Advising Guide to the Academic Curriculum Change Tool & Softdocs

PROCEDURES

UNIVERSITY PROCESS IMPROVEMENT - CREATED 10/2018 OFFICE OF THE REGISTRAR - UPDATED 3/2024

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1.0 INTRO TO THE ACADEMIC CURRICULUM CHANGE TOOL (AKA "TOOL")

The University Process Improvement team with university vendor, Evisions developed an automated tool allowing authorized academic advisors to change the curriculum for many of their students which will be immediately reflected in Banner in 2018. This process removes the need for paper forms that must be walked to multiple campus offices before Registrar staff update Banner manually.

1.1 WHAT CAN THE TOOL CHANGE?

- 1.1.1 The Tool will allow advisors to change the following parts of a student's academic program in Banner.
 - Program
 - Major
 - Concentration
 - Minor
 - Catalog Term

1.2 ELIGIBLE POPULATIONS

1.2.1 Eligible students found in the tool are for undergraduate degree-seeking students. If the undergraduate degree-seeking student does not appear in the search results, an exclusion message will appear. See section 4 for full information on excluded populations.

1.3 INELIGIBLE POPULATIONS

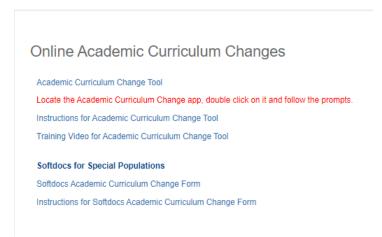
1.3.1 Due to different authorizations, requirements, and access, advisors will not be able to adjust programs through the Tool for certain groups of students. Changes for these populations must be done by using the SoftDocs links found in the Academic Curriculum Change portlet of the MyMemphis portal Advising page.

1.4 EFFECTIVE TERMS AND CATALOG TERMS

- 1.4.1 Start Dates The tool will display a future term in the dropdowns on the current term's first day of class.
 - For example, Summer/Fall 2024 terms will begin displaying on the first day of class for Spring 2024 (January 2024).
 - Summer/Fall terms will always display at the same time.
 - Spring 2025 will be displayed on the first day of Fall 2024 classes (August 2024)
- 1.4.2 End Dates The tool will stop displaying the current term after the last day to add/drop for the term
 - Technical note: SOBPTRM_START_DATE + 4 days

1.5 ACCESS TO CHANGE TOOL

- 1.5.1 Access will be granted to those who have been approved by their director of advising. Once a user has successfully attended the Tool training, or confirmation of training by their director of advising, the Registrar's Office will add the newly trained user to the **Argos-STU-AcadCurrChange-RV** LDAP group for access.
- 1.5.2 Authorized academic advisors will be able to access the tool via their MyMemphis Advising page.

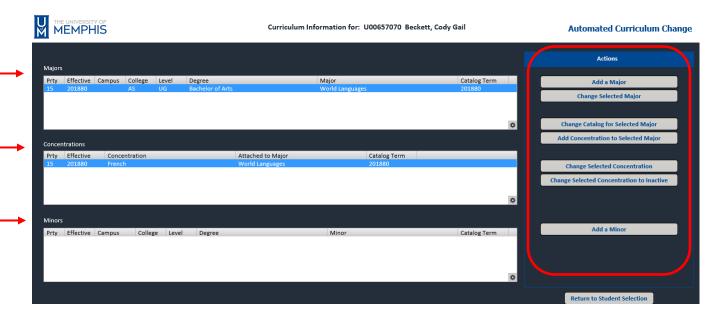


2.0 ANATOMY OF ACADEMIC CURRICULUM CHANGE TOOL

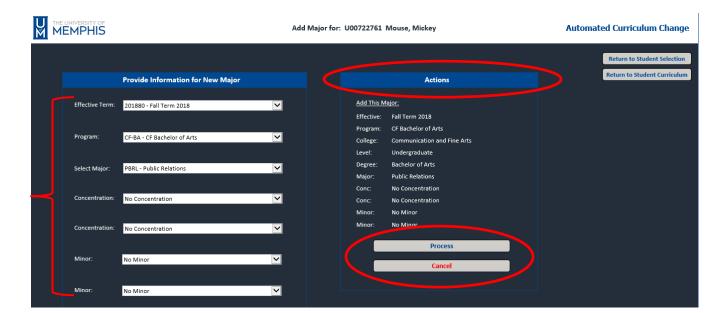
Search by Student ID or Student Name



Student Curriculum Information Dashboard & Action Bar



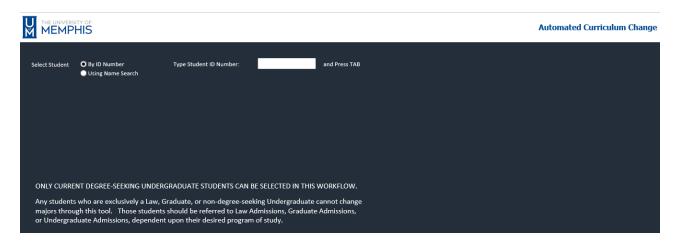
New Program Options and Actions Preview



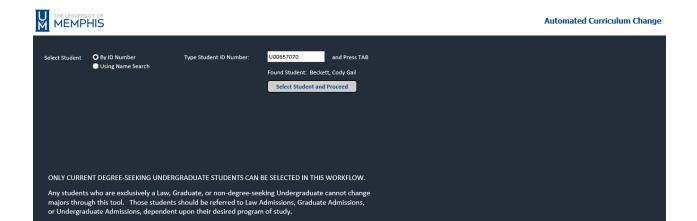
3.0 HOW DO I...?

3.1 SEARCH FOR A STUDENT

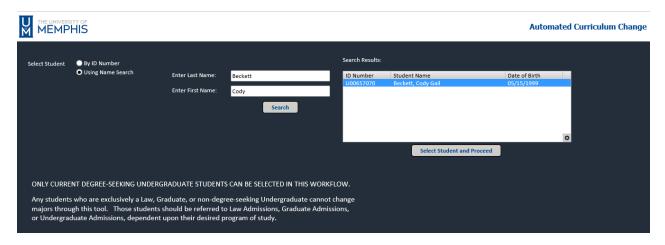
- Searching by ID Number (Banner ID)
 - o By default, the By ID Number radio button is selected
 - o Type the student's Banner ID into the Type Student ID Number field
 - Press the TAB key
 - A "Loading" circle will appear. If it does not, press the TAB key again
 Note: It is strongly recommended that you use the TAB key rather than Enter throughout this tool for better performance.



- The student's name will appear after Found Student
- o Hit TAB (A "Loading" circle will appear. If it does not, press TAB again)
- o Click on Select Student and Proceed to enter the student's dashboard



- Searching by Name (Less recommended method)
 - Select Using Name Search radio button
 - Type the student's last name into the Last Name field
 - o Click cursor into the **First Name** field. Type the student's first name
 - o Hit TAB (A loading circle will appear. If it does not, press TAB again)



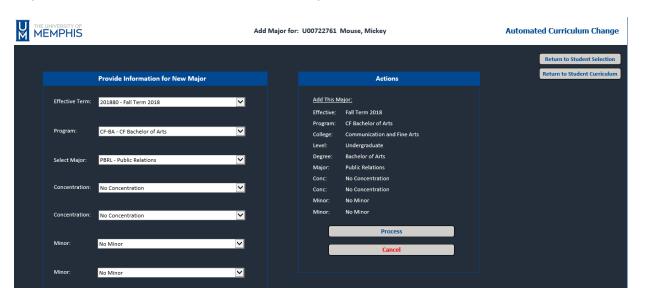
- o Student name should appear in the Search Results unless the student has been excluded from the Tool
- Click on Select Student and Proceed to enter the student's dashboard

TIP: Name searches take much longer to process than Banner ID. Use only when you cannot find Banner ID.

3.2 ADD A NEW PROGRAM (AND KEEP THE CURRENT PROGRAM)

- Enter student's Banner ID. Click Select Student and Proceed when correct student is displayed
- o In the Action Tool block on the right side of page, click Add a Major

 Select the appropriate value from each needed drop down. Effective Term, Program and Select Major are required. Concentration 1&2 and Minor 1&2 are optional



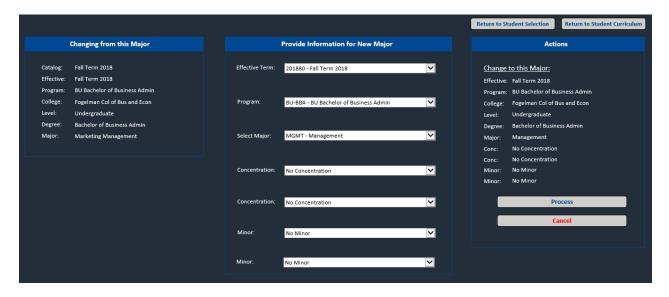
- Review the Action Preview block for accuracy
- If incorrect, click Cancel and you will be taken back to the student curriculum page where corrections can be made
- o If correct, click **Process**. Banner will immediately be updated to reflect the major changed thru the Tool

3.3 CHANGE AN EXISTING PROGRAM (INACTIVATE THE CURRENT PROGRAM)

- o Enter student's Banner ID. Click Select Student and Proceed when correct student is displayed
- o In the Actions block on the right side of page, click **Change Selected Major**

- Existing program information appears on the Changing from this Major box on the left
- Select the appropriate value from each needed drop down. Effective Term, Program and Select Major are required. Concentration 1&2 and Minor 1&2 are optional

Return to Student Selection



- o Review the Action Preview block for accuracy
- If incorrect, click Cancel and you will be taken back to the student curriculum page where corrections can be made
- o If correct, click **Process**. Banner will immediately be updated to reflect the major changed thru the tool

3.4 UPDATE CONCENTRATIONS

ADD CONCENTRATION TO EXISTING PROGRAM

- o Enter student's Banner ID. Click Select Student and Proceed when correct student is displayed
- Select the program where the concentration will be added
- o Click Add Concentration to Selected Major from the Action block



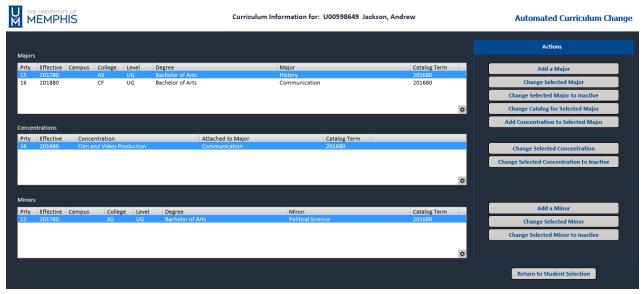
- Choose appropriate term in Effective Term dropdown
- Select new concentration from the dropdown



o Confirm choice in the Actions block (if not correct, click Cancel), Click Process



Dashboard will show the newly added concentration



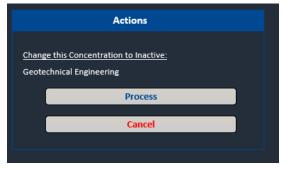
o Banner will be updated immediately with the new concentration

INACTIVATE CONCENTRATION

- Enter student's Banner ID. Click Select Student and Proceed when correct student is displayed
- Select the program that contains the concentration to be inactivated
- Click the Change Selected Concentration to Inactive button in the Actions block



- Select Effective Term from dropdown
- Review Actions Preview block



o If correct, click Select Student and Proceed. If not correct, click Cancel to return to student curriculum



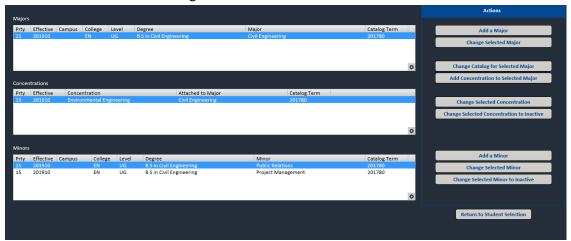
3.5 UPDATE MINORS

Unlike majors and concentrations, minors at the University of Memphis are not attached to a program. This means that students do not have to be earning a degree from the College of Arts & Sciences to earn a minor in English. Although this has its advantages, it makes updating programs difficult at times in Banner. When adjusting a program for a student with a minor, please make note of the minor if the student wants to keep the same minor. See last item in this section for further explanation.

ADDING A MINOR

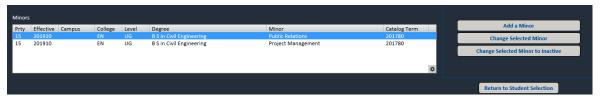
- o Enter student's Banner ID. Click Select Student and Proceed when correct student is displayed
- o Choose the Effective Term from dropdown

- Choose appropriate minor (up to two minors can be chosen in a single transaction)
- Review changes in the "Actions" box
- Click Process to make the change

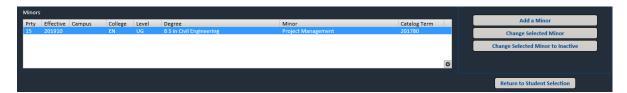


INACTIVATING MINOR

- o Enter student's Banner ID. Click Select Student and Proceed when correct student is displayed
- Select the minor that is to be inactivated



- Click Change Selected Minor to Inactive
- Review changes in the Actions preview box
- Click Process to make the change



RE-ADDING A MINOR AFTER ANY PROGRAM CHANGES

When attempting to inactivate a major where a minor has been attached thru the Tool, the advisor must first inactivate the minor. The advisor must know whether the student wishes to keep the minor on the remaining (or new) program. If the student wishes to keep the minor, then the advisor must add the minor back after updating other parts of the program.

 A yellow message will appear alerting advisor to inactivate minor first if the minor is tied to the program being updated



- Select the minor associated with the program that needs to be removed.
- Click Change Selected Minor to Inactive



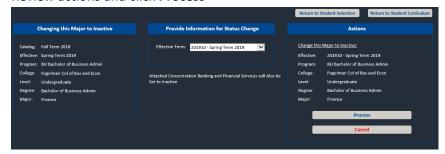
Review changes in the Actions preview and click Process



Note that the minor (attached to the BBA) has been removed. Advisor may now click on Change Selected
 Major to Inactive



Review actions and click Process



- Note that the BBA has now been removed
- o If the student wishes to keep the minor that was removed, add it back by selecting Add a Minor



- Review changes in the Actions preview block
- Click Process to make the change



3.5 UPDATE CATALOG TERM

- o Enter student's Banner ID. Click Select Student and Proceed when correct student is displayed
- Select the program where the concentration should be inactivated
- o Click the Change Catalog for Selected Major in the Actions box
- o Choose the next appropriate Effective Term
- Select the Catalog Term from the dropdown
- Review changes in the Actions preview block
- Click Process to make the change

TIP: Rules regarding catalog eligibility have not changed. Please ensure your changes fall within the existing quidelines.

4.0 TOOL EXCUSION PROCESSING - SOFTDOCS -ONLY POPULATIONS

4.1 STUDENT ATHLETES

- All Student Athletes must have their academic curriculum change request approved by an advisor in Center for Athletic Academic Services (CAAS). CAAS approval is required to ensure NCAA compliance with academic progress. Failure to do so could result in student becoming academically ineligible.
- o If a student's primary advisor is in CAAS, the CAAS Softdocs form must be initiated by a CAAS advisor
- For students in a declared academic program moving to another academic program, the new departmental advisor will initiate the <u>Student Athletes (for Primary Advisors only)</u> Softdocs found in the Academic Curriculum Change portlet of the MyMemphis Advising page. This form will route to CAAS for approval.
- Approved Softdocs requests will route to Registrar for Banner entry

4.2 CURRENT UM GLOBAL STUDENTS

Changes within UM Global program (UM Global to UM Global)

- Any student in a UofM Global program who desires to change anything in their academic curriculum but will remain in the UM Global program, must submit changes through Softdocs <u>UofM</u>
 Global to UofM Global form
- Once advisor submits the Softdocs n form, it will be routed to the Registrar's office where the change will be made in Banner
- Moving from UofM Global to On-Ground
 - If a student no longer wishes to be in the UM Global program, and desires to be in an on-ground program, the advisor of their newly chosen program must initiate the <u>UofM Global to On-Ground</u>
 Softdocs form
 - o The form will route to Student Health Services to review outstanding immunizations
 - After Health Services completes the Softdocs, International Programs will receive the Softdocs form to review for any citizenship or visa concerns
 - o Once reviewed, the approved form will route to the Registrar's Office for Banner entry

4.3 CHANGES ONLY MADE BY REGISTRAR

There are some student situations that prohibit an advisor from using the tool to make academic curriculum changes. For these situations, the advisor should initiate the <u>All Other Exceptions Softdocs</u> which will route to the Registrar's Office for Banner entry.

- Student has applied for graduation (SHADEGR record exists)
- Student is not currently enrolled
- o Request Changes to a Prior Effective Term
- o 5th Year Students 2MJR/Post Bacc
- Declaring Nursing as a major (College of Nursing only)

5.0 TOOL EXCLUSIONS - POPULATIONS REQUIRED TO CHANGE THRU ADMISSIONS

5.1 NON-DEGREE SEEKING STUDENTS

 Non-Degree Seeking students who want to become degree-seeking students must contact either <u>Undergraduate Admissions</u> or <u>Graduate Admissions</u> for instructions.

5.2 GRADUATE AND LAW STUDENTS

Visit the Graduate School or Law School for instructions for adjusting programs.

6.0 SYSTEM MESSAGES

6.1 EXCLUSION MESSAGES

For student populations excluded in Section 4.0, advisors will receive messages explaining that the student is not eligible to use the tool. Confirm that the correct Banner ID has been entered. Submit the appropriate Softdocs form.

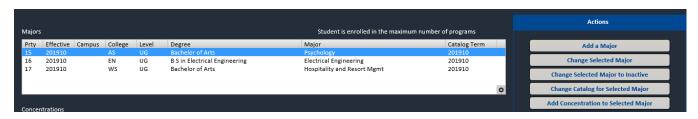


6.2 MAXIMUM PROGRAM MESSAGES

Students are limited to the number of programs, majors, concentrations, and minors they can earn. When a student has approached these limits, advisor will receive a message.

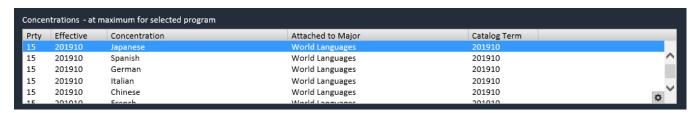
Maximum number of programs - 3

Message: Student is enrolled in the maximum number of programs



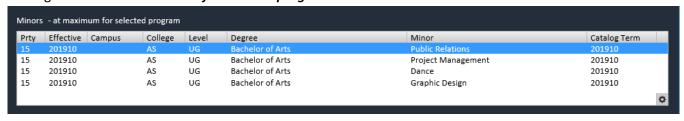
Maximum number of concentrations within a program - 6

Message: Concentrations – at maximum for selected program



Maximum number of minors - 4

Message: Minors - at maximum for selected program



TIP: World Languages and Individual Studies will be most affected by this. Keep in mind that this is not a new rule, and it will be enforced programmatically.