Deferring Admission to a Future Term after Matriculation

This guide will cover:

- The process of deferring admissions to a future term after matriculation for student who has registration (p. 1-4)
- The process of deferring admissions to a future term after matriculation for a student who doesn’t have registration and term activation has been deleted (p. 5-8).

IF STUDENT HAS REGISTRATION

Step One

Prior to Deferring Admission University Staff will need to do either of the following.

If student is registered drop student from all classes for the term they will not be attending.

OR

If no registration has occurred or transfer credits have not been posted delete term activation for the term they will not be attending

Step Two

Navigate to the Student Records page by using the following breadcrumb:

Step Three

On the search criteria page, enter search criteria for the student whom you want to review their information.

Be sure to have the “Include History” checkbox selected when entering the Student Program/Plan component. You may need to see the historical entries on the student’s CPP stack in order to make correct business decisions.

Click Search
Step Four

If the student only has one CPP Stack: The system will take you directly into the student’s active record if the student has only one CPP stack.

If the student has multiple CPP stacks: review the existing stacks on your student to determine which Student Career Number to modify then select your intended stack.

Step Five

On the Student Program tab, click on the (+) sign to add a new record.

Click in the Effective Date field and enter the effective date of the change. Use the following methodology to determine what effective date to use:

- If you are updating an existing program plan stack and the program/plan change will occur for the following term then use the day after the current term ends as the effective date of the program/plan change row with the following term as the admit term.
If you are updating an existing program plan stack and the program/plan change will occur for the current term and the request is submitted before the census date then use the first day of the current term as the effective date of the program/plan change row with the current term as the admit term.

If you are updating an existing program plan stack and the program/plan change would like to occur for the current term and the request is submitted after the census date then use the day after the current term ends as the effective date of the program/plan change row with the following term as the admit term.

**Step Six**

Click on the Program Action magnifying glass and select **DATA - Data Change**.

**Step Seven**

Click the magnifying glass next to **Admit Term** and select the deferred admit term.

Notice that the requirement term field will automatically populate and match the Admit Term.

**Step Eight**

Click on the **Student Plan tab** to add the Academic Plan information.

Click on the magnifying glass next to **Academic Plan** to select the desired academic plan from the list of available values. If more than 300 rows are returned use the Academic Plan search parameters to reduce the number of rows returned.
Things to Keep in Mind:

The Requirement Term should default to the requirement term value from the Student Program tab. If it does not click on the Requirement Term magnifying glass and select the requirement term.

If a student had multiple academic plans prior to the plan change row and only one of the plans needs to be changed please make sure to reattach the other academic plan to new effective dated row click on the plus sign (+) to add a new row.

Step Nine: Follow step if there is an Academic Sub-Plan. If not, skip to step ten.

Click on the Student Sub-Plan tab. If multiple Academic Plans exist use the left and right arrows to find the Academic Plan needing an Academic Sub-Plan change.

Click on the magnifying glass next to Academic Sub-Plan to select from the list of available values. Then click on the magnifying glass for Requirement Term and select the same Requirement term entered on the Academic Plan Tab.

***Remember not all academic plans have sub-plans

Step Ten

Click Save.
IF STUDENT HAS NO REGISTRATION & TERM ACTIVATION HAS BEEN DELETED

Step One

Navigate to the Student Program/Plan page by using the following breadcrumb:

[Image of breadcrumb path]

Step Two

On the search criteria page, enter search criteria for the student whom you want to review their information.

Be sure to have the “Include History” checkbox selected when entering the Student Program/Plan component. You may need to see the historical entries on the student’s CPP stack in order to make correct business decisions.

Click Search
**Step Three**

If the student only has one CPP Stack: The system will take you directly into the student’s active record if the student has only one CPP stack.

If the student has multiple CPP stacks: review the existing stacks on your student to determine which Student Career Number to modify then select your intended stack.

**Step Four**

On the Student Program tab, click on the (+) sign to add a new record.

**Click in the Effective Date field and enter the effective date of the change.** Use the following methodology to determine what effective date to use:

- If the student did not register for the original admit term and the term activation for the original term has been deleted use today's date as the effective date.
Step Five

Click on the Program Action magnifying glass and select ADRV - Admissions Revocation.

Then click on the Action Reason magnifying glass and select the appropriate value.

Step Six

Click on the Student Plan tab to add the Academic Plan information. The original academic plan associated with the program plan stack may have been removed.

Click on the magnifying glass next to Academic Plan to select the desired academic plan from the list of available values. If more than 300 rows are returned use the Academic Plan search parameters to reduce the number of rows returned.

Things to Keep in Mind:

The Requirement Term should default to the requirement term value from the Student Program tab. If it does not click on the Requirement Term magnifying glass and select the requirement term.

If a student had multiple academic plans prior to the plan change row and only one of the plans needs to be changed please make sure to reattach the other academic plan to new effective dated row click on the plus sign (+) to add a new row.
Step Seven: Follow step if there is an Academic Sub-Plan. If not, skip to step eight.

Click on the **Student Sub-Plan tab**. If multiple Academic Plans exist use the left and right arrows to find the Academic Plan needing an Academic Sub-Plan change.

Click on the magnifying glass next to Academic Sub-Plan to select from the list of available values. Then click on the magnifying glass for Requirement Term and select the same Requirement term entered on the Academic Plan Tab.

***Remember not all academic plans have sub-plans***

![Image of Catalyst interface showing student sub-plan details]

Step Eight

Click **Save**.