click the Previous Row or Next Row buttons to view additional academic subplan(s) for the student.

**Program Changes**

Program changes work similar to plan changes except the Program Action of PRGC is used. When you insert a new row to do a Program Change, both the Admit Term and Requirement Term are blanked out. You must enter the terms in which you want the change to take effect. You must also ensure that the Plan Requirement Term and, if applicable, the Sub plan Requirement Term match the Requirement Term on the Program Page.
Elective Transfer Credit

The student record system assigns some transfer courses elective credit rather than a specific course equivalent. These credits will show up on the Advising Transcript as GENELEC-LL (for freshman and sophomore level credit) or GENELEC-UL (for junior or senior level credit). Because these credits are not equal to any specific course in the UHCL course inventory, the Audit cannot use them to fulfill specific academic requirements. If an upper level course that has been transferred can be used in a requirement, you will need to submit a “Student Exception Form” and submit it to the Coordinator for Degree Processing. Courses that need to be articulated either to a UHCL upper level course or a lower level course, will need to be identified using the “Request for Acceptance/Correction of Transfer Coursework” form and submitted to the Transcript Analysts in the Office of Admissions.

Core Curriculum Transfer Credit

Some courses will transfer in with UHCL equivalents that are not part of UHCL Core. If you see a transfer course that should be included in the Core because it was a Core class at the originating institution, these courses will need to be identified and designated. Requirement Designations have been utilized to identify these courses. You will need to submit your request to the Transcript Analysts using the “Request for Acceptance/Correction of Transfer Coursework” form. The Core Designation will placed on the course so that it falls into the correct degree requirement.

Expired UL Transfer Credit

Courses older than 7 years old will be coded as GENELE 7YRUL upon articulation. If the course becomes an approved course to be used for degree audit purposes, these courses will need to be identified on the “Request for Acceptance/Correction of Transfer Coursework” form and submitted to the Transcript Analysts for articulation.
Business Process Flow Diagram

Process Transfer Credit/Degree Progress Business Process Flow

Overtime Post Process runs to post transfer credit to Student’s Record[looked off with Term Activation]

Advisors Run Queries to Identify students who have enrolled for term

Advisor runs Transfer Credit Summary Report

Articulation Corrections, Core Designation Correction(s) needed?

Submit “Request for Acceptance/ Correction of Transfer Coursework” Form to Transcript Analysts

Analysis correct and repeat transfer credit/Copy of form is returned to Advisor

Advisors Run Degree Progress Report

Substitutions, Directives, Waiver(s) Required?

Yes

Advisor submits “Degree Progress Report Student Exception” Form to the Degree Progress Coordinator

Coordinator makes exceptions/Copy of form is returned to Advisors

No

Advisor monitors degree progress report

No