Procedures on How to Update a Students Major/Plan in PeopleSoft

Our goal is to document the procedures for changing a students major/plan in PeopleSoft.

This training documentation will ensure data integrity, improve our methods in Federal and State reporting, as well as, meeting Financial Aid eligibility requirements, the update of a valid student major/plan is a critical requirement. Due to this requirement, all students will be prompted to complete the registration survey when they log on to their Passport account. A&R staff is encouraged to please direct/assist the student to complete the survey. In an instance that the student requires assistance at the counter, it is vital that you verify the student has a valid major/plan (other than an IM major) and update the major with the completion of the Record Correction Form if required.

The step by step tutorial provides easy to follow instructions on how to access the Program/Plan page in PeopleSoft. This documentation will also ensure that there is consistency in how the A&R staff updates a student's major/plan.

To use the full functionality of our systems, we must maintain the integrity of our database. With users from many departments entering data, we want to minimize the entry of duplicate or multiple records.

Academic Year 2014
INSTRUCTIONS FOR UPDATING A MAJOR/PLAN

Step 1: Navigate to Records & Enrollment > Career & Program Information > Student Program/Plan.

Step 2: Enter the student’s ID number and check the box next to “Correct History”

Step 3: Click the “Search” button

Step 4: If applicable, choose the most current active career number (if not applicable skip to Step 5)
Step 5: Click the plus sign \( + \) to insert a new row.

Step 6: Complete the following fields:

- **Effective Date** = The date of the program and/or plan change
- **Program Action** = Program Change (this will update the student's home campus if applicable)
- **Action Reason** = Leave blank
- **Academic Program** = Select one of the NEW programs listed based on the campus (DO NOT use EXMPT, MATR, or SPX. We will no longer be using these). The new programs are now campus specific. So when you update the program it will automatically update the campus if you are changing their campus.
- **Admit Term** = Input the previous admit term NOT the current term

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Step 7: Click on the Student Plan Tab (the *Academic Plan is now blank).

Step 8: Click on the magnifying glass next to the *Academic Plan field. A list of majors/plans for the campus are the only available options. All of the old majors/plans will stay in the list, BUT YOU MUST choose a new major/plan that has an alpha character at the end (i.e. “M”, “E”, or “S”).

Step 9: Verify that the Academic Plan has a description next to the code. If this is blank it is invalid and you must choose another major/plan.

Step 10: Click the “Save” button.

This completes the “Instructions for Updating a Major/Plan”.

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