Processing Plan Changes within the Same College

This guide will cover:

- How to modify an existing Academic Program/Plan stack (CPP Stack).

**Step One**

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

**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**

![Search Criteria Form](image)

**NOTE:** The ID field is referring to the Catalyst ID while the Campus ID is referring to the M#.
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 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 Five**

Click on the Program Action magnifying glass and select PLNC - Plan Change. Then click on the Action Reason magnifying glass and select PLAN - Plan Change.

**Step Six**

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

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

**Step Seven**

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.
**Step Eight:** Follow step if there is an Academic Sub-Plan. If not, skip to step nine.

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 Nine**

Click **Save**.