

SIS Training & Operations Manual

Graduate School Staff

NC State University: *Revised November 1, 2017*

THE GRADUATE SCHOOL	6
Graduate Student Records Staff	6
Adding Good Faith (Positive Service Indicator) for Residency Purposes	6
Graduate Student Advising	8
Viewing Graduate Student Patent Agreements	8
Processing Graduate Student Advisory Committees and Plans of Work	11
Updating the Student's Checklist to Indicate Approval of the Plan of Work and Committee	15
Query To Generate List of Graduate Faculty Members	17
Updating Graduate Student Plans of Work and Advisory Committees	18
Advisory Committee External/Technical Consultant Appointments	18
Graduate Faculty Members Programs	20
Advisory Committee Inter-Institutional Member Appointments	20
Advisory Committee Replacement or Substitution of a Member	21
Updating Advisory Committee For Addition of Graduate School Representative	23
Query for Graduate School Representatives	25
Changing, Removing Or Adding A Course On the Plan of Work	25
Adding/Deleting a Course On An Approved Plan of Work	28
Approving Plans of Work and Committees Modified By The Graduate School (Recycling)	30
Move or Delete Plan Of Work	31
Query to Determine When Residence	33
Credit Requirement Met for a Doctoral Student	33
Inquiring on Graduate Faculty Instructor Advisor Records	33
Processing Patent Agreements and Patent Agreement Acknowledgements (Non Thesis)	35
Processing Requests for Transfer Credit	37
Previous Masters Flag	37
Creating Plan of Work Templates	40
Graduate Faculty Records Maintenance	41
Review and Approval of Graduate Faculty Nomination	42
Updating Graduate Faculty Status In the HR/SIS System	43
Adding Minor-Only Plans	47
Queries for Graduate Faculty Status	47
List of Queries	47
Removing Records From the Instructor/Advisor Table	47
Removing Graduate Faculty Status	48

Graduate Student Records and Enrollment	48
Graduate Student Checklist and Milestone Record Maintenance.....	48
Master Option B Graduation Checkout	48
Processing Master Request to Schedule Final Oral Exam 1 ST Attempt (Defense)	53
Processing Master Request to Schedule Final Oral Exam 2 nd Attempt (Defense)	56
Processing a Master Final Oral Exam Report.....	59
Masters Unconditional Pass First Attempt.....	59
Masters Conditional Pass First Attempt.....	63
Masters Failure First Attempt	65
Masters Unconditional Pass Second Attempt	68
Masters Failure Second Attempt	71
Processing a Request to Schedule Doctoral Oral Preliminary or Final Exam 1 ST Attempt (Defense)	75
Processing a Request to Schedule Doctoral Oral Preliminary or Final Exam 2 nd Attempt (Defense)	78
Processing a Doctoral Prelim or Final Oral Exam Report.....	82
Doctoral Unconditional Pass First Attempt	82
Doctoral Conditional Pass First Attempt	85
Doctoral Failure First Attempt (Prelim or Final).....	88
Doctoral Unconditional Pass Second Attempt (Prelim or Final).....	91
Doctoral Failure Second Attempt	96
Satisfying Masters or Doctoral Final Exam Conditions.....	100
Processing Doctoral Admission to Candidacy.....	101
Processing Required Doctoral Forms and Fee	103
Inserting New Checklist Items	103
Update Existing Checklist Items.....	105
Graduate Student Program / Plan Record Maintenance	105
Admissions Actions on the Student Records Tile Program / Plan Stack.....	105
Academic Plan and Program, Plan and/or Sub-Plan Changes For Matriculated Applicants	106
Discontinuation of Program (Matriculated Students Who Will Not Enter)	108
Newly Matriculated Students Being Denied Admission AFTER Previous Admit Action	110
Admitted Applicant Deferral to a Future Term	112
Admitted Applicant Who Was Previously NDS Deferral to a Future Term	115
Re-Matriculation of Applicants Previously Discontinued.....	116
Matriculated Student Being Admitted to an Earlier Term	117

Students Admitted After the Beginning Of the Term	120
Change in Admission Status From Full to Provisional or Vice Versa After Matriculation	120
Actions On the Student Records Tile Program / Plan Stack for Active Students	121
Activate, Plan Change, and Program Change Actions	121
Query for Students With Program and Plan Changes	121
Student Going on for Advanced Degree (MR-PhD).....	122
Second Master Degree (International)	124
Processing a Program and/or Plan Change (GCDI or GCDD) (Curriculum or Degree Changes) for an International or Domestic Student	126
Lateral Transfer	137
Minor Plans.....	141
Co-Majors	142
Dual Degrees.....	144
Transfers.....	146
Doctoral Students Pursuing ‘En Route’ Master	148
Updating And Adding Student Milestones For Changes To the Student Program and Plan	150
Manually Updating Existing Program Milestone Records For Academic Plan Changes, Master “en route” and Advanced Degrees In the Same Program.....	151
Adding New Milestones Individually	151
Manually Adding A New Checklist For Academic Plan Changes, Master “en route” and Advanced Degrees In the Same Program.....	154
Discontinuation, Dismissal, Leave, Matriculation, and Withdrawal Actions	155
Terminate Without Prejudice.....	155
Termination of Program	157
Program Termination for Non-Compliance With Continuous Registration Requirement	159
Reinstatement	160
Leave of Absence and Return From Leave	161
Retro-Active Leave of Absence	163
Thesis and Dissertation Record Management	164
Thesis and Dissertation Review.....	164
Thesis and Dissertation Acceptance	166
Graduation Clearance	169
Graduation Queries.....	169

List of Queries	169
Graduate Commencement Bulletin	171
Graduation Checkout (Processing Graduation Applications)	171
Applying to Graduate FOR a Student	172
Keying in Graduation Attendance	174
Find an Existing Value – Used to see what is current and if a change needs to be made.....	174
Keying in Name Pronunciation.....	177
Keying in Sponsor Relationship.....	178
Graduate Certificates	180
Enrolling Students in Graduate Certificate Academic Plans	180
Query for List of Students in a Minor or Certificate.....	183
Awarding Graduate Certificates	183
Student Comments	184
Adding Comments.....	184
<i>GS – Graduate School Comment</i>	184
Viewing Comments	186
Graduate Student Support Plan and Graduate Appointments.....	189
Enrollment Request Search.....	189
Graduate Admissions	190
Duplicate ID Resolution.....	191
Graduate Records Supervision.....	191
Converting Student Records Tile From Legacy History	191
Academic Structure Actions.....	192
Graduate Deans	193
SIS Security Administration	193
New directors of graduate program and new Graduate Services Coordinators.....	194
Graduate Student Support Plan	194
(GSSP) Data.....	194
Graduate Student Support Plan	197
(GSSP) Service Indicators	197
Graduate Student Support Plan	199
(GSSP) Health Insurance Eligibility	199
Graduate Student Support Plan	200
(GSSP) View Bill.....	200
Appendix	203

Advisory Committee Member Types	203
Checklists.....	204
Expanded Graduate Career Terminology.....	204
Graduate Plan of Work and Advisory Committee Workflow	205
Graduate Advisory Committee Invitation	205
Graduate Student Plan of Work – Work Flow Status.....	205
Graduate Student Record Program Actions and Action Reasons	206
How to Use the SIS EXCEL Download Feature	207
Milestones	207
Reporting - Queries	208
Instructions for Running a Query.....	208
List of Queries	210
Recent Changes to SIS Manual	240

THE GRADUATE SCHOOL

Overview This section covers work performed in the Graduate School.

Objectives Procedures for maintaining Student Records Tile in SIS are covered in this section.

Graduate Student Records Staff

Objectives The Graduate Student Records Tile staff consists of Graduate Records Officers and Graduate Records Supervisors. All Graduate School College Liaisons are assigned as Graduate Records Officers. Others in the Graduate School are provisioned with this security role as well. This includes the Director of Graduate Admissions and Records, the Assistant Dean for Operations and Fiscal Affairs, the Manager of Student Financial Services, the Electronic Thesis & Dissertation (ETD) Editor and Graduation Coordinator, the Manager of Graduate Appointments and the International Admissions Specialist. Graduate Records Supervisors include the Assistant Dean for Operations and Fiscal Affairs, the Director of Graduate Admissions and Records, the International Admissions Specialist and the Manager of Graduate Appointments. Graduate Records Supervisors may *Correct History*.

The graduate Student Records Tile staff is responsible for the maintenance of official university records of graduate student career and program information and more specifically, student program/plan records. They are also responsible for maintenance of graduate student milestones, checklists, college-level graduation application processing and, in conjunction with students, Directors of Graduate Programs and Graduate Services Coordinators, for the processing and maintenance of graduate student Plans of Work and advisory committees. In addition they maintain official university records of the graduate faculty. All Student Records Tile responsibilities are carried out under the oversight of and in conjunction and coordination with the University Registrar and the Office of Registration and Records.

Reminder Graduate Records Officers have direct access to update pages and records that reflect directly on the student official and/or unofficial transcript.

Adding Good Faith (Positive Service Indicator) for Residency Purposes

Navigation Student Information System Homepage > Student Profile Tile > Manage Service Indicators

Search by EmplID:

Favorites | **Main Menu** > **Student Information Systems** > **Campus Community** > **Service Indicators** > **Person** > **Manage S**

Manage Service Indicators

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:

Unity ID:

National ID:

Last Name:

First Name:

Add a new service indicator:

Manage Service Indicators

Display: Effect **Institution:** [Refresh](#)

[+ Add Service Indicator](#)

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
DNC	Do Not Cancel Enrollment	Deferred to Final Cancellation	NCSU1	2138	Fall '13			08/01/2013	

[+ Add Service Indicator](#)

Enter the Service Indicator Code and Service Indicator Reason Code as "RES". Enter the Start Term and End Term (will be same).

Add Service Indicator

***Institution:** NC State University

***Service Indicator Code:** Good Faith Residency Applicatn

***Service Ind Reason Code:** Good Faith Residency Applicatn

Description:

Effect:

Effective Period

Start Term: Fall '14 **End Term:** Fall '14

Start Date: **End Date:**

Assignment Details

Graduate Student Advising

Objectives

Graduate student advising covers Plans of Work and advisory committees along with checklists maintained to track the status of important administrative tasks related to these advisory processes.

Reminder

Graduate Records Officers have direct access to update pages and records that reflect directly on the student official and/or unofficial transcript.

Viewing Graduate Student Patent Agreements

Objectives

This section describes the process of viewing Patent Agreements submitted by students through self-service.

Navigation

Student Information System Homepage > Advising Tile > Graduate Plan of Work.

Tab Name

Patent Agreement

Admin Graduate Plan of Work

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:

Academic Career:

Academic Program:

Academic Plan:

Effective Term:

First Name:

Last Name:

Search Results

Select the student to view

View All First 1 of 1 Last

Empl ID	Academic Career	Academic Program	Academic Plan	Effective Term	First Name	Last Name	Display Name
	Graduate	MED	13MEDMS	2108			

Note: A yellow callout box labeled "Search for student record by ID number or name" points to the Empl ID field. A yellow callout box labeled "Select the student to view" points to the first row of the search results table.

The search lands on the Graduate Plan of Work page.

Plan of Work | Committee | PoW Comments | Patent Agreement

Student Id [REDACTED] **Complete degree before** Fall '16 [Change](#)
Program MED Mathematics Education **Total Units Planned** 45.00
Plan 13MEDMS Mathematics Education-MS **Plan of Work GPA** 4.000
Status Approved
Date First Submitted 02/13/2012 **PoW Comments**

This plan of work and advisory committee have been approved (2-24-2012). Contact your academic department if you need to modify the plan.

Requirements		Find	First	1-11 of 11	Last	
Type	Requirement/Course Description	Class	Units	Term	Enrolled	Grade
Major	Transfer Credit	Select TR 999	9.0			
Major	Exp Stat Bio Sec I	Select ST 511	3.0		Fall '10	A
Major	Analy Second Teach	Select MA 507	3.0		Fall '10	A+
Major	Tch&Lrn Alge Think	Select EMS 513	3.0		Fall '10	A+
Major	Teach Ele Mid Math	Select EMS 512	3.0		Spring '11	A
Major	Appl Nonpar Stat	Select ST 505	3.0		Spring '11	A
Major	Teach and Learn Stats Thinking	Select EMS 519	3.0		Spring '11	A
Major	Geometric Thinking	Select EMS 514	3.0		Fall '11	A
Major	Exp Stat Bio Sc II	Select ST 512	3.0		Fall '11	A
Major	MR Thesis Research	Select EMS 695	9.0		Spring '12	
Other	Geom Second Teach	Select MA 508	3.0		Fall '11	A+

[Save](#) [Reset](#)

To view the Patent Agreement, select the “Patent Agreement” Tab. On the “Patent Agreement” Tab, you will see if the student has “submitted” either the electronic Patent Agreement or submitted the paper patent agreement. If a paper form was submitted, it will be stated on the agreement line along with the date and time of acceptance.

Paper Patent Agreement on file

Plan of Work | **Committee** | **PoW Comments** | **Patent Agreement**

North Carolina State University
The Graduate School - Patent Agreement

Name: [REDACTED]
Student Id: [REDACTED]
Agreement Type: MR

☒ I Agree 06/22/10 12:00AM Paper Form-On File

Electronic Patent Agreement on file

Plan of Work	Committee	PoW Comments	Patent Agreement
--------------	-----------	--------------	-------------------------

North Carolina State University The Graduate School - Patent Agreement

I have read and I understand the [Patent Procedures of North Carolina State University](#). I also understand that compliance with the Patent Procedures is a condition of my being a graduate student at North Carolina State University.

I, therefore, agree to abide by the Patent Procedures, including any amendments which may be adopted from time to time.

I acknowledge my obligation to communicate promptly to the University Office of Technology Transfer a full and complete disclosure of all inventions. Further, I will assign, and hereby do assign, to the University my right title and interest in all inventions that I conceive or reduce to practice during the course of my employment or in connection with my use of university facilities or funds administered by the University.

In the event that the University determines, in its sole discretion, to pursue patent or other intellectual property protection, I agree to execute any assignments or other documents necessary to comply with the terms of the Patent Procedures, and to cooperate in the preparation of patent applications and other documents necessary in prosecution of the patent. I also understand that University's funding agreements with third parties, including the United State Government, impose certain obligations with respect to rights in inventions and, when requested to do so by University, I will execute assignment or other documents necessary to comply with the terms of the funding agreements.

I understand that, unless otherwise specifically agreed in writing, I am entitled to a percentage of royalties received by University from the commercialization of my inventions, as set forth in the [Royalty Sharing Regulation](#) of North Carolina State University, as may be amended from time to time.

I do not have any employment, consulting or other agreement with any third party which grants rights that are in conflict with this agreement, and I agree that I will not knowingly enter any such agreement.

Name: [REDACTED]

Student Id: [REDACTED]

Agreement Type: MR

By selecting the 'I Agree' checkbox, I hereby agree to abide by the patent policies of North Carolina State University.

☒ **I Agree** 04/20/12 12:08PM [REDACTED]

Once the patent agreement has been submitted, the students' checklist items will automatically be updated. Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management - Person

Checklist Management 1 Checklist Management 2

ID: [Redacted]

Checklist Date Time: 02/06/2009 10:04:37AM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 02/06/2009

Checklist Code: Doctoral Checklist Due Date: 02/07/2009

*Sequence	*Item	Description:	*Status	*Status Date	*Due Date
100	GTRANS	Graduate Transcript	Received	01/10/2008	01/10/2008
Responsible ID: 000004290 Name: Digh, Kimberly Shipp					
200	GPATEN	Patent Agreement	Received	07/06/2011	02/07/2009
Responsible ID: 000004290 Name: Digh, Kimberly Shipp					

Processing Graduate Student Advisory Committees and Plans of Work

Objectives

Routine processing of Plans of Work and advisory committees is performed using the Worklist Tile.

Reminder

Graduate Records Officers have direct access to update pages and records that reflect directly on the student official and/or unofficial transcript.

Navigation

Student Information System Homepage > Worklist Tile > Worklist

Page

Worklist

Worklist for [Redacted]

Detail View Work List Filters: [Dropdown] Feed

From	Date From	Work Item	Worked By Activity	Priority	Link	
Drinda Elaine Bengé	03/27/2012	DGP Approval	DGP Approval	[Dropdown]	[Redacted]	Mark Worked Reassign
Paola Szajn	03/30/2012	DGP Approval	DGP Approval	[Dropdown]	[Redacted]	Mark Worked Reassign
Drinda Elaine Bengé	04/10/2012	DGP Approval	DGP Approval	[Dropdown]	[Redacted]	Mark Worked Reassign

Customize | First | View All | Last | 1-25 of 70 | Last

Click the student ID/Name Link

Step 1 Access your Worklist. Plans of Work requiring your attention will be listed.

Step 2 Access a graduate student's plan of work and committee from the Worklist Tile by clicking the link with the student ID number and name.

Tab Name Plan of Work Tab

Plan of Work | Committee | PoW Comments | Patent Agreement

Student Id [Redacted] Complete degree before Sum1 '17 **1**
 Program MAT Teaching **2**
 Plan 13MATMA Teaching-MA **2**
 Status Pending **4**
 Date First Submitted 03/09/2012 **3**

Total Units Planned 33.00
 Plan of Work GPA 3.750

PoW Comments
 GSR
 Comments

The plan of work and advisory committee have been submitted for approval. They are awaiting DGP Approval in the approval process

Type	Requirement/Course Description	Class	Units	Term	Enrolled	Grade
Major 5	Inquiry and Professional Devel 6	ED 571 7	1.0 8	Sum1 '11 9	A 10	11
Major	Org Bhr Mgt Incl C	ECI 579	3.0	Sum2 '11	B+	
Major	Div in Class Comm	ED 508	3.0	Sum2 '11	A-	
Major	Meth & Mat in LD	ECI 571	3.0	Fall '11	A	
Major	Sem SP ED Literacy	ECI 681	3.0	Fall '11	S	
Major	Prin Dev Assmnt	ED 507	2.0	Fall '11	A	
Major	Classrm Action Res	ED 570	1.0	Spring '12		
Major	Tch Func Life Skills	ECI 576	3.0	Spring '12		
Major	Meth Mats Beh Dis	ECI 584	3.0	Spring '12		
Major	Teacher Leadership	ED 572	1.0	Spring '12		
Major	Teachng Intern MAT	ED 569	4.0	Spring '12		
Major	Read Content Areas	ECI 541	3.0	Sum1 '12		
Major	Learning Disab	ECI 570	3.0	Sum1 '12		

Approve | Return to Student for Update

1. Review the degree completion time limit
2. Review the Academic Program and Plan
3. Review messages, if any

Note: If multiple majors exist, red stars will appear next to courses that are listed on both Plans of Work.

4. Review plan status. Status is displayed in two places. A pending status indicates that there is work to be done to process the plan, and the status message will contain further detail to explain the location of plan in the process and the work to be performed.
5. Course type may include Co-Major, Co-Minor, Major, Minor and Other.

By default, courses are ordered by type and term. You may reorder them to suit your needs by clicking on any column heading.

6. The Requirement column provides information about requested course transfer credit or lump sum credit from a previous graduate degree, at NC State or external schools. It may also list the course title, as it is listed on the schedule
7. The Class comes from the course catalog or the student's transcript. In the case of requested course transfer credit or lump sum credit from a previous graduate degree, at NC State or external schools, the class will display as TR999.
8. Units come from the course catalog, the student transcript or are entered when the plan of work is created in the case of variable credit courses from the catalog, requested course transfer credit or lump sum credit from a previous graduate degree, at NC State or external schools.
9. Term is pulled from the student's transcript or is entered as a future term, when the plan of work is created.
10. Enrolled represents the term of enrollment.
11. Grade is pulled from the student transcript when the specified course is actually graded. *As student's progress through the graduate career, their transcript updates the matched courses on their plan of work regardless of the term in which the course is taken.*

Note: The word "Comment" with a bubble icon will appear under the total units, if there is a comment under the "Comments" tab.

Tab Name

Committee

Type	Outside Rep	Member Name	Program Represented	Grad Faculty Status	Accept	Approve GPoW	GSR Indicator
1 Chair	<input type="checkbox"/>	Drinda Bengue	Teaching	Associate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 1

Review the student's Co-Major Program, Minor Plan and/or Co-Minor Plan if applicable. These are entered by the user creating the committee. Students, Directors of Graduate Programs, Graduate Services Coordinators or Graduate Records Officers in the Graduate School can enter or update committees. If the Co-Major Program, Minor Plan and/or Co-Minor Plan are approved by the Graduate School, these must be entered on the Student Program/Plan. Procedures for maintenance of the Student Program/Plan are covered in the **Graduate Student Records Tile and Enrollment** section of this document.

Step 2

Review the members of the committee.

- a) Accept – A check mark here indicates that the committee member has accepted the invitation to serve. Acceptance of the invitation can be marked by the committee

member them self, the Directors of Graduate Program, Graduate Services Coordinators or Graduate Records Officers in the Graduate School.

- b) Approve GPoW – A check mark here indicates that the committee member has approved the plan of work. Approval for a given committee member can be marked by the committee member them self, the Director of the Graduate Program, Graduate Services Coordinators or Graduate Records Officers in the Graduate School. A committee member may accept the invitation to serve but postpone that approval of the committee.


Tab Name

GPoW Comments

Step 1


Review existing comments. Comments are displayed in the order created. Each comment indicates the name of the user who created it, the comment type and the date it was created. Comments may be added by students, committee members, Graduate Services Coordinators, Directors of Graduate Programs and Graduate Records Officers.

Step 2

Add comments as necessary. You may delete comments you have added, by clicking the  button. Comments may be marked to hide from students, if you check the box

☐ Hide from Student

Step 3

Save your comments by clicking .

Tab Name

Return to the Plan of Work tab to complete your review.

Step 1

There are three review buttons. Click the appropriate button at the bottom of the Plan of Work tab.

- a) Approve – The plan is **approved**. A message is displayed indicating that the student must contact their academic department if they wish to make changes.
- b) Return to Student for Update – This marks the plan of work with a status of **denied**. A message is displayed indicating to the student that they should check the comments section or contact their academic department for details. You will need to be sure to put a comment listing the reason for the denial. In this status the Student, Graduate School, the Director of the Graduate Program and the Graduate Services Coordinator may all access the plan of work to make updates.

Note: Help link available – “This marks the PoW as DENIED”

- c) Back to DGP – This sets the plan of work to a **pending** status awaiting DGP approval. The plan of work will be returned to the DGP Worklist Tile for updates. You will need to be sure to put a comment listing the reason for return.

Updating the Student’s Checklist to Indicate Approval of the Plan of Work and Committee

Objectives

The student’s checklist keeps track of administrative tasks that must be completed by the student or on the student’s behalf. The items on the checklist and the checklist itself must be marked completed or waived in order for a student to take the degree in their academic plan.

Reminder

If no checklist is assigned to a particular student or the wrong checklist is assigned, you may add a new checklist and remove the old one. You may also add and remove specific checklist items to or from a student’s checklist.

Navigation

Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management - Person

Page Steps

Checklist Management – Person search

Checklist Management - Person

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Limit the number of results to (up to 300):

ID:

Sequence Number:

Administrative Function:

Checklist Code:

National ID:

Unity ID:

Last Name:

First Name:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Step 1 Enter the EmplID or name to access the checklist for the appropriate person.

Step 2 Click

Page / Tab Name Checklist Management – Person / Checklist Management 1

Checklist Management 1

ID:

Checklist Date Time: 02/06/2009 10:04:37AM

*Administrative Function: Student Program

*Academic Institution:

*Checklist Code: Doctoral Checklist **1**

*Status: Status Date: 02/06/2009

Due Date: **2**

Due Amount: Currency Code

Comments: **3**

Step 1 Insure that the student is assigned the correct Checklist, or adjust if necessary

Step 2 Enter the student's time limit date in the due date field

Step 3 Enter comments as deemed necessary

Page / Tab Name Checklist Management – Person / Checklist Management 2

Checklist Management 1 Checklist Management 2

Bushra Anjum ID: 000823268

Checklist Date Time: 02/06/2009 10:04:37AM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 02/06/2009

Checklist Code: Doctoral Checklist Due Date: 02/07/2009

*Sequence	*Item	Description:	*Status	*Status Date	*Due Date
100	GTRANS	Graduate Transcript	Received	01/10/2008	01/10/2008
Responsible ID: 000004290 Name: Digh, Kimberly Shipp					
200	GPATEN	Patent Agreement	Received	07/06/2011	02/07/2009
Responsible ID: 000004290 Name: Digh, Kimberly Shipp					
300	GCOMM	Graduate Advisory Committee	Received	07/06/2011	02/07/2009
Responsible ID: 000004290 Name: Digh, Kimberly Shipp					
400	GPOW	Graduate Plan of Work	Received	07/06/2011	02/07/2009
Responsible ID: 000004290 Name: Digh, Kimberly Shipp					

Step 1 In the Checklist Item Table locate the item GCOMM (Committee). Set the status to completed and enter the status date.

Step 2 In the Checklist Item Table locate the item GPOW (PlanofWork). Set the status to completed and enter the status date.

Step 3 Save the checklist

Query To Generate List of Graduate Faculty Members

*Overview and
Objectives*

SIS_GRADUATE_FACULTY_LIST

While reviewing Graduate Advisory Committees, users can view a list of all active members of the Graduate Faculty. Fields displayed are Graduate Faculty Member EMPLID and Name, Department Description, Academic Rank Description, Graduate Faculty Status and Date Awarded, Tenure Home Department Description.

Navigation

Student Information System Homepage > Reporting Tools Tile > Query Viewer

See detailed instructions for running queries in Appendix, “Instructions for Running a Query”

Note

Queries are available for viewing Graduate Faculty and Programs. Refer to Section titled “Queries for Graduate Faculty Status”.

Updating Graduate Student Plans of Work and Advisory Committees

Objectives

Advisory Committees can be entered by students through Student Self-Service. They can also be entered by the Director of Graduate Program or Graduate Services Coordinator. Graduate Records Officers can enter these as well. Committees entered by other users can be updated by Graduate Records Officers as well.

Reminder

Plans of Work and advisory committees previously approved by the Graduate School must be recycled through work flow after updates in the Graduate School. Graduate Records Officers should resubmit the plan through work flow and approve it for both the DGP and the Graduate School unless they wish to require a DGP’s re-approval. DGP Worklist Tile items are routed to the College Liaison Worklist Tile for easy filtering and access.


Navigation

Student Information System Homepage > Advising Tile > Graduate Plan of Work

Step 1

Search for the plan of work using either student name or ID number.

Step 2

If the plan of work is currently in workflow, you will need to click the  button at the bottom of the plan of work tab, in order to make changes.

Step 3

Proceed to make updates to the plan of work and/or committee. When finished, you will need to click the Save button, and click the Submit for Approval button to send it back into workflow. If you do not need the DGP approval on your changes, you can follow the steps below, on how to “recycle” the plan of work and get it back into your Worklist Tile.

Advisory Committee External/Technical Consultant Appointments

Objectives

External members and technical consultants can be added as members of the committee. These are member types. These member types may be added by any user creating the committee. Approval of these member types is included as part of the Graduate Records Officer review.

Reminder

If a Graduate Records Officer wishes to modify an existing committee, the committee must be reset.


Navigation

Student Information System Homepage > Student Records Tile > Graduate Plan of Work

Page Steps

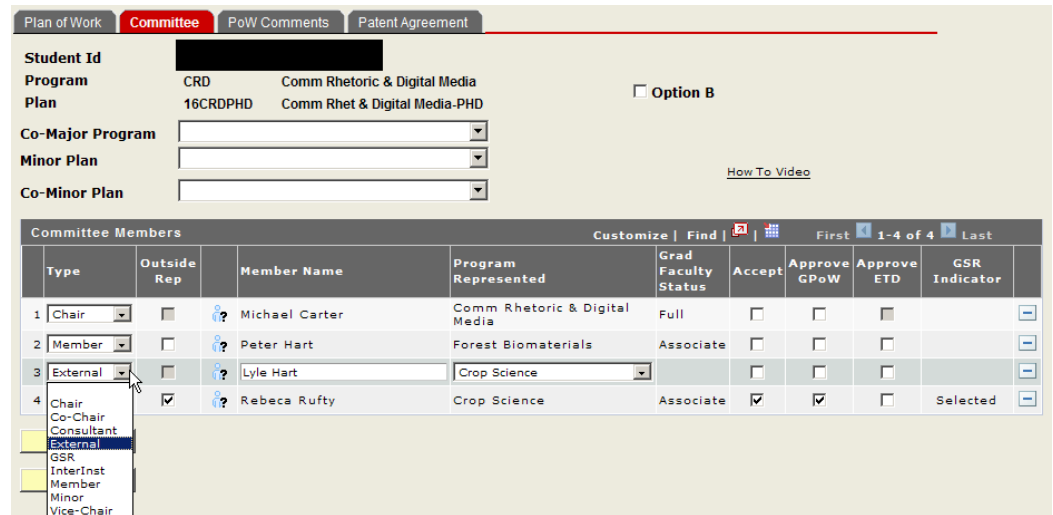
Graduate Plan of Work > Committee tab

Step 1

Click the  button to add a member

Step 2

Select either External or Consultant from the Type drop-down.



The screenshot shows the 'Committee' tab in the Graduate Plan of Work system. The 'Add Row' button is highlighted. Below it, the 'Type' dropdown menu is open, showing options: Chair, Co-Chair, Consultant, External, GSR, InterInst, Member, Minor, and Vice-Chair. The 'External' option is selected.

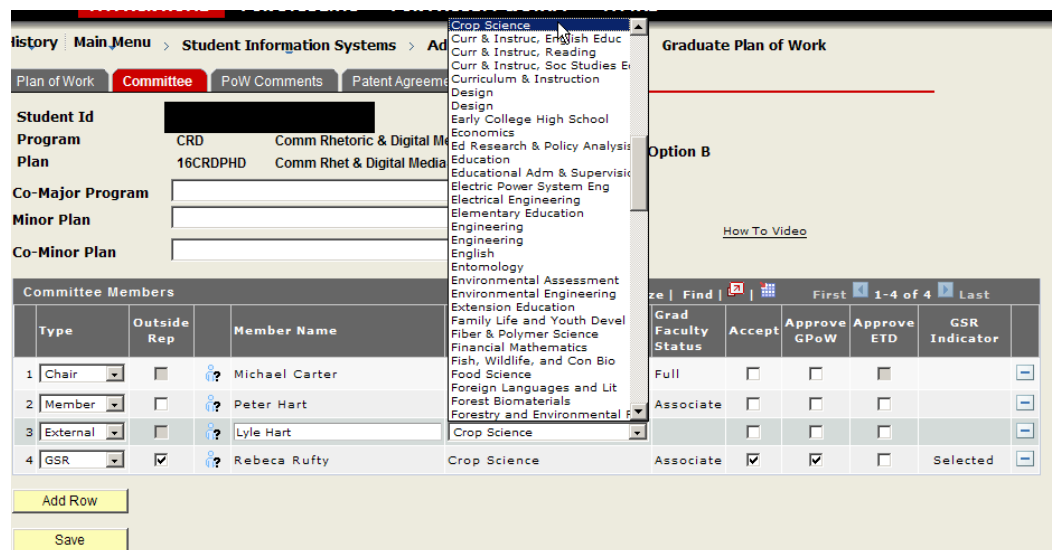
Type	Outside Rep	Member Name	Program Represented	Grad Faculty Status	Accept	Approve GPoW	Approve ETD	GSR Indicator
1 Chair		Michael Carter	Comm Rhetoric & Digital Media	Full				
2 Member		Peter Hart	Forest Biomaterials	Associate				
3 External		Lyle Hart	Crop Science					
4 Chair		Rebecca Ruffy	Crop Science	Associate				Selected

Step 3

Enter the name in the name field

Step 4

Select the program represented by this member if applicable. This is not required by the system.



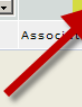
The screenshot shows the 'Committee' tab with the 'Program Represented' dropdown menu open for the 'External' member. The menu lists various programs, including 'Crop Science', 'Curriculum & Instruction', 'Design', 'Early College High School', 'Economics', 'Ed Research & Policy Analysis', 'Education', 'Educational Adm & Supervision', 'Electric Power System Eng', 'Electrical Engineering', 'Elementary Education', 'Engineering', 'Entomology', 'Environmental Assessment', 'Environmental Engineering', 'Extension Education', 'Family Life and Youth Development', 'Fiber & Polymer Science', 'Financial Mathematics', 'Fish, Wildlife, and Conservation Biology', 'Food Science', 'Foreign Languages and Literature', 'Forest Biomaterials', and 'Forestry and Environmental Science'. 'Crop Science' is selected.

Type	Outside Rep	Member Name	Program Represented	Grad Faculty Status	Accept	Approve GPoW	Approve ETD	GSR Indicator
1 Chair		Michael Carter	Comm Rhetoric & Digital Media	Full				
2 Member		Peter Hart	Forest Biomaterials	Associate				
3 External		Lyle Hart	Crop Science					
4 GSR		Rebecca Ruffy	Crop Science	Associate				Selected

Step 5

Indicate acceptance and approval for the external member.

Committee Members									
Type	Outside Rep	Member Name	Program Represented	Grad Faculty Status	Accept	Approve GPoW	Approve ETD	GSR Indicator	
1 Chair	<input type="checkbox"/>	Michael Carter	Comm Rhetoric & Digital Media	Full	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2 Member	<input type="checkbox"/>	Peter Hart	Forest Biomaterials	Associate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3 External	<input type="checkbox"/>	Lyle Hart	Crop Science		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
4 GSR	<input checked="" type="checkbox"/>	Rebecca Rufty	Crop Science	Associate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Selected	



Step 6

Save the record

Note: If the plan of work was reset for the change, you will need to go back to the plan of work tab and click the “Submit for Approval” button to put it back into workflow.

Graduate Faculty Members Programs

Objectives

A member of the graduate faculty may have membership in multiple academic programs.

Navigation

Student Information Systems > Reporting Tools Tile > Query Tools Folder > Query Manager

The query is: **SIS_GRADUATE_FACULTY_LIST**

Advisory Committee Inter-Institutional Member Appointments

Objectives

Inter-institutional members can be added as members of the committee. These are member types.

Reminder

If a Graduate Records Officer wishes to modify an existing committee, the committee must be reset.

Navigation

Student Information System Homepage > Advising Tile > Graduate Plan of Work

Page Steps

Graduate Plan of Work > Committee tab

Step 1

Click the button to add a member

Step 2

Select InterInst from the Type drop-down.

The screenshot shows the 'Committee' tab in a web application. It includes fields for Student Id, Program (PSY Psychology), Plan (16PSYMS Psychology-MS), Co-Major Program, Minor Plan, and Co-Minor Plan. Below these is a 'Committee Members' table with columns: Type, Outside Rep, and Member Name. Row 1 shows 'Chair' as the type and 'Anthony Hall' as the member name. A dropdown menu is open for the 'Type' field of row 2, showing options: Chair, Co-Chair, Consultant, External, GSR, InterInst (highlighted), Member, Minor, and Vice-Chair.

Step 3 Enter the name in the name field

Step 4 Select the program represented by this member if applicable. This is not required by the system.

This screenshot shows the 'Committee Members' table with an additional column 'Program Represented'. Row 1: Chair, Anthony Hall, Psychology, Associate. Row 2: InterInst, Erica Braman, Psychology. A dropdown menu is open for the 'Program Represented' field of row 2, showing a list of programs including Psychology (highlighted), Poultry Science, Public Administration, Public History, and Registration & Records. There are 'Add Row' and 'Save' buttons at the bottom.

Step 5 Indicate acceptance and approval for the external member.

This screenshot shows the 'Committee Members' table with additional columns: 'Accept', 'Approve GPoW', 'Approve ETD', and 'GSR Indicator'. Row 1 (Chair, Anthony Hall) has checkboxes for Accept and Approve GPoW. Row 2 (InterInst, Erica Braman) has checkboxes for Accept and Approve GPoW, which are circled in blue. The 'Approve ETD' and 'GSR Indicator' columns are empty for both rows.

Step 6 Save the record

Note: If the plan of work was reset for the change, you will need to go back to the plan of work tab and click the “Submit for Approval” button to put it back into workflow.

Advisory Committee Replacement or

Substitution of a Member

Objectives

Graduate Records Officers can remove existing committee members and add new ones.

Reminder

Members of the graduate faculty added to advisory committees are sent invitations to serve by email when they are added. If you do not wish a replacement or substituted member to receive this invitation you must accept and approve for them. Replacements must be updated on the GPoW upon approval from the Graduate Dean, once the GPoW is reset.

Navigation

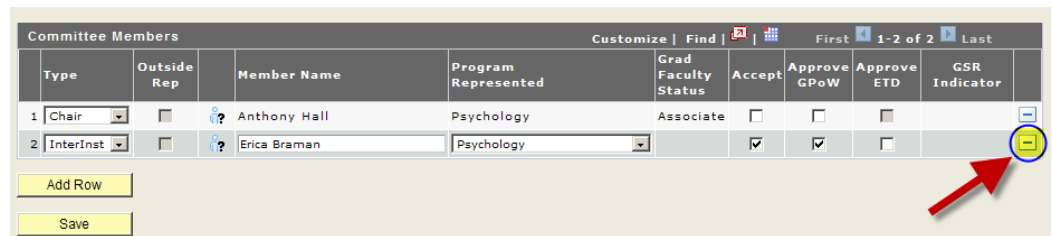
Student Information System Homepage > Advising Tile > Graduate Plan of Work

Page Steps

Graduate Plan of Work > Committee tab

Step 1

To remove an existing member, click the delete button on the right side of the member row.

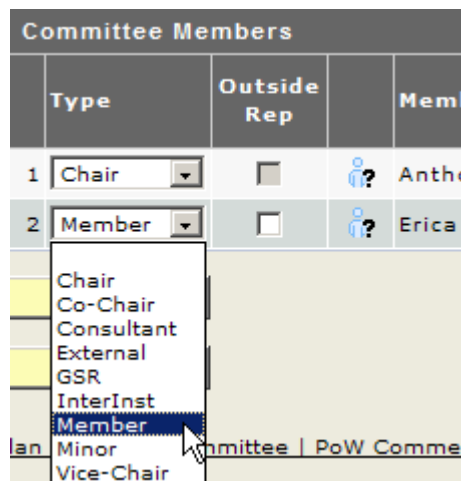


Step 2

Click the **Add Row** button to add the replacement member.

Step 3

Choose the member type from the Type drop-down



Step 4

Click to find the new member on the graduate faculty

Step 5

Enter all or part of the graduate faculty member's last, first and/or middle name and click look-up. Entering more letters of the name will make the search work faster. Entering part of a name may return multiple names. A record will be returned for each academic program the graduate

faculty member is approved in. To select an individual and the academic program they represent for this committee, click on the name link. You may sort the results list by clicking on name or academic program.

Faculty Member Search

Enter full or partial search fields and press the Look Up button. Use the Clear button to clear the selection criteria. To select an individual, click on the name link.

Last Name begins with

First Name begins with

Middle Name begins with

Name	Academic Program
Anona Smith	LS Liberal Studies
Carl Smith	TTM Textile Technology Management
Carl Smith	TE Textile Engineering
Carl Smith	TC Textile Chemistry
Carl Smith	GR Graduate Unclassified
Carl Smith	FPS Fiber & Polymer Science
Charles Smith	RMA Riomathematics

View All | First 1-45 of 45 Last

Click to sort (on Name column)

Click to sort (on Academic Program column)

Click to select (on Carl Smith name link)

Click the Save button to save changes.

If you do not want the new committee member to receive an email for acceptance and approval, check both boxes to the right of their program.

Note: If the plan of work was reset for the change, you must go back to the plan of work tab and click the "Submit for Approval" button to put it back into workflow.

Updating Advisory Committee For Addition of Graduate School Representative

Objectives

Graduate Records Officers can add Graduate School Representatives to the committee.

Navigation

Student Information System Homepage > Student Records Tile > Graduate Plan of Work

If a Graduate Records Officer wishes to modify an existing committee, the plan of work must be reset. Click the button at the bottom of the plan of work tab.

Page Steps

Graduate Plan of Work > Committee tab

Step 1

Click the button to add the new member.

Step 2

Choose the member type from the Type drop-down

The screenshot shows a table titled "Committee Members" with columns "Type", "Outside Rep", and a user icon. Row 1 has "Chair" selected in the Type dropdown. Row 2 has "GSR" selected. A dropdown menu is open for the Type column, showing options: Chair, Co-Chair, Consultant, External, GSR (highlighted), InterInst, Member, Minor, and Vice-Chair.

Step 3

Click to find the new member on the graduate faculty

Enter all or part of the graduate faculty member's last, first and/or middle name and click look-up. Entering more letters of the name will make the search work faster. Entering part of a name may return multiple names. A record will be returned for each academic program the graduate faculty member is approved in. To select an individual and the academic program they represent for this committee, click on the name link.

The screenshot shows the "Faculty Member Search" interface. It has search fields for Last Name, First Name, and Middle Name, each with a "begins with" label. The Last Name field contains "SMITH". Below the fields are "Look Up", "Clear", and "Cancel" buttons. The "Look Up" button is circled in blue. A red arrow points to the search fields. Below the buttons is a table of results with columns "Name" and "Academic Program". The table lists several records for "Smith" across different programs. Annotations include "Click to sort" pointing to the Name and Academic Program headers, and "Click to select" pointing to a name in the table.

Name	Academic Program
Anona Smith	LS Liberal Studies
Carl Smith	TTM Textile Technology Management
Carl Smith	TE Textile Engineering
Carl Smith	TC Textile Chemistry
Carl Smith	GR Graduate Unclassified
Carl Smith	FPS Fiber & Polymer Science
Charles Smith	BMA Biomathematics

Step 4

Save the record

Remember to check the acceptance and approval boxes.

Note: If the plan of work was reset for the change, go back to the plan of work tab and click the “Submit for Approval” button to put it back into workflow.

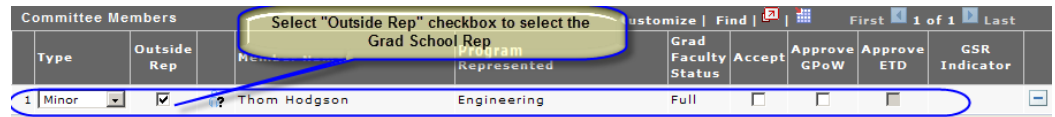
Add Graduate School Rep Committee Member

There are two options when adding a Grad School Rep (GSR).

1. If the person is already on the student’s committee.
2. If the student does not currently have a role on the committee.

Add Graduate School Rep- already on the committee

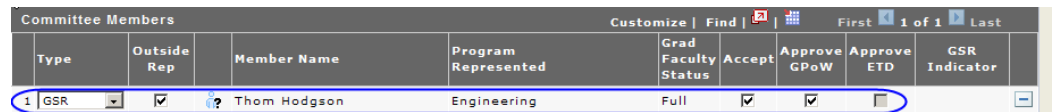
If the GSR is a person that is already on a student’s committee and they represent a plan that is not the same as the students major. In this case the student can select the "outside rep" check box.



Type	Outside Rep	Member Name	Program Represented	Grad Faculty Status	Accept	Approve GPoW	Approve ETD	GSR Indicator
1 Minor	<input checked="" type="checkbox"/>	Thom Hodgson	Engineering	Full	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Add Graduate School Rep- No other role on the committee

If the GSR has no other role on the committee, then you select the GSR "type"



Type	Outside Rep	Member Name	Program Represented	Grad Faculty Status	Accept	Approve GPoW	Approve ETD	GSR Indicator
1 GSR	<input checked="" type="checkbox"/>	Thom Hodgson	Engineering	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Query for Graduate School Representatives

Overview and Objectives

SIS_GRAD_REP

This query allows Graduate School personnel to view, for each Graduate School Representative on a graduate committee for a student, the attempted dates for the preliminary oral and final oral exams.

Navigation

Student Information System Homepage > Reporting Tools > Query Tools Folder > Query Viewer

See detailed instructions for running queries in Appendix, “Instructions for Running a Query”

Changing, Removing Or Adding A Course On the Plan of Work

Objectives

Graduate Records Officers can modify Plans of Work and Committees and then give Graduate School approval.

Navigation

Student Information System Homepage > Student Records Tile > Graduate Plan of Work

Step 1

Search for the plan of work using either student name or ID number.

Step 2

If the plan of work is currently in workflow, click the **Reset** button at the bottom of the plan of work tab, in order to make changes.

To Add A Course

Click the “Add Row” button.

1. Choose a course type
2. Click “Select” to add the first course (See steps 1-2 below). Course Description, Class, and Unit values will default.
3. Use the drop down arrow to choose the term for future courses
4. Click the “Add Row” button to add additional courses
5. Click to delete the row
6. Click **Save** to save changes at any time.
7. Important: **Start Over** permanently clears all values and rows

After all changes, make sure that you click the **Submit For Approval** button, to send the plan of work back into workflow.

Step 1

Course Search

Search Against

- ☐ Course Catalog
- ☒ My Graduate Transcript
- ☐ My Graduate Non-degree Transcript
- ☐ Transfer Credit

Subject

Catalog Nbr

You may add courses from the course catalog, NC State graduate career transcript, NC State non-degree transcript, or as transfer credit. In the search fields enter a subject. You may also enter a catalog number to filter the search results further. (Skip to step 2, if not selecting Transfer credit)

Note: Transfer credit is used to manually enter specific courses from an external institution or lump-sum hours from a previous graduate degree at NC State or an external institution.

Click the radio-button beside transfer credit, click Search and click on the link “Transfer Credit”. Once you return to the plan of work, you will need to enter a description in the requirement field along with the appropriate units (credit hours) for the transfer credit.

Course Search

Search Against

- ☐ Course Catalog
- ☐ My Graduate Transcript
- ☐ My Graduate Non-degree Transcript
- ☒ Transfer Credit

Subject

Catalog Nbr

Find View All		
Subject	Catalog	Course
TR	999	<u>Transfer Credit</u>

Step 2

Course Search

Search Against

☐ Course Catalog

☒ My Graduate Transcript

☐ My Graduate Non-degree Transcript

☐ Transfer Credit


Subject

Catalog Nbr

Subject	Catalog	Course	Term Taken	Units	Grade	
PSY	710C	ST-Wom Comm Power	Fall '08	3.0	A-	detail
PSY	800	Int Grad Study Psy	Fall '08	1.0	S	detail
PSY	511	Adv Social Psych	Spring '09	3.0	A	detail
PSY	506	Psych of Gender	Fall '09	3.0	B	detail
PSY	710	Spec Topics Psych	Spring '10	3.0	A	detail
PSY	880	Directed Study Psy	Fall '10	3.0	S	detail
PSY	880	Directed Study Psy	Spring '11	3.0	S	detail
EAC	749	Finance Higher ED	Fall '11	3.0	A	detail
EAC	787	Org Theor in Hed	Spring '12	3.0		detail
ELP	724	Contemp ED Thought	Fall '12	3.0		detail

1. Search results may be sorted by clicking any column header.
2. Select a course by clicking the link in the Course column.

To Change or Remove a Course

Removing courses: Locate the course(s) you wish to remove and click the  button to delete the row.

Changing courses: It is best to delete the row that needs to be changed, and follow the above steps to add a row and add the new course.

Adding/Deleting a Course On An Approved Plan of Work

Overview & Objectives

Once Plans of Work have been approved by the Graduate School they may be updated by following the below steps. Once initially approved by the Graduate School, plan of work Change Tracking is invoked. This feature allows users to see what types of course changes have been made, if any. This section describes how users can modify existing graduate Plans of Work after they have been approved by the Graduate School. This includes changing courses and committee members.

Navigation

Student Information System Homepage > Advising Tile > Graduate Plan of Work

Reminder

After approval by the Graduate School the plan of work is assigned a status of **Approved**. The status messages displays: This plan of work and advisory committee has been approved. Contact your academic department if you need to modify the plan. (28500, 4).

Step 1

To update a plan of work after initial approval by the Graduate School, it must be reset by clicking the **Reset** button at the bottom of the plan of work screen.

Step 2

Check the box to the left of the course that you wish to change and click the **Change Selected Row** button. The selected course is highlighted as **(Replaced)** and a new row inserts immediately above or below it. If you wish to replace the previous course, click the **Select** button on the new, blank row and choose a new course following the same procedure referenced for creating the initial plan of work.

Note: if you only want to delete the course on the **(Replaced)** row, then you should leave the new row blank.

<input type="checkbox"/>	Major	DR Supervised Res	Select	CSC 893	9.0	Spring '10	S
<input checked="" type="checkbox"/>	Major	Replacing DR Supervised Res	Select	CSC 893	9.0	Fall '10	S
<input type="checkbox"/>	Major		Select				
<input type="checkbox"/>	Major	DR Dissertat Res	Select	CSC 895	9.0	Spring '11	S
<input type="checkbox"/>	Major	DR Dissertat Res	Select	CSC 895	9.0	Fall '11	S

Buttons: Add Row, Change Selected Row, Save, Submit For Approval, Start Over

Step 3

Once the new course has been selected it will be highlighted as well. **Course changes for previously approved plans are tracked until the revised plan is reapproved by the Graduate School.**

<input type="checkbox"/>	Major	DR Supervised Res	Select	CSC 893	9.0	Spring '10	S
<input checked="" type="checkbox"/>	Major	Replacing DR Supervised Res	Select	CSC 893	9.0	Fall '10	S
<input type="checkbox"/>	Major	DR Dissertat Prep	Select	CSC 899	3.0	Spring '12	
<input type="checkbox"/>	Major	DR Dissertat Res	Select	CSC 895	9.0	Spring '11	S
<input type="checkbox"/>	Major	DR Dissertat Res	Select	CSC 895	9.0	Fall '11	S

Buttons: Add Row, Change Selected Row, Save, Submit For Approval, Start Over

Step 4

Committee changes may be made following the same procedure outlined for making changes prior to Graduate School approval. Committee changes are not tracked.

Step 5

Be sure to Save your changes and when finished, click the “Submit for Approval” button to send it through workflow again. It will only go to committee members if you have unchecked the boxes next to their name.

Note: Changes are NOT required for students taking courses during a different term than originally scheduled on the plan, these will auto-populate with the correct term once the course is posted to the transcript.

Approving Plans of Work and Committees Modified By The Graduate School (Recycling)

Objectives

Graduate Records Officers can modify Plans of Work and Committees and then give Graduate School approval, by “over-riding” DGP approval.

Reminder

Plans of Work and advisory committees modified in the Graduate School must be resubmitted through work flow. Work flow is managed using your Worklist Tile. Work flow requires that any member of the committee not marked as accepted and approved must re-approve. Any modified plan of work and advisory committee must be reapproved by the DGP and Graduate School. Graduate Records Officers may reapprove for the DGP (if appropriate) before approving in their own capacity.

Navigation

Student Information System Homepage > Worklist Tile > Graduate Plan of Work

Step 1

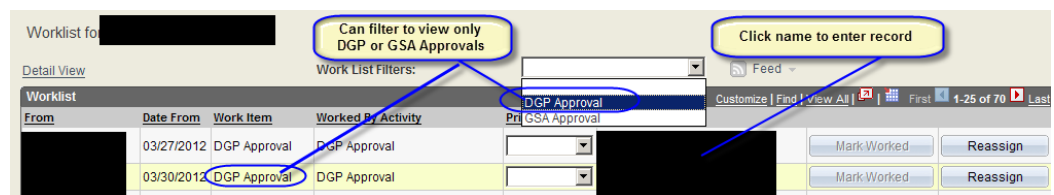
Once any Graduate School modifications to the plan of work or committee are complete, click

Submit For Approval

Step 2

Return to your Worklist Tile (Student Information System Homepage > Worklist Tile > Worklist).

You will see an item for this student with the item label of “DGP Approval” (you can use the sort filter at the top of your Worklist Tile to only view those that require “DGP Approval”). Click on the student’s name to enter the record.



Step 3

Scroll to the bottom of the Graduate Plan of Work record, and click **Approve**. You have now approved your updates/changes at the DGP level. It now needs to be approved at the Graduate School Records Officer level.

Step 4

Return to your Worklist, and you will see an item for this student with the label “GSA Approval”.

Worklist for [redacted]

Can filter to view only DGP or GSA Approvals

GSA Approval

Click name to enter record

Detail View

From	Date From	Work Item	Worked By Activity	Priority	Link
[redacted]	04/16/2012	GSA Approval	Graduate School Approval		
[redacted]	04/23/2012	GSA Approval	Graduate School Approval		

Mark Worked Reassign

Plan of Work Committee PoW Comments Patent Agreement

Student Id [redacted]

Program MBA Business Administration

Plan 20MBAMR Business Administration - Part Time

Status **Pending**

Date First Submitted 04/16/2012

Complete degree before Spring '16

Total Units Planned 45.00

Plan of Work GPA 4.000

Degree Requirements

GSR Comments

The plan of work and advisory committee have been submitted for approval. They are awaiting Graduate School Administrator Approval in the approval process

Type	Requirement/Course Description	Class	Units	Term	Enrolled	Grade
Major	Leadership & Ethics	Select				

Approve Return to Student for Update Back to DGP

This marks the PoW as DENIED

When you are viewing the student's Graduate Plan of Work record, click

Approve

The student's Graduate Plan of Work and Student Advisory Committee are now approved.

Plan of Work Committee PoW Comments Patent Agreement

Student Id 000979506 Shobhan Kumar Dutta

Program MBA Business Administration

Plan 20MBAMR Business Administration - Part Time

Status **Approved**

Date First Submitted 04/16/2012

Complete degree before Spring '16

Total Units Planned 45.00

Plan of Work GPA 4.000

Degree Requirements

GSR Comments

This plan of work and advisory committee have been approved (10-8-2012). Contact your academic department if you need to modify the plan.

Move or Delete Plan Of Work

Overview

In SIS, administrators can move a plan of work from a discontinued or changed plan, to a newly active plan (such as MS to MR); administrators can also delete a plan of work from an inactive or discontinued plan.

Navigation

Student Information System Homepage > Advising Tile > Move or Delete Plan of Work

Page Name

Move or Delete Plan of Work


1. Enter the EmplID (student ID number) and click Search.

Move or Delete Plan of Work

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300): 300

Empl ID: 

Academic Career:

Academic Program:

Academic Plan:

Effective Term:

Search

Clear

Basic Search

Save Search Criteria

- If the plan of work does not open, then this student did not previously complete a plan of work in the inactive/discontinued plan. Otherwise, the plan of work should appear as in the below picture.

Move/Delete GPoW

MOVE TO

Acad Plan Template

**The Graduate Plan of Work must be submitted for approval again, either by the student or an administrator

DELETE

Delete

Program ENGR Effective Term 1836 Max Yrs 6 Status Approved Appr Date 12/09/2009


Plan 14ENGRMR Engineering-MR

REQUIREMENTS

Type	Course List	Requirement/Course Description	Subject	Catalog	Units	Term
1 Major		Dsgn Auto Assembly	★ MAE	742	3.0	
2 Major		Manuf Product Eng	IE	514	3.0	
3 Major		Mgmt Dec Cont Syst	★ IE	546	3.0	
4 Major		Interact Narrative	★ CSC	582	3.0	
5 Major		Appl Engr Econ	IE	510	3.0	
6 Major		Realtm Ctl Aut Mfg	★ ISE	707	3.0	
7 Major		ST-Lean Production	★ ISE	589M	3.0	
8 Major		Human Fac Syst Des	ISE	540	3.0	
9 Major		SP Topics Bus Mgmt	BUS	590	3.0	
10 Major		Proj Work in ME	★ MAE	588	3.0	

★ Multiple Plans - This course is being used in multiple plans of work.

⚠ Non-degree Course - Credit for courses completed as a non-degree student is tentative pending approval by the Graduate School

 Return to Search

- If you will move the plan of work, use the drop down box beside Acad Plan, in order to select the plan to which you will move this plan of work. You will then need to use the drop down box beside Template, and select a template. Click the Move button. You will receive a confirmation pop-up after the move is complete. Note: If the student has

already created a plan of work for the newly active plan, then you will not be able to move the old plan of work.

4. If you do not want to move the plan of work, but will delete it, then simply click the Delete button. You will get a verification page, asking if you are sure that you want to delete this plan of work. Click Yes. You will receive a confirmation pop-up after the delete is complete.

Note: It is important to delete the old plan of work, if you will not move it to the new plan; so that the red stars, indicating multiple plans, do not cause confusion.

5. Last you will need to go to the Graduate Plan of Work page to submit for approval to put it back into workflow.

Query to Determine When Residence Credit Requirement Met for a Doctoral Student

Refer to section with same name in Graduate Administrator's Section

Overview and Objectives

SIS_GRAD_DR_RESID

Query allows the user to determine, for a doctoral student, at what term in the GPOW the student has met the requirements for residence credit.

Navigation

Student Information System Homepage > Reporting Tools > Query Viewer

See detailed instructions for running queries in Appendix, "Instructions for Running a Query"

Inquiring on Graduate Faculty Instructor Advisor Records

Objectives

This section describes the steps of inquiring on graduate faculty instructor advisor records.

Reminder

Academic programs and plans for which members or the graduate faculty have been approved to represent and serve in varying roles on advisory committees, are maintained in the Instructor Advisor table. Information on graduate faculty status and rank are maintained on the Tenure Data records. *Graduate Advisory Committees use these records in determining the appropriateness of a faculty member's role on the committee. When adding members to an advisory committee, only the academic programs to which the faculty member has been nominated and approved are displayed. Regardless of the academic program chosen and indicated by the committee member's name, the committee will only allow the member to serve in the capacity chosen, if their instructor Advisor records contain the appropriate program.*

Navigation

To inquire directly on the Instructor Advisor table navigate to Student Information System Homepage > Curriculum Management Tile > Instructor/Advisor Information Folder > Instructor/Advisor Table

Page Steps

Instructor/Advisor Table Search

Step 1

Enter the faculty member's name or ID number and search. If more than one result is returned by your search choose the appropriate entry from the Search Results. Search results may be sorted to assist in locating the proper entry.

Instructor/Advisor Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:


Unity ID:

National ID:

Last Name: **HODGE**

First Name: **G**

☐ Include History ☐ Correct History ☐ Case Sensitive

Search **Clear** Basic Search  Save Search Criteria

Search Results

View All First 1-19 of 19 Last

Empl ID	Name	Gender	Date of Birth	Unity ID	National ID	National ID Country	NID	Short Description	Last Name	First Name
	Hodge Jr, Gardner Clay	Male		(blank)	*****	USA	SSN		HODGE	GARDNER
	Hodge II, Garrv Alexander	Male		(blank)	*****	USA	SSN		HODGE	GARRY
	Hodge Gary Ray	Male		GRH	*****	USA	SSN		HODGE	GARY
	Hodge, George Lawrence	Male		GHODGE	*****	USA	SSN		HODGE	GEORGE
	Hodge Jr, Glenn Ivey	Male		(blank)	*****	USA	SSN		HODGE	GLENN
	Hodge, Gordon Wesley	Male		(blank)	*****	USA	SSN		HODGE	GORDON

Step 2

On the Instructor advisor tab, scroll through the Instructor/Advisor roles to view the academic programs and plans. Records containing only an academic program indicate all academic plans belonging to that program. Special entries are made for minor plans. *Graduate Records Officers may not update these records. These records may ONLY be updated by the Manager of Graduate Appointments.*

Processing Patent Agreements and Patent Agreement Acknowledgements (Non Thesis)

Objectives

Receipt of Patent Agreements and Patent Agreement Acknowledgements (non-thesis) are tracked on the student's checklist

Reminder

Checklists are assigned based on the student's academic plan. Available checklists and the checklist items contained on each are listed in the appendix section titled [Checklists](#). Students with multiple major academic plans may have multiple checklists.

Navigation

Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps

Checklist Management – Person / Checklist Management 1

Checklist Management 1 Checklist Management 2

Brianna ID: 00015

Checklist Date Time: 01/09/2009 3:34:08PM Variable Data

*Administrative Function: SPRG Student Program

*Academic Institution: NC State University

*Checklist Code: 1 GMR Masters Checklist

*Status: 2 Initiated Status Date: 01/09/2009

Due Date: 3 01/10/2009

Due Amount: Currency Code

Comments:

- Step 1* Insure that the Checklist code assigned is appropriate based on the student academic plan. If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).
- Step 2* Insure that the due date is set to the student's time limit date from their plan of work. Update if appropriate
- Step 3* Enter any necessary comments related to the patent agreement. Do not delete comments added previously.

Page Steps Checklist Management – Person / Checklist Management2

Checklist Management 1 Checklist Management 2

Alldi ID: 000724

Checklist Date Time: 02/06/2009 10:02:04AM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 02/06/2009

Checklist Code: Doctoral Checklist Due Date: 02/07/2009

Checklist Item Table

*Sequence	*Item	*Status	*Status Date	*Due Date
100	GTRANS Transcript	Received	04/02/2008	04/02/2008
200	GPATEN PatentAgre	Received	04/02/2008	04/02/2008

Responsible ID: 000007001 Name: Thompson, Dorothy J.

Step 1 In the Checklist Item Table locate the item **GPATEN (PatentAgre)**.

Step 2 Once the patent agreement has been processed set the status to completed and enter the status date. Save the checklist.

Processing Requests for Transfer Credit

Objectives This section describes the steps for having explicit course transfer credit added to a student's transcript. In SIS the Graduate School may request *internal transfer credit* so an NC State course from a non-grad career will be included on the GRAD career transcript.

Reminder The graduate plan of work is used for requesting transfer credit as part of the plan of work approval process. Transfer credit for specific non NC State courses already listed on the student's transcript in the graduate career may be added to the plan or work by the student, a graduate administrator or a Graduate Records Officer.

Step 1 Notify the department of Registration and Records in order to have explicit course transfer credit added to a student's transcript upon approval from the Graduate Dean.

Previous Masters Flag

Objectives When a department recommends someone for admission to a doctoral program, the department should indicate if the student has a relevant previous master's degree. When that record eventually exports to SIS, the page below is populated. This page powers the previous MR checkbox on the POW. This section describes the steps for correcting the MRs flag if it isn't checked in the GPoW, or if it is checked and shouldn't be.

Favorites | **Main Menu** > **Student Information Systems** > **Admin Services** > **Advising** > **Graduate Plan of Work**

Plan of Work | **Committee** | **PoW Comments** | **ETD Comments** | **Patent Agreement** | **Documents**

Student Id [REDACTED] **Complete degree before** Spring '16
Previous Master's: ☒ **Total Units Planned** 78.00
Program ERP Ed Research & Policy Analysis **Plan of Work GPA** 4.000
Plan 13ERPPHD Educa Rese & Pol Analysis-PHD
Status Approved
Date First Submitted 09/23/2011

This plan of work and advisory committee have been approved (10-19-2011). Contact your academic department if you need to modify the plan.

Comments

PoW Comments

Requirements								Find	First	1 - 19 of 19	Last
Type	Requirement/Course Description	Class	Section	Units	Term	Enrolled	Grade				
Major	MBA Degree (ECU)	TR 999		18.0							
Major	Foundational Core	ELP 780	000	3.0	Spring '06		A				
Major	Research Methods & Data Analys	ELP 736	000	3.0	Fall '06		A+				
Major	Research Methods & Data Analys	ELP 737	000	3.0	Spring '07		A+				
Major	Research Methods & Data Analys	ELP 742	000	3.0	Spring '07		A				
Major	Foundational Core	ELP 729	000	3.0	Sum 1 '07		A				
Major	Research Methods & Data Analys	ELP 795M	000	3.0	Fall '07		A-				
Major	Minor Area of Study	ECL 709A	000	3.0	Fall '07		A				
Major	Foundational Core	ELP 735	000	3.0	Spring '08		A-				
Major	Minor Area of Study	PSY 880	000	3.0	Spring '08		S				
Major	Applied Research	ELP 820	001	3.0	Sum 1 '08		S				

Navigation

Student Information System Homepage > Admissions Tile > Application Entry Academic Folder > Education

The screenshot shows the 'External Education' form in the SIS Training and Operations Manual. The form is divided into several sections: 'School Information', 'Career Data', 'Transcript Status', 'Transcript Summary', and 'External Subjects'. The 'School Information' section includes a search bar for 'External Org ID' and a search icon. The 'Career Data' section includes fields for 'Data Number', 'Term Type', 'Term Year', 'From Date', 'To Date', 'Career', 'External Term', 'Academic Level', and 'Dismissed from School'. The 'Transcript Status' section includes a table with columns for 'Action', 'Transcript Date', 'Date Received', 'Transcript Type', 'Transcript Status', 'Data Source', and 'Data Medium'. The 'Transcript Summary' section includes a table with columns for 'Summary Type', 'External Term', 'Ext Year', 'Acad Level', and 'Institution'. The 'External Subjects' section includes a table with columns for 'GPA' and 'Subject Totals'. A red box highlights the 'External Org ID' field, and a blue box highlights the search icon next to it. A yellow box highlights the 'Add New Row' button in the Transcript Summary table.

See if a university is listed under “External Org ID:” If it is blank begin with step 1.

Step 1

Add a New Row if the school in question does not exist.

Step 2

Select the search option to search by city and state.

Look Up External Org ID

External Org ID: begins with

Description: begins with

Search Name: begins with

Organization Type: begins with

City: begins with

State: begins with

Country: begins with

[Basic Lookup](#)

Search Results

View 100 First 1-10 of 10 Last

External Org ID	Description	Search Name	Organization Type	City	State	Country
000219097	East Carolina University	EASTCAROLINAUNIVERSITY	SCHL	Greenville	NC	USA
000219311	Pitt Cmty College	PITTCMTYCOLLEGE	SCHL	Greenville	NC	USA
000240115	Calvary Christian Academy	CALVARYCHRISTIANACADEMY	SCHL	Greenville	NC	USA
000240116	D H Conley High School	DHCONLEYHIGH SCHOOL	SCHL	Greenville	NC	USA
000240117	Greenville Christian Academy	GREENVILLECHRISTIANACADEMY	SCHL	Greenville	NC	USA
000240118	Junius H Rose High School	JUNIUSHROSEHIGH SCHOOL	SCHL	Greenville	NC	USA
000240119	Right Step Academy	RIGHTSTEPACADEMY	SCHL	Greenville	NC	USA
000240120	Trinity Christian School	TRINITYCHRISTIANSCHOOL	SCHL	Greenville	NC	USA
000240121	Victory Christian Academy	VICTORYCHRISTIANACADEMY	SCHL	Greenville	NC	USA
000934098	The Oakwood School	THEOAKWOODSCHOOL	SCHL	Greenville	NC	USA

Step 3

Once the search window appears, click on the school name. The information will autopopulate (search by school name, not abbreviation).

Favorites Main Menu > Student Information Systems > Records and Enrollment > Transfer Credit Evaluation

External Education Courses and Degrees

School Information Find | View All First 2 of 2 Last

*External Org ID:

☐ Checklist Item Update

School Details

Career Data Find | View All First 1 of 1 Last

Data Number: 1 *Career:

Term Type:

External Term:

Term Year:

Academic Level: Unknown ☐ Dismissed from School

From Date: To Date: [Comments](#)

Transcript Status

*Action	Transcript Date	Date Received	Transcript Type	Transcript Status	Data Source	Data Medium
Desired	02/20/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Transcript Summary Personalize | Find | View All First 1 of 1 Last

Term	GPA/Units	Rank	*Summary Type	External Term	Ext Year	Acad Level	Institution
1						Unknown	NC State U

External Subjects Personalize | Find | View All First 1 of 1 Last

GPA Subject Totals

*External

Step 4

Enter Grad for "*Career"

The screenshot displays the 'External Education' interface with the 'Courses and Degrees' tab selected. The 'External Organization' section shows details for 'NC State U'. The 'External Course Defaults' section includes fields for 'Data Number', 'Data Source', 'Acad Level', 'Institution', 'Course Type', 'Unit Type', 'Grading Scheme', 'External Career', 'Term Type', 'Begin Date', 'End Date', 'Course Level', 'Units Taken', and 'Grading Basis'. The 'External Courses' section shows a table with columns for 'Course Seq', 'School Subject', 'Description', 'Course Nbr', and 'Course Name'. The 'External Degrees' section shows a table with columns for 'Degree', 'Description', 'Degree Date', 'Data Source', 'Degree Status', and 'Honors Category'. Numbered callouts 5 through 8 point to specific fields: 5 points to the 'Degree' field in the 'External Degrees' table; 6 points to the 'Degree Date' field; 7 points to the 'Degree Status' field; and 8 points to the 'Transfer To' dropdown menu.

- Step 5* Enter MR/MS/DR etc. for “Degree”
- Step 6* Enter graduation date from transcript for “Degree Date”
- Step 7* Leave “*Degree Status” as complete.
- Step 8* Then save and verify the GPow flag has been updated.

Creating Plan of Work Templates

- Objectives* In SIS, administrators may create Plan of Work templates.
- Reminder* All academic plans have base templates. These base templates enforce only University level requirements.
- Navigation* Student Information System Homepage > Advising Tile > GPoW Templates
- Page Steps* See Creating Plan of Work Templates in [Graduate Administrators Section](#) of SIS Manual

Graduate Faculty Records Maintenance

Eligibility

Associate status

The necessary qualification for consideration as an Associate Member of the Graduate Faculty is appointment at the rank of Assistant Professor or higher, including special faculty appointments (adjunct, visiting, clinical, extension, practicum, research, teaching, and federal contractual employees, such as USDA, DOI, U.S. Forest Service, etc.) categories. Graduate Faculty status is awarded upon recommendation by the Department Head or Director of Graduate Programs (DGP) and approval by the Dean of the Graduate School.

If the candidate does not hold a doctoral degree, there must be demonstrable evidence that the candidate possesses the experience, knowledge, and capability in the area of intended participation in the graduate program of the university.

Full status

Full members of the Graduate Faculty are tenured (or tenure-track) faculty who have distinguished themselves in research, thesis direction, and graduate teaching. Evidence of such distinction is indicated by a number of significant publications, by service as chair of the advisory committees for several Master students or as co-chair of the advisory committees for doctoral students, and by excellence in graduate teaching. In certain instances, one or two of these experiences may be considered sufficient. Special faculty appointments (clinical, extension, practicum, research, teaching, and federal contractual employees, such as USDA, DOI, U.S. Forest Service, etc.) at the academic ranks of assistant professor or higher are also eligible for full membership status. A member of the Graduate Faculty holding full status may participate in all phases of the graduate program. Visiting and adjunct faculty members are NOT eligible for full graduate faculty status and thus cannot chair Ph.D. committees.

Responsibilities

Associate Status

- Teach courses carrying graduate credit;
- Participate as a member of advisory committees in planning graduate student programs;
- Chair Master advisory committees upon recommendation of DGP or Department Head;
- Co-chair doctoral advisory committees when committee chair holds full Graduate Faculty status;
- Serve as Graduate School Representative when requested by Graduate School (see Section 1.6).

Full Status

- Teach courses carrying graduate credit;

- Participate as a chair or member of advisory committees in planning of graduate student programs;
- Chair Master and doctoral advisory committees;
- Serve as Graduate School Representative when requested by Graduate School (see Section 1.6).

Review and Approval of Graduate Faculty Nomination

Objectives

This section describes the process for determining whether or not a faculty member who has been nominated for membership in the Graduate Faculty is eligible.

Reminder

Faculty members must meet certain eligibility requirements to serve as members of the Graduate Faculty. The HR System is used to verify eligibility.

Navigation

HR System Homepage > Workforce Administration > Job Information > Job Data

HR System Homepage > Workforce Development > Competency Management > Track Person Competencies > Education

Page Steps

When the Graduate Faculty Nomination Form is received in the Graduate School:

Check the HR System to verify that the faculty member has an active qualifying appointment, as defined in the Graduate Administrative Handbook. HR panels to be checked are:

1. Job Data – Use the Job Information tab to view current job title. Applicant should have an active appointment with appropriate rank.

Job Information		
Effective Date:	07/01/2008	Effective Sequence:
Action / Reason:	Pay Rt Chg	M
Job Code:	C715	Interim Dean
Supervisor Level:		


It is common for the job title to not be reflective of rank (Director, Department Head, Dean); therefore, the Create Tenure Data panel must also be checked.

2. Education – Check to verify highest educational level. (Human Resources System > Workforce Development > Competency Management > Track Person Competencies > Education)

If the faculty member does not meet the criteria outlined above, the department is notified by email of the ineligibility. If the HR System has incorrect information, the department must take necessary steps to correct.

Step 2

The Academic Organization (department) code is on the nomination form; use it as a parameter in the SIS Query named SIS_ACAD_ORG_OWNER_BY_PROG to generate a list of possible

Academic Programs. The magnifying glass  can be used to search the list if you are not certain of the Academic Organization code. Print the results and attach to the nomination form.

Step 3

Completed nomination form with attached list of academic programs is given to the Dean of the Graduate School for review and approval. The Dean will indicate on the list of academic programs those that are appropriate for the faculty member.

Step 4

Letters are generated and sent to new Graduate Faculty member with copies to Director of Graduate Programs, Department Head and Dean.

Step 5

The approved nomination form, the list of approved programs, and a copy of the letter are used to provide information for updating the Graduate Faculty Status in SIS.

Updating Graduate Faculty Status In the HR/SIS System

Objective

This chapter discusses updating the Graduate Faculty Status and the Instructor/Advisor Table in the Student Information System (SIS). Proper data entry insures that faculty members will be able to serve on appropriate committees. Graduate faculty and Instructor/Advisor records are maintained by the Graduate School.

Navigation 1

HR System Homepage > Workforce Development > Faculty Events > Track Events > Administrative Posts

Procedures

Two steps are required to update Graduate Faculty records

1. Update Administrative Post for Graduate Faculty Status (only HR can view)
2. Update the Graduate Faculty Instructor/Advisor Records (only scheduling officers can view)

Step 1

Work Location | Job Information | Payroll | Salary Plan | Compensation

EMP ID: 000 Empl Rcd #: 0

Work Location Find First 3 of 24 Last

HR Status: Active Payroll Status: Leave With Pay

*Effective Date: 07/01/2007 Sequence: 3 *Job Indicator: Primary Job

Action / Reason: Data Change Data Change

Last Start Date: 08/24/1981 Termination Date:

Expected Job End Date: End Job Automatically

Last Date Worked: 06/30/2007 Override Last Date Worked Expected Return Date:

Position Number: 00000389 Professor Position Entry Date: 07/01/1998

Override Position Data

Regulatory Region: USA United States

Company: NCS NC State University

Business Unit: NCSU1 NC State University Business Unit

Department: 120301 Graphic Design Department Entry Date: 07/01/1998

Location: 018 Design

Establishment ID: 001 NC State University

Date Created: 09/18/2007

Job Data Employment Data Earnings Distribution Benefits Program Participation Department Budget Update

Save Return to Search Notify Previous tab Next tab Refresh Update/Display Include History Correct History

Work Location | Job Information | Payroll | Salary Plan | Compensation

Enter Graduate Faculty Status and Date

Using the information within the letter issued by the Graduate School, enter the Graduate Faculty Status and the Graduate Faculty Status Date (from the approval letter) on the Nc Eg Faculty Data Tab.

Tenure Data | Nc Eg Faculty Data

Vote Assignment: Vote Assignment Date:

Graduate Faculty Status: Graduate Faculty Status Date:

Associate Status Dept Primary: Associate Status Dept Second:

Associate Full None

Choose either Associate or Full Status and enter date in DD/MM/YY format

Nepotism Information First 1 of 1 Last

Effective Date	Status	Related Employee ID	Name	Relationship to Employee
1 02/06/2009	Active			

Click to "Save"

Save Return to Search Notify

Tenure Data | Nc Eg Faculty Data

Navigation 2 Main Menu > Student Information Systems > Curriculum Management > Instructor/Advisor Information

Step 2 Adding Records to the Instructor/Advisor Table

The Instructor/Advisor Table panel maintains the programs and plans where the faculty member has Graduate Faculty Status.

The panel has two tabs Instructor/Advisor Table and Approved Courses, but all information will be entered on the Instructor/Advisor Table Tab. There are two sections on the Instructor/Advisor Table tab: Instructor Details and Instructor/Advisor Role. These sections are defined by bold blue headers.

Instructor Details

The current effective dated row of information is displayed.

- The current date will display as the effective date for all persons who have no records in place. Since there are no stored records, updating will be done on this page.
- A default effective date of 01/01/1901 reflects a conversion row and is in place for all persons who had data stored in a legacy system.
- A date of anything other than 01/01/1901 or the current date indicates that the record has been modified by another user.

Faculty members with an effective date other than the current date will need to have a new row inserted at the “Instructor Details” level; this is done by clicking on the “+”. The new row will insert with the current date as the effective date, and will be a duplicate of the current row. This page will be used to update the records.

Instructor/Advisor Table | [Approved Courses](#)

Duane Larick 000008734

Instructor Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1901 *Status: Active

*Instructor Type: Advisor Only ☒ Advisor

*Academic Institution: NCSU1 NC State University

*Primary Acad Org: 11FS Food Science

*Instructor Available: Available

Instructor/Advisor Role Find | View All First 1 of 9 Last

Advisor Number: 1 Percent of Appointment:

*Academic Career: GRAD Graduate

Academic Program: GR Graduate Unclassified

Academic Plan: 04GISGM Geographic Info Systems-GM

Academic Sub-Plan:

Save Return to Search Notify Update/Display Include History

[Instructor/Advisor Table](#) | [Approved Courses](#)

Instructor Details

Instructor Type Instructor

Advisor Flag should be checked

Primary Acad Org Enter appropriate value or click magnifying glass to search. This information will come from the Graduate Faculty Nomination Form, and each faculty member will have one primary acad org only.

Instructor Available Available

Instructor/Advisor Role

Academic Career GRAD

Academic Program Enter appropriate value or click magnifying glass to search. This field represents Major and is a derivative of the Primary Acad Org. A faculty member can have one or more academic programs.

Academic Plan Enter appropriate value or click magnifying glass to search. This field represents Minor. A faculty member can have one or more academic programs, or there could be none.

Additional rows can be added as needed. Initially, all programs and plans are directly tied to the Primary Academic Organization; however it is not unusual for other programs and plans to be added that are outside the Primary Acad Org.

Adding Minor-Only Plans

There are certain minors that are not attached to a specific program. Since a program is required to save an entry, GR – Graduate Unclassified is the program used for all Minor-Only Plans.

Instructor/Advisor Role		Find View All
Advisor Number:	<input type="text" value="1"/>	Percent of Appointment:
*Academic Career:	<input type="text" value="GRAD"/>	Graduate
Academic Program:	<input type="text" value="GR"/>	Graduate Unclassified
Academic Plan:	<input type="text" value="04BTCGM"/>	Biotechnology-GM
Academic Sub-Plan:	<input type="text"/>	

Queries for Graduate Faculty Status

Navigation

Student Information System Homepage > Reporting Tools > Query Tools > Query Viewer

See detailed instructions for running queries in Appendix, “Instructions for Running a Query”

List of Queries

SIS_GRADUATE_FAC_BY_PLAN

List of active members of the Graduate Faculty by user selected plan. (Typically best used for minor-type plans).

SIS_GRADUATE_FAC_BY_PROGRAM

List of active members of the Graduate Faculty by user selected program.

SIS_GRADUATE_FAC_PGMS_BY_ID

List of programs in which a faculty member has Graduate Faculty Status.

SIS_GRADUATE_FACULTY_LIST

List of all active members of the Graduate Faculty.

SIS_GRAD_INSTR_ADV_CRS_BY_PRFX

List of all approved teaching permissions for faculty members who are not members of the graduate faculty, by prefix.

Removing Records From the Instructor/Advisor Table

If a department wishes to withdraw the faculty member’s graduate faculty status in a specific program or programs, this request must be submitted in writing. Removing the programs is done by inserting a new row at the Instructor Details level using the current date, or other date if

requested, and deleting all programs and plans from the Instructor/Advisor Role and saving. Refer to Step 3.

Removing Graduate Faculty Status

If the primary academic department wishes to withdraw the faculty member's graduate faculty status, this request must be submitted in writing. Remove the:

1. Graduate Faculty Status, and
2. Graduate Faculty Status Date from the Nc Eg Faculty Data Tab on the "Create Tenure Data" panel. Refer to Step 2.

Graduate Student Records and Enrollment

Objectives

This section provides steps for processing all graduate student academic program plan actions as well as milestones and related checklist items.

Reminder

The appendix of this manual provides several helpful resources for processing the actions covered in this section. These include [Checklists](#), [Graduate Student Record Program Actions and Action Reasons](#) and the Graduate Records Officer Quick Reference (Under Construction).

Graduate Student Checklist and Milestone Record Maintenance

Master Option B Graduation Checkout

Objectives

Processing an Option B checkout request involves the maintenance of the student Checklist and Milestone records. The student's checklist keeps track of administrative tasks that must be completed by the student or on the student's behalf. The items on the checklist and the checklist itself must be marked completed or waived in order for a student to take the degree in their academic plan. Milestones are non-course related but vital academic requirements a student must complete toward degree progress to graduate. Students in the option B category typically have no other milestones other than complete of all option B requirements.

Reminder After the Option B checkout request has been reviewed and approved, update the student checklist and then the student milestone record. Milestones appear by default on the unofficial transcript.

Navigation [Checklist](#) record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps Checklist Management – Person search

Checklist Management - Person
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

ID: begins with 00019
Sequence Number: =
Administrative Function: begins with
Checklist Code: begins with
National ID: begins with
Campus ID: begins with
Last Name: begins with
First Name: begins with

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step 1 Enter the EmplID or name to access the checklist for the appropriate person.

Step 2 Click [Search](#)

Page / Tab Steps Checklist Management – Person / Checklist Management1

Checklist Management 1 Checklist Management 2

Erin D [redacted] ID: 0007 [redacted] Variable Data

Checklist Date Time: 01/09/2009 3:41:42PM

*Administrative Function: SPRG Student Program

*Academic Institution: NC State University

*Checklist Code: 1 GMROPB Masters Option B Checklist

*Status: 2 Initiated Status Date: 01/09/2009

Due Date: 3 01/10/2009

Due Amount: Currency Code

Comments:

Save Return to Search Notify

Step 1 Insure that the Checklist code is set to GMROPB (Masters Option B Checklist). If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2 Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments related to processing the Option B checkout request.

Page / Tab Steps Checklist Management – Person / Checklist Management2

Checklist Management 1 Checklist Management 2

ID: 0007

Checklist Date Time: 02/06/2009 10:32:23AM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 02/06/2009

Checklist Code: Masters Option B Checklist Due Date: 02/07/2009

*Sequence	*Item	*Status	*Status Date	*Due Date
100	GTRANS Transcript	Initiated	02/06/2009	02/07/2009
Responsible ID: 000007501		Name: Harris, Anita Hope		
200	GPATEN PatentAgre	Initiated	02/06/2009	02/07/2009
Responsible ID: 000007501		Name: Harris, Anita Hope		
300	GPOW PlanofWork	Initiated	02/06/2009	02/07/2009
Responsible ID: 000007501		Name: Harris, Anita Hope		
400	GOPTBC ReqOptBChk	Received	03/27/2009	02/07/2009
Responsible ID: 000007501		Name: Harris, Anita Hope		

Step 1

In the Checklist Item Table, locate the item GOPTBC (ReqOptBChk).

Step 2

Status = *Received* and enter the status date. Save the checklist.

Navigation

Student Milestone record maintenance: Student Information System Homepage> Student Records Tile > Enroll Students Folder > Student Milestones

Page /Tab Steps

Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. Students are often active in more than one academic program and have a milestone record for each. If incorrect milestones are assigned, insure that you have selected the proper academic program for the student. If the student milestones are indeed incorrect or missing, reference the sections titled [Adding New Milestones Individually](#) or [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Student Milestones | [Advisors/Completion Info](#) | [Milestone Attempts](#)

Erin Dahlen 000742177

Institution: NC State University Acad Prog: Accounting Career: Graduate

Find | View All First 1 of 1 Last

*Effective Date: 01/12/2009 Milestone Copy 1

Milestone Detail Find | View All First 1 of 1 Last

*Milestone Nbr: 10 *Milestone: MROPBREQ

Academic Plan: 20MACMR Accounting-MR

Description: MR Option B Requirements

Formal Description: Masters Option B Requirements

Milestone Level: Attempts Allowed:

Milestone Title:

Save Return to Search Notify Add Update/Display Include History Correct History

Student Milestones | [Advisors/Completion Info](#) | [Milestone Attempts](#)

Step 1

Students in pure Option B academic plans have just one milestone: *to complete all requirements for the option B*. Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may pre-date rows as long as the effective date used is after the effective date of the previous row.

Page /Tab Steps

Student Milestones – Milestone Attempts

Erin Dahlen 000742177

Institution: NC State University Acad Prog: Accounting Career: Graduate

Find | View All First 1 of 2 Last

Effective Date: 01/13/2009

Milestone: MROPBREQ MR Option B Requirements

Find | View All First 1 of 1 Last

Attempt Nbr: 1

How Attempted: Filed Petition Date Attempted: 01/09/2009

Grading Scheme: Grading Basis: *Milestone Complete: Completed

Grade Input: Course ID: Term: Reported Flag:

Save Return to Search Notify Add Update/Display Include History Correct History

Step 1

From the **How Attempted** drop-down choose **Filed Petition**.

- Step 2* In the **Date Attempted** field enter the date the request was approved by the Graduate School
- Step 3* In the **Milestone Complete** drop down choose **Completed**
- Step 4* Save the Milestone record

Processing Master Request to Schedule Final Oral Exam 1ST Attempt (Defense)

- Objectives* This process requires the update of the student's checklist and milestones.
- Reminder* After the request to schedule has been reviewed and approved, update the student checklist and then the student milestone record. Milestones appear by default on the unofficial transcript. If the scheduled exam date is not known, milestones will not be updated for a Masters Request to Schedule.
- Navigation* Checklist record maintenance: Student Information System Homepage> Student Records Tile > Checklists Folder > Checklist Management – Person
- Page/ Tab Name* Checklist Management – Person / Checklist Management1

- Step 1* Insure that the Checklist code is set to GMR (Masters Checklist) or GMROBM (Masters Mixed Option B Checklist). If an incorrect checklist code is assigned, insure that you have selected the

proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2 Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments related to processing the Request to Schedule.

Page / Tab Steps Checklist Management – Person / Checklist Management2

Step 1 In the Checklist Item Table locate the item GMPERO (MRreqPerms).

Step 2 Once the request has been processed set the status to *received* and enter the status date. Save the checklist

Navigation Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page / Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Student Milestones | Advisors/Completion Info | Milestone Attempts

Institution: NC State University Acad Prog: Public History Career: Graduate

Find | View All First 1 of 2 Last

*Effective Date: 01/13/2009 Milestone Copy

Milestone Detail Find | View All First 2 of 2 Last

*Milestone Nbr: 20 *Milestone: MR FINORAL

Academic Plan: 16PHMA Public History-MA

Description: MR Final Comprehensive Exam

Formal Description: Masters Final Comprehensive Examination

Milestone Level: Attempts Allowed: 2

Milestone Title:

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2 In the **Milestone Detail** section scroll to the **MR FINORAL Masters Final Comprehensive Examination** Milestone if you are not on that milestone.

Page / Tab Steps Student Milestones – Advisors/Completion Info

Student Milestones | Advisors/Completion Info | Milestone Attempts

Br 0001

Institution: NC State University Acad Prog: Public History Career: Graduate

Find | View All First 1 of 2 Last

Effective Date: 01/13/2009

Advisors Find | View All First 2 of 2 Last

Milestone: MR FINORAL MR Final Comprehensive Exam

*Transcript Level: Unofficial *Print Milestone Detail: Always

☐ Advised by Committee

Advisor/Evaluator 1:

Advisor/Evaluator 2:

Comment:

Completion Information Find | View All First 2 of 2 Last

Milestone: MR FINORAL MR Final Comprehensive Exam

Term Required: Unofficial

Date Required: Always

Anticipated Term: Not Completed

Anticipated Date: 01/13/2009

Milestone Complete: Not Completed Attempts Allowed: 2

Step 1 In the Completion Information section of the Advisors/Completion Info tab, enter scheduled exam date (if known) in the *Anticipated Date* field. If the scheduled date is not known, milestones will not be updated for a Masters Request to Schedule.

Step 2 Save the Student Milestone Record.

Processing Master Request to Schedule Final Oral Exam 2nd Attempt (Defense)

Objectives This process requires the update of the student's checklist and milestones.

Reminder After the request to schedule the 2nd attempt has been reviewed and approved, update the student checklist and then the student milestone record. Milestones appear by default on the unofficial transcript. If the scheduled exam date is not known, milestones will not be updated for a Masters Request to Schedule a 2nd attempt.

Page/ Tab Name Checklist Management – Person / Checklist Management1

Step 1 Insure that the Checklist code is set to GMR (Masters Checklist) or GMROBM (Masters Mixed Option B Checklist). If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2 Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments.

Page / Tab Steps Checklist Management – Person / Checklist Management2

The screenshots show the 'Checklist Management 2' interface. The first screenshot shows the 'Checklist Item Table' with a table header: *Sequence, *Item, *Status, *Status Date, *Due Date. A blue box labeled '1' points to the 'Item' column. A second blue box labeled '2' points to a '+' button in the top right corner of the table. The second screenshot shows the same table with a new row added. The 'Sequence' is 800, 'Item' is empty, 'Status' is 'Initiated', 'Status Date' is 01/09/2009, and 'Due Date' is empty. A blue callout bubble points to the '+' button and says: 'The new item looks like this when you click the +'. The third screenshot shows the same table with a new row added. The 'Sequence' is 510, 'Item' is 'GMPERO', 'Status' is 'Received', 'Status Date' is 03/30/2009, and 'Due Date' is 03/31/2009. A blue callout bubble points to the new row and says: 'The second attempt request checklist item looks like this when you finish'.

Step 1 In the Checklist Item Table locate the item GMPERO (MRreqPermS). This is the *received first request to schedule*.

Step 2 Once the request to schedule the second attempt has been processed, add a new GMPERO MRreqPermS item to the list immediately below the first request to schedule. Increment the

Sequence number by 10. Enter your Emplid. Set the status to *received* and enter the status date. Save the checklist.

Navigation

Student Milestone record maintenance: Student Information Systems > Student Records Tile > Enroll Students Folder > Student Milestones

Page /Tab Steps

Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1

Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the Milestone Detail section scroll to the MR FINORAL Masters Final Comprehensive Examination Milestone if you are not on that milestone.

Page / Tab Steps

Student Milestones – Advisors/Completion Info

The screenshot shows the 'Advisors/Completion Info' tab for a student milestone. The 'Completion Information' section is highlighted with a red circle. A blue box with the number '1' is placed over the 'Anticipated Date' field, with a line pointing to it from the text in Step 1.

Student Milestones | Advisors/Completion Info | Milestone Attempts

Br [REDACTED] 0001 [REDACTED]

Institution: NC State University Acad Prog: Public History Career: Graduate

Effective Date: 01/13/2009

Find | View All First 1 of 2 Last

Advisors

Find | View All First 2 of 2 Last

Milestone: MR FINORAL MR Final Comprehensive Exam

*Transcript Level: Unofficial *Print Milestone Detail: Always

☐ Advised by Committee

Advisor/Evaluator 1: [REDACTED]

Advisor/Evaluator 2: [REDACTED]

Comment: [REDACTED]

Completion Information

Find | View All First 2 of 2 Last

Milestone: MR FINORAL MR Final Comprehensive Exam

Term Required: [REDACTED]

Date Required: [REDACTED]

Anticipated Term: [REDACTED]

Anticipated Date: [REDACTED]

Milestone Complete: Not Completed Attempts Allowed: 2

Step 1

In the **Completion Information** section of the **Advisors/Completion Info** tab, enter the new scheduled exam date (if known) in the Anticipated Date field. If the scheduled date is not known, milestones will not be updated for a Masters Request to Schedule a 2nd attempt and the record of the second attempt will be added upon receipt of the 2nd attempt exam report. Add any desired comments about this milestone on this tab.

Step 2

Save the Student Milestone Record.

Processing a Master Final Oral Exam Report

MASTERS UNCONDITIONAL PASS FIRST ATTEMPT

Objectives

This section provides steps to update Student Records Tile to reflect receipt of a Master final examination report for an unconditional pass on the first attempt, to record the results of the attempt and committee ETD early approval.

Reminder

Examination reports require update of the student's checklist, the student's milestone records, and possibly the student's Plan of Work.

Navigation

Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps

Checklist Management – Person / Checklist Management1

Checklist Management 1 Checklist Management 2

Bri [redacted] ID: 00015 [redacted]

Checklist Date Time: 01/09/2009 3:34:08PM

*Administrative Function: SPRG Student Program

*Academic Institution: NC State University

*Checklist Code: 1 GMR Masters Checklist

*Status: 2 Initiated Status Date: 01/09/2009

Due Date: 3 01/10/2009

Due Amount: Currency Code

Comments:

Step 1

Insure that the Checklist code is set to GMR (Masters Checklist) or GMROBM (Masters Mixed Option B Checklist). If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2

Insure that the due date is set to the student's time limit date from their plan of work.

Step 3

Enter any necessary comments related to processing the Master Final Oral Exam Report passed unconditionally on the first attempt. Leave previously entered comments about this checklist.

Page /Tab Steps

Checklist Management – Person / Checklist Management2

Checklist Management 1 Checklist Management 2

Bri [redacted] ID: 0001 [redacted]

Checklist Date Time: 01/09/2009 3:34:08PM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 01/09/2009

Checklist Code: Masters Checklist Due Date: 01/10/2009

Checklist Item Table

*Sequence	*Item	*Status	*Status Date	*Due Date
600	GRPFIN RptFinExam	Received	03/30/2009	03/30/2009

1 Responsible ID: 000007501 2 Name: Harris, Anita Hope

Step 1

In the Checklist Item Table locate the item **GRPFIN (RptFinExam)**.

Step 2

Once the Unconditional Pass First Attempt exam report has been processed set the status to *received* and enter the status date. Save the checklist

Objective

Advisory committee members may choose to select “Thesis Early Approval” on the Exam Report. This selection is the committee member’s final approval of the ETD and they will not need to further review the ETD.

Navigation

Student Information Systems > Student Records Tile> Graduate Plan of Work

Page /Tab Steps

Committee

Committee Signatures/Date

Yoder, Jeffrey A.	Co-Chair	_____	
Nascone-Yoder, Nanette M	Co-Chair	_____	
Law, Jerry M	Member	_____	<input type="checkbox"/> Thesis Early Approval
Deiters, Alexander	Member	_____	<input type="checkbox"/> Thesis Early Approval

On the Exam Report, the Thesis Early Approval box is checked

Committee Members					Customize	Find	First	1 of 5	Last
Type	Member Name	Program Represented	Grad Faculty Status	Accept	1	2	3	4	5
1 Chair	Hien Tran	Applied Mathematics	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 Co-Chair	Harvey Banks	Applied Mathematics	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 Member	Stephen Campbell	Applied Mathematics	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4 Member	James Selgrade	Applied Mathematics	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5 Member	Helen Kraus	Horticultural Science	Associate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save

1. Check the box on the appropriate committee member row in the Approve ETD column.

2. Click the Save button.

Navigation

Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page /Tab Steps

Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Student Milestones | **Advisors/Completion Info** | Milestone Attempts

0001

Institution: NC State University Acad Prog: Public History Career: Graduate

Find | View All First 1 of 2 Last

*Effective Date: 01/13/2009 Milestone Copy

Milestone Detail Find | View All First 2 of 2 Last

*Milestone Nbr: 20 *Milestone: MR FINORAL

Academic Plan: 16PHMA Public History-MA

Description: MR Final Comprehensive Exam

Formal Description: Masters Final Comprehensive Examination

Milestone Level: Attempts Allowed: 2

Milestone Title:

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retro-actively date rows as long as the effective date used is after the effective date of the previous row.

Step 2 In the **Milestone Detail** section scroll to the **MR FINORAL Masters Final Comprehensive Examination** Milestone.

Page /Tab Steps Student Milestones – Milestone Attempts

Milestone: MR FINORAL MR Final Comprehensive Exam

Find | View All First 1 of 1 Last

Attempt Nbr: 1

How Attempted: Exam Taken

Date Attempted: 12/10/2008

Grading Scheme:

Grading Basis:

*Milestone Complete: Pass Unconditional

Grade Input:

Course ID:

Term:

Reported Flag:

Step 1 How Attempted = Exam Taken

Step 2 Date Attempted = Enter date exam taken.

Step 3 Milestone Complete = Pass Unconditional

Step 4 Save the student milestone record.

MASTERS**CONDITIONAL PASS****FIRST ATTEMPT***Objectives*

This section provides steps to update Student Records Tile to reflect receipt of a Master final examination report for an conditional pass on the first attempt and to record the results of the attempt

Reminder

Examination reports require update of both the student's checklist and the student's milestone records.

Navigation

Checklist record maintenance: Student Information System Homepage> Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps

Checklist Management – Person / Checklist Management1

Step 1

Insure that the Checklist code is set to GMR (Masters Checklist) or GMROBM (Masters Mixed Option B Checklist). If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2

Insure that the due date is set to the student's time limit date from their plan of work.

Step 3

Enter any *conditions* related to processing the Master Final Oral Exam Report passed *conditionally* on the first attempt in the comments. Alternatively, these conditions may be entered on the student milestone record.

Page /Tab Steps

Checklist Management – Person / Checklist Management2

Step 1 In the Checklist Item Table locate the item **GRPFIN (RptFinExam)**.

Step 2 Once the *Conditional Pass First Attempt* exam report has been processed set the status to *received* and enter the status date. Save the checklist

Navigation Student Milestone record maintenance: Main Menu > Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page /Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless

another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the **Milestone Detail** section scroll to the **MR FINORAL Masters Final Comprehensive Examination** Milestone.

Page / Tab Steps

Student Milestones – Milestone Attempts

The screenshot shows a web form titled "Milestone: MR FINORAL MR Final Comprehensive Exam". It has a search bar with "Find | View All" and pagination "First 1 of 1 Last". The form fields are:

- Attempt Nbr: 1
- How Attempted: Exam Taken (circled in red, with callout 1)
- Date Attempted: 12/10/2008 (circled in red, with callout 2)
- Grading Scheme: (empty)
- Grading Basis: (empty)
- Milestone Complete: Pass Conditional (circled in red, with callout 3)
- Grade Input: (empty)
- Course ID: (empty)
- Term: (empty)
- Reported Flag: (empty)

Step 1

How Attempted = Exam Taken

Step 2

Date Attempted = Date exam taken

Step 3

Milestone Complete = Pass Conditional

Step 4

Save the student milestone record.

MASTERS FAILURE**FIRST ATTEMPT***Objectives*

This section provides steps to update Student Records Tile to reflect receipt of a Master final examination report for a failure on the first attempt and to record the results of the attempt

Reminder

Examination reports require update of both the student's checklist and the student's milestone records.

Navigation

Checklist record maintenance: Student Information System Homepage > Student Records > Checklists Folder > Checklist Management – Person

Page Steps

Checklist Management – Person / Checklist Management1

Checklist Management 1 Checklist Management 2

Bri [REDACTED] ID: 00015 [REDACTED]

Checklist Date Time: 01/09/2009 3:34:08PM Variable Data

*Administrative Function: SPRG Student Program

*Academic Institution: NC State University

*Checklist Code: 1 GMR Masters Checklist

*Status: 2 Initiated Status Date: 01/09/2009

Due Date: 01/10/2009 3

Due Amount: Currency Code

Comments:

Step 1 Insure that the Checklist code is set to GMR (Masters Checklist) or GMROBM (Masters Mixed Option B Checklist).

Step 2 Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments related to processing the Master Final Oral Exam Report *failed on the first attempt*.

Page / Tab Steps Checklist Management – Person / Checklist Management2

Checklist Management 1 Checklist Management 2

Bri [REDACTED] ID: 0001 [REDACTED]

Checklist Date Time: 01/09/2009 3:34:08PM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 01/09/2009

Checklist Code: Masters Checklist Due Date: 01/10/2009

Checklist Item Table

*Sequence	*Item	*Status	*Status Date	*Due Date
600	GRPFIN RptFinExam	Received	03/30/2009	03/30/2009

1 Responsible ID: 000007501 2 Name: Harris, Anita Hope

Step 1 In the Checklist Item Table locate the item **GRPFIN (RptFinExam)**.

Step 2 Once the *Failed First Attempt* exam report has been processed set the status to received and enter the status date. Save the checklist

Navigation Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page / Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may pre-date rows as long as the effective date used is after the effective date of the previous row.

Step 2 In the **Milestone Detail** section scroll to the **MR FINORAL Masters Final Comprehensive Examination** Milestone.

Page / Tab Steps Student Milestones – Milestone Attempts

- Step 1* How Attempted = Exam Taken
- Step 2* Date Attempted = Date exam taken
- Step 3* Milestone Complete = Failed
- Step 4* Save the student milestone record.

MASTERS UNCONDITIONAL PASS SECOND ATTEMPT

- Objectives* This section provides steps to update Student Records Tile to reflect receipt of a Master final examination report for an unconditional pass on the *second* attempt and to record the results of the attempt
- Reminder* Examination reports require update of both the student's checklist and the student's milestone records.
- Navigation* Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person
- Page Steps* Checklist Management – Person / Checklist Management1

Checklist Management 1 Checklist Management 2

Brian [redacted] ID: 00015 [redacted]

Checklist Date Time: 01/09/2009 3:34:08PM Variable Data

*Administrative Function: SPRG Student Program

*Academic Institution: NC State University

*Checklist Code: 1 GMR Masters Checklist

*Status: 2 Initiated Status Date: 01/09/2009

Due Date: 3 01/10/2009

Due Amount: Currency Code

Comments:

- Step 1* Insure that the Checklist code is set to GMR (Masters Checklist) or GMROBM (Masters Mixed Option B Checklist).
- Step 2* Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments related to processing the Master Final Oral Exam Report passed unconditionally on the second attempt.

Page / Tab Steps Checklist Management – Person / Checklist Management2

The screenshots illustrate the process of adding a new checklist item in the 'Checklist Management 2' tab. The interface shows a 'Checklist Item Table' with columns for *Sequence, *Item, *Status, *Status Date, and *Due Date. The first screenshot shows an existing item with Sequence 600, Item GRPFIN, Status Received, Status Date 03/30/2009, and Due Date 03/30/2009. The second screenshot shows the same item with Status Completed and Status Date 10/21/2008. The third screenshot shows a new item being added with Sequence 800, Item GRPFIN, Status Initiated, Status Date 01/09/2009, and Due Date 01/09/2009. A callout bubble indicates: 'The new item looks like this when you click the +'. The fourth screenshot shows the new item with Sequence 610, Item GRPFIN, Status Received, Status Date 03/30/2009, and Due Date 03/30/2009. A callout bubble indicates: 'The second attempt request checklist item looks like this when you finish'.

Step 1 In the Checklist Item Table locate the item **GRPFIN (RptFinExam)**. This is the item for the exam report from the first attempt.

Step 2 Once the Unconditional Pass Second Attempt exam report has been processed add a new **GRPFIN RptfinExam** item to the list immediately below the first exam report. Increment the Sequence number by 10. This way the two requests will stay together on the list. Enter your Emplid. Set the status to *received* and enter the status date. Save the checklist.

Navigation Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page / Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may pre-date rows as long as the effective date used is after the effective date of the previous row.

Step 2 In the **Milestone Detail** section scroll to the **MR FINORAL Masters Final Comprehensive Examination** Milestone.

Page / Tab Steps Student Milestones – Milestone Attempts

Effective Date: 01/14/2009

Milestone: MR FINORAL MR Final Comprehensive Exam

Attempt Nbr: 2

How Attempted: Exam Taken

Date Attempted: 12/19/2008

Grading Scheme:

Grading Basis:

Milestone Complete: Pass Unconditional

Grade Input:

Course ID:

Term:

Reported Flag:

Step 1 Add a second attempt record to the milestone

Step 2 How Attempted = Exam Taken

Step 3 Date Attempted = Date exam taken

Step 4 Milestone Complete = Pass Unconditional

Step 5 Save the student milestone record.

MASTERS FAILURE SECOND ATTEMPT

Objectives This section provides steps to update Student Records Tile to reflect receipt of a Master final examination report for a failure on the second attempt and to record the results of the attempt

Reminder Examination reports require update of both the student's checklist and the student's milestone records.

Navigation Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps Checklist Management – Person / Checklist Management1

Checklist Management 1 Checklist Management 2

Bri [REDACTED] ID: 00015 [REDACTED]

Checklist Date Time: 01/09/2009 3:34:08PM Variable Data

*Administrative Function: SPRG Student Program

*Academic Institution: NC State University

*Checklist Code: 1 GMR Masters Checklist

*Status: 2 Initiated Status Date: 01/09/2009

Due Date: 3 01/10/2009

Due Amount: Currency Code

Comments:

Step 1 Insure that the Checklist code is set to GMR (Masters Checklist) or GMROBM (Masters Mixed Option B Checklist).

Step 2 Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments related to processing the Master Final Oral Exam Report failed on the second attempt.

Page / Tab Steps Checklist Management – Person / Checklist Management2

Checklist Management 1 Checklist Management 2

Bri [REDACTED] ID: 0001 [REDACTED]

Checklist Date Time: 01/09/2009 3:34:08PM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 01/09/2009

Checklist Code: Masters Checklist Due Date: 01/10/2009

*Sequence	*Item	*Status	*Status Date	*Due Date
600	GRPFIN RptFinExam	Completed	10/21/2008	10/21/2008

Responsible ID: 000007001 Name: Thompson, Dorothy J.

The screenshots show a software interface for managing checklist items. The top screenshot displays a checklist item with the following details: Sequence 600, Item GRPFIN, RptFinExam, Status Completed, Status Date 10/21/2008, Due Date 10/21/2008, Responsible ID 000007001, and Name Thompson, Dorothy J. A callout bubble indicates that this is the appearance of a new item after clicking the '+' button. The bottom screenshot shows a similar checklist item but with Status Received, Status Date 03/30/2009, and Due Date 03/30/2009. A callout bubble indicates that this is the appearance of a second attempt request checklist item after finishing. Red circles highlight the 'Sequence', 'Item', 'Status', and 'Status Date' fields in both screenshots.

Step 1 In the Checklist Item Table locate the item **GRPFIN (RptFinExam)**.

Step 2 Once the Failed Second Attempt exam report has been processed add a new GRPFIN RptfinExam item to the list immediately below the first exam report. Increment the Sequence number by 10. Enter your Emplid. This way the two exam reports stay together on the list. Set the status to *received* and enter the status date. Save the checklist.

Navigation Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page / Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Student Milestones | Advisors/Completion Info | Milestone Attempts

Institution: NC State University | Acad Prog: Public History | Career: Graduate

Effective Date: 01/14/2009 | Milestone Copy

Milestone Detail | Find | View All | First 2 of 2 Last

Milestone Nbr: 20 | Milestone: MR FINORAL | Academic Plan: 16PHMA | Public History-MA

Description: MR Final Comprehensive Exam

Formal Description: Masters Final Comprehensive Examination

Milestone Level: | Attempts Allowed: 2

Milestone Title:

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2 In the **Milestone Detail** section scroll to the **MR FINORAL Masters Final Comprehensive Examination** Milestone.

Page / Tab Steps Student Milestones – Milestone Attempts

Student Milestones | Advisors/Completion Info | Milestone Attempts

Institution: NC State University | Acad Prog: Public History | Career: Graduate

Effective Date: 01/14/2009

Milestone: MR FINORAL | MR Final Comprehensive Exam

Attempt Nbr: 2 | How Attempted: Exam Taken | Date Attempted: 12/19/2008

Grading Scheme: | Grading Basis: | Milestone Complete: Fail | Grade Input: | Course ID: | Term: | Reported Flag:

Step 1 Add a second attempt record to the milestone

Step 2 How Attempted = Exam Taken

Step 3 Date Attempted = Date exam taken on field.

Step 4 Milestone Complete = Fail

Step 5 Save the student milestone record.

Processing a Request to Schedule Doctoral Oral Preliminary or Final Exam 1ST Attempt (Defense)

Objectives This process requires the update of the student's checklist and milestones.

Reminder After the request to schedule has been reviewed and approved, update the student checklist and then the student milestone record. Milestones appear by default on the unofficial transcript.

Navigation Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page/ Tab Name Checklist Management – Person / Checklist Management1

The screenshot shows the 'Checklist Management 2' tab in a web application. The form contains the following fields and values:

- Checklist Date Time:** 02/06/2009 10:07:33AM
- *Administrative Function:** SPRG (with a search icon)
- *Academic Institution:** NC State University (dropdown menu)
- *Checklist Code:** GDR (with a search icon) - Callout 1 points to this field.
- *Status:** Initiated (dropdown menu)
- Due Date:** 02/07/2009 (calendar icon) - Callout 2 points to this field.
- Due Amount:** (empty field)
- Comments:** (large text area) - Callout 3 points to this field.

Other visible elements include a 'Variable Data' button, a user ID '00[redacted]670', and a star icon.

Step 1 Insure that the Checklist code is set to **GDR (Doctoral Checklist)**. If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2 Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments related to processing the Request to Schedule the Prelim or Final.

Page / Tab Steps Checklist Management – Person / Checklist Management2

The screenshot shows the 'Checklist Management 2' tab. At the top, it displays student information: 'B. [redacted] ger' and 'ID: 000[redacted]670'. Below this, it shows the 'Checklist Date Time: 02/06/2009 10:07:33AM', 'Administrative Function: Student Program', 'Academic Institution: NC State University', and 'Checklist Code: Doctoral Checklist'. The 'Status' is 'Initiated' and the 'Status Date' is '02/06/2009'. The 'Due Date' is '06/01/2010'.

The 'Checklist Item Table' contains three items:

*Sequence	*Item	*Status	*Status Date	*Due Date
600	GPRESC (ReqDRPre)	Received	02/15/2009	02/29/2008
700	GPRERP (RptDRPrel)	Received	03/07/2008	03/07/2008
800	GDRFIN (DRReqSchF)	Received	02/15/2009	02/07/2009

Red circles and numbered callouts (1 and 2) highlight the following fields in the first and third rows:

- Callout 1 points to the 'Item' field (GPRESC and GDRFIN).
- Callout 2 points to the 'Status' field (Received).
- Callout 2 points to the 'Status Date' field (02/15/2009).

Step 1 In the Checklist Item Table locate the item **GPRESC (ReqDRPre)** OR **GDRFIN (DRReqSchF)**.

Step 2 Once the request has been processed set the status to *received* and enter the status date. Save the checklist.

Navigation Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page / Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

DR PREORAL Doctoral Preliminary Comprehensive Examination

DR FINORAL Doctoral Final Comprehensive Examination

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2 In the **Milestone Detail** section, scroll to the **DR PREORAL Doctoral Preliminary Comprehensive Examination** Milestone or the **DR FINORAL Doctoral Final Comprehensive Examination** milestone.

Page / Tab Steps Student Milestones – Advisors/Completion Info

The screenshot shows the 'Advisors/Completion Info' tab in the SIS system. The 'Completion Information' section is highlighted with a red circle. It contains the following fields:

- Milestone: DR PREORAL
- Term Required: [Search Icon]
- Date Required: [Search Icon]
- Anticipated Term: [Search Icon]
- Anticipated Date: [Search Icon] (highlighted with a red circle and callout box '1')

Other fields visible include:

- Effective Date: 02/15/2009
- Institution: NC State University
- Acad Prog: Biological & Agri Engineering
- Career: Grad
- *Transcript Level: Unofficial
- *Print Milestone Detail: Always
- Advisor/Evaluator 1: [Search Icon]
- Advisor/Evaluator 2: [Search Icon]
- Comment: [Text Area]

Step 1

In the Completion Information section of the Advisers/Completion Info tab, enter scheduled exam date (if known) in the *Anticipated Date* field. Enter comments regarding the scheduled exam if necessary. Comments on the Advisers/Completion Info tab DO NOT appear on the transcript.

Step 2

Save the Student Milestone Record.

Processing a Request to Schedule Doctoral Oral Preliminary or Final Exam 2nd Attempt (Defense)

Objectives

This process requires the update of the student's checklist and milestones.

Reminder

After the request to schedule the 2nd attempt has been reviewed and approved, update the student checklist and then the student milestone record. Milestones appear by default on the unofficial transcript.

Page/ Tab Name Checklist Management – Person / Checklist Management1

Step 1 Insure that the Checklist code is set to GDR (Doctoral Checklist). If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2 Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments.

Page / Tab Steps Checklist Management – Person / Checklist Management2

2nd requests require the addition of another checklist item.

*Sequence	*Item	*Status	*Status Date	*Due Date
600	GPRESC	Received	02/15/2009	10/30/2006

The screenshots show a software interface for managing checklist items. The top screenshot displays a 'Received' status item with a callout indicating that this is the appearance after clicking the '+' button. The bottom screenshot displays a 'Received' status item with a callout indicating that this is the appearance of a 2nd attempt request checklist item after finishing. Both screenshots show fields for Sequence, Item, Status, Status Date, Due Date, Responsible ID, and Name.

Step 1

In the Checklist Item Table locate the item **GPRES (ReqDRPre)** OR **GDRFIN (DRReqSchF)** depending on the exam (prelim or final). These are the *received first request to schedule* items.

Step 2

Once the request to schedule the second attempt has been processed, add a new **GPRES ReqDRPre** item OR **GDRFIN (DRReqSchF)** item to the list immediately below the first request to schedule the prelim or the final. Increment the Sequence number by 10. This will insure that both requests to schedule will be listed together on the checklist for ease of future reference. Enter your Emplid. Set the status to *received* and enter the status date. Save the checklist.

Navigation

Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page /Tab Steps

Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1

Add a new effective dated row on the **Student Milestones** tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the **Milestone Detail** section scroll to the **DR PREORAL Doctoral Preliminary Comprehensive Examination Milestone** or the **DR FINORAL Doctoral Final Comprehensive Examination milestone**, depending on the circumstance.

Page / Tab Steps

Student Milestones – Advisors/Completion Info

Step 1

In the **Completion Information** section of the **Advisors/Completion Info** tab, enter the new scheduled exam date in the **Anticipated Date** field. Add any desired comments about this milestone on this tab.

Step 2 Save the Student Milestone Record.

Processing a Doctoral Prelim or Final Oral Exam Report

DOCTORAL UNCONDITIONAL PASS FIRST ATTEMPT

Objectives This section provides steps to update Student Records Tile to reflect receipt of a doctoral preliminary or final examination report for an unconditional pass on the first attempt, to record the results of the attempt, to record the results of the attempt and committee ETD early approval.

Reminder Examination reports require update of both the student's checklist and the student's milestone records and possibly the student's Plan of Work.

Navigation Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps Checklist Management – Person / Checklist Management1

Step 1 Insure that the Checklist code is set to GDR (Doctoral Checklist). If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2 Insure that the due date is set to the student's time limit date from their plan of work.

Step 3 Enter any necessary comments related to processing the Doctoral Prelim or Final Oral Exam Report passed unconditionally on the first attempt. Leave previously entered comments about this checklist.

Page /Tab Steps Checklist Management – Person / Checklist Management2

The screenshot shows the 'Checklist Management' interface. At the top, there are two tabs: 'Checklist Management 1' and 'Checklist Management 2'. Below the tabs, the user's name 'T.../u' and ID '000...391' are displayed. The main section contains the following information:

Checklist Date Time:	02/06/2009 10:07:31AM	Status:	Initiated
Administrative Function:	Student Program	Status Date:	02/06/2009
Academic Institution:	NC State University	Due Date:	02/07/2009
Checklist Code:	Doctoral Checklist		

Below this information is a section titled 'Checklist Item Table'.

Prelim

The screenshot shows the 'Checklist Item Table' for the Prelim exam. The table has the following columns: *Sequence, *Item, *Status, *Status Date, and *Due Date. The first row contains the following data:

700	GPRERP RptDRPrel	Received	02/16/2009	01/01/2010
-----	------------------	----------	------------	------------

Below the table, there are two callouts: '1' pointing to the 'Responsible ID' field (000005511) and '2' pointing to the 'Name' field (Olive, Peggy E.).

Final

The screenshot shows the 'Checklist Item Table' for the Final exam. The table has the following columns: *Sequence, *Item, *Status, *Status Date, and *Due Date. The first row contains the following data:

900	GRPFIN RptFinExam	Received	02/16/2009	01/01/2010
-----	-------------------	----------	------------	------------

Below the table, there are two callouts: '1' pointing to the 'Responsible ID' field (000005511) and '2' pointing to the 'Name' field (Olive, Peggy E.).

Step 1 In the Checklist Item Table locate the item **GPRERP (RptDRPrel)** or **GRPFIN (RptFinExam)**.

Step 2 Once the Unconditional Pass First Attempt exam report has been processed set the status to *received* and enter the status date. Save the checklist.

Objective Advisory committee members may choose to select "Dissertation Early Approval" on the Exam Report. This selection is the committee member's final approval of the ETD and they will not need to further review the ETD.

Navigation Student Information System Homepage > Student Records Tile > Graduate Plan of Work

Page /Tab Steps Committee

Committee Signatures

Tran,Hien Trong	Chair	
Banks,Harvey Thomas	Co-Chair	
Selgrade,James Francis	Member	
Campbell,Stephen LaVern	Member	
Kraus,Helen Tyler	Grad School Rep	

☐ Dissertation Early Approval
☐ Dissertation Early Approval

On the Exam Report, the Dissertation Early Approval box is checked

Committee Members				Customize	Find	First	1 of 5	Last
Type	Member Name	Program Represented	Grad Faculty Status	Accept	Approve ETD	Deny ETD		
1 Chair	Hien Tran	Applied Mathematics	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2 Co-Chair	Harvey Banks	Applied Mathematics	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
3 Member	Stephen Campbell	Applied Mathematics	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
4 Member	James Selgrade	Applied Mathematics	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
5 Member	Helen Kraus	Horticultural Science	Associate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

1. Check the box on the appropriate committee member row in the Approve ETD column.
2. Click the Save button.

Navigation

Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page /Tab Steps

Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Student Milestones

Advisors/Completion Info Milestone Attempts

To: /u 00191

Institution: NC State University Acad Prog: Biomedical Engineering Career: Graduate

*Effective Date: 02/02/2009 Milestone Copy

Milestone Detail

*Milestone Nbr: 10 *Milestone: DR PREORAL

Academic Plan: 14BMJPHD Biomedical Engr - UNCCH-PHD

Description: DR Prelim Comprehensive Exam

Formal Description: Doctoral Preliminary Comprehensive Examination

Milestone Level: Attempts Allowed: 2

Milestone Title:

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2 In the **Milestone Detail** section scroll to the **DR PREORAL Doctoral Preliminary Comprehensive Examination** Milestone or the **DR FINORAL Doctoral Final Comprehensive Examination** milestone depending on the type of report.

Page /Tab Steps Student Milestones – Milestone Attempts

The screenshot shows the 'Milestone Attempts' tab in the 'Student Milestones' section. The form is for a student at NC State University, Biomedical Engineering program, Graduate career. The effective date is 02/03/2009. The milestone is 'DR FINORAL' (DR Final Comprehensive Exam). The form fields are as follows:

Field	Value
Attempt Nbr:	1
How Attempted:	Exam Taken
Date Attempted:	02/02/2009
Grading Scheme:	
Grading Basis:	
*Milestone Complete:	Pass Unconditional

Red circles and numbered callouts highlight the following fields:

- 1: How Attempted (Exam Taken)
- 2: Date Attempted (02/02/2009)
- 3: *Milestone Complete (Pass Unconditional)

Step 1 How Attempted = Exam Taken

Step 2 Date Attempted = Date exam taken

Step 3 Milestone Complete = Pass Unconditional.

Step 4 Save the student milestone record.

DOCTORAL CONDITIONAL PASS FIRST ATTEMPT

Objectives This section provides steps to update Student Records Tile to reflect receipt of a doctoral prelim or final examination report for an conditional pass on the first attempt and to record the results of the attempt

Reminder Examination reports require update of both the student's checklist and the student's milestone records.

Navigation

Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps

Checklist Management – Person / Checklist Management1

Checklist Management 1 Checklist Management 2

Tara Nash ID: 000112511

Checklist Date Time: 02/06/2009 10:07:31AM Variable Data

*Administrative Function: SPRG Student Program

*Academic Institution: NC State University

*Checklist Code: 1 GDR Doctoral Checklist

*Status: 2 Initiated Status Date: 02/06/2009

Due Date: 06/01/2009

Due Amount: Currency Code

Comments: 3

Save Return to Search Notify

Step 1

Insure that the Checklist code is set to GDR (Doctoral Checklist). If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2

Insure that the due date is set to the student's time limit date from their plan of work.

Step 3

Enter any *conditions* related to processing the **Doctoral Prelim or Final Oral Exam Report** passed *conditionally* on the first attempt in the comments. Alternatively, these conditions may be entered on the student milestone record.

Page /Tab Steps

Checklist Management – Person / Checklist Management2

Checklist Management 1 Checklist Management 2

Tara Nash ID: 000112511

Checklist Date Time: 02/06/2009 10:07:31AM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 02/06/2009

Checklist Code: Doctoral Checklist Due Date: 02/07/2009

Checklist Item Table

Prelim

Final

Step 1 In the Checklist Item Table locate the item **GPRERP (RptDRPrel)** or **GRPFIN (RptFinExam)**.

Step 2 Once the *Conditional Pass First Attempt* exam report has been processed set the status to *received* and enter the status date. Save the checklist

Navigation Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page /Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless

another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the **Milestone Detail** section scroll to the **DR PREORAL Doctoral Preliminary Comprehensive Examination** Milestone or the **DR FINORAL Doctoral Final Comprehensive Examination** milestone depending on the type of report.

Page /Tab Steps

Student Milestones – Milestone Attempts

Step 1

How Attempted = Exam Taken

Step 2

Date Attempted = Date exam taken

Step 3

Milestone Complete = Pass Conditional. Enter conditions in the comments field on the Advisors/Completion Info tab.

Step 4

Save the student milestone record.

**DOCTORAL FAILURE
FIRST ATTEMPT
(PRELIM OR FINAL)**

Objectives

This section provides steps to update Student Records Tile to reflect receipt of a doctoral prelim or final examination report for a failure on the first attempt and to record the results of the attempt

Reminder

Examination reports require update of both the student's checklist and the student's milestone records.

Navigation

Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps

Checklist Management – Person / Checklist Management1

Checklist Management 1 Checklist Management 2

Tara Nash ID: 000112511

Checklist Date Time: 02/06/2009 10:07:31AM Variable Data

*Administrative Function: SPRG Student Program

*Academic Institution: NC State University

*Checklist Code: 1 GDR Doctoral Checklist

*Status: 2 Initiated Status Date: 02/06/2009

Due Date: 06/01/2009

Due Amount: Currency Code

Comments: 3

Save Return to Search Notify

Step 1

Insure that the Checklist code is set to GDR (Doctoral Checklist). If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2

Insure that the due date is set to the student's time limit date from their plan of work.

Step 3

Enter any *comments* related to processing the **Doctoral Prelim or Final Oral Exam Report failed** on the first attempt in the comments. Alternatively, comments may be entered on the student milestone record.

Page /Tab Steps

Checklist Management – Person / Checklist Management2

Checklist Management 1 Checklist Management 2

Tara Nash ID: 000112511

Checklist Date Time: 02/06/2009 10:07:31AM

Administrative Function: Student Program Status: Initiated

Academic Institution: NC State University Status Date: 02/06/2009

Checklist Code: Doctoral Checklist Due Date: 02/07/2009

Checklist Item Table

Prelim

Final

Step 1 In the Checklist Item Table locate the item **GPRERP (RptDRPrel)** or **GRPFIN (RptFinExam)**.

Step 2 Once the *Failed 1st Attempt* exam report has been processed set the status to *received* and enter the status date. Save the checklist

Navigation Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page /Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless

another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the **Milestone Detail** section scroll to the **DR PREORAL Doctoral Preliminary Comprehensive Examination** Milestone or the **DR FINORAL Doctoral Final Comprehensive Examination** milestone depending on the type of report.

Page /Tab Steps

Student Milestones – Milestone Attempts

Step 1

How Attempted = Exam Taken

Step 2

Date Attempted = Date exam taken

Step 3

Milestone Complete = Fail. Enter conditions in the comments field on the Advisors/Completion Info tab.

Step 4

Save the student milestone record.

**DOCTORAL
UNCONDITIONAL
PASS SECOND
ATTEMPT (PRELIM
OR FINAL)**

Objectives

This section provides steps to update Student Records Tile to reflect receipt of a doctoral prelim or final examination report for an unconditional pass on the *second* attempt and to record the results of the attempt.

Reminder Examination reports require update of both the student’s checklist and the student’s milestone records.

Navigation Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

Page Steps Checklist Management – Person / Checklist Management1 tab

Step 1 Insure that the Checklist code is set to **GDR (Doctoral Checklist)**. If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).

Step 2 Insure that the due date is set to the student’s time limit date from their plan of work.

Step 3 Enter any *comments* related to processing the **Doctoral Prelim or Final Oral Exam Report passed unconditionally on the second attempt** in the comments. Alternatively, comments may be entered on the student milestone record on the advisor/completion info tab.

Page /Tab Steps Checklist Management – Person / Checklist Management2

Doctoral Prelim first attempt report checklist item

This screenshot shows the first attempt report checklist item form. The form has several fields: *Sequence (700), *Item (GPRERP), *Status (Received), *Status Date (02/16/2009), *Due Date (01/01/2010), Responsible ID (000005511), and Name (Olive, Peggy E.). Red circles highlight the *Item field and the *Status and *Status Date fields. A box labeled '1' points to the Responsible ID field, and a box labeled '2' points to the Name field.

Doctoral Final first attempt report checklist item

This screenshot shows the first attempt report checklist item form. The form has several fields: *Sequence (900), *Item (GRPFIN), *Status (Received), *Status Date (02/16/2009), *Due Date (01/01/2010), Responsible ID (000005511), and Name (Olive, Peggy E.). Red circles highlight the *Item field and the *Status and *Status Date fields. A box labeled '1' points to the Responsible ID field, and a box labeled '2' points to the Name field.

Adding a new checklist item for DR prelim second attempt report

This screenshot shows the second attempt report checklist item form. The form has several fields: *Sequence (700), *Item (GPRERP), *Status (Received), *Status Date (01/23/2007), *Due Date (01/23/2007), Responsible ID (000005511), and Name (Olive, Peggy E.). A callout box points to the + button next to the *Due Date field, stating: "The new checklist item looks like this when you click the +". Below this, a new row is shown with *Sequence (1200), *Item (), *Status (Initiated), *Status Date (02/06/2009), *Due Date (), Responsible ID (000108128), and Name (Kestelnik, Kristen Marie). Red circles highlight the *Item field and the *Status and *Status Date fields.

This screenshot shows the second attempt report checklist item form. The form has several fields: *Sequence (700), *Item (GPRERP), *Status (Received), *Status Date (01/23/2007), *Due Date (01/23/2007), Responsible ID (000005511), and Name (Olive, Peggy E.). A callout box points to the + button next to the *Due Date field, stating: "The 2nd attempt prelim report checklist item looks like this when you finish." Below this, a new row is shown with *Sequence (710), *Item (GPRERP), *Status (Received), *Status Date (02/17/2009), *Due Date (02/18/2009), Responsible ID (000005511), and Name (Olive, Peggy E.). Red circles highlight the *Item field and the *Status and *Status Date fields.

Adding a new checklist item for DR final second attempt report

Step 1 In the Checklist Item Table locate the item **GPRLRP (RptDRPrel)** OR **GRPFIN (RptFinExam)**. These are the items for the doctoral exam report from the first attempt.

Step 2 Once the Unconditional Pass Second Attempt exam report has been processed add a new **GPRLRP RptDRPrel** OR **GRPFIN RptfinExam** item to the list immediately below the first exam report. Increment the Sequence number by 10. This way the two requests will stay together on the list. Enter your Emplid. Set the status to *received* and enter the status date. Save the checklist.

Navigation Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page / Tab Steps Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1

Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may pre-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the **Milestone Detail** section scroll to the **DR PREORAL Doctoral Preliminary Comprehensive Examination** Milestone or the **DR FINORAL Doctoral Final Comprehensive Examination** milestone depending on the type of report.

Page / Tab Steps

Student Milestones – Milestone Attempts

Step 1

Add a second attempt record to the milestone

Step 2

How Attempted = Exam Taken

- Step 3* Date Attempted = Date exam taken
- Step 4* Milestone Complete = Pass Unconditional
- Step 5* Save the student milestone record.

DOCTORAL FAILURE SECOND ATTEMPT

- Objectives* This section provides steps to update Student Records Tile to reflect receipt of a doctoral prelim or final examination report for a failure on the second attempt and to record the results of the attempt
- Reminder* Examination reports require update of both the student's checklist and the student's milestone records.
- Navigation* Checklist record maintenance: Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person
- Page Steps* Checklist Management – Person / Checklist Management1 tab

- Step 1* Insure that the Checklist code is set to **GDR (Doctoral Checklist)**. If an incorrect checklist code is assigned, insure that you have selected the proper list. If the proper list is not available reference the section titled [Assigning graduate student checklists](#).
- Step 2* Insure that the due date is set to the student's time limit date from their plan of work.

Step 3

Enter any *comments* related to processing the **Doctoral Prelim or Final Oral Exam Report failed on the second attempt** in the comments. Alternatively, comments may be entered on the student milestone record on the advisor/completion info tab.

Page /Tab Steps

Checklist Management – Person / Checklist Management2

The screenshot shows the 'Checklist Management' interface. At the top, there are two tabs: 'Checklist Management 1' and 'Checklist Management 2'. Below the tabs, the user's name 'T.../u' and ID '000...391' are displayed. The main section contains the following information:

- Checklist Date Time: 02/06/2009 10:07:31AM
- Administrative Function: Student Program
- Academic Institution: NC State University
- Checklist Code: Doctoral Checklist
- Status: Initiated
- Status Date: 02/06/2009
- Due Date: 02/07/2009

At the bottom, there is a section titled 'Checklist Item Table'.

Doctoral Prelim first attempt report checklist item

The screenshot shows the 'Checklist Item Table' for the Doctoral Prelim first attempt report. The table has the following columns: *Sequence, *Item, *Status, *Status Date, and *Due Date. The first row contains the following data:

- *Sequence: 700
- *Item: GPRERP RptDRPrel
- *Status: Received
- *Status Date: 02/16/2009
- *Due Date: 01/01/2010

Below the table, there are two callouts:

- Callout 1: Responsible ID: 000005511
- Callout 2: Name: Olive, Peggy E.

Doctoral Final first attempt report checklist item

The screenshot shows the 'Checklist Item Table' for the Doctoral Final first attempt report. The table has the following columns: *Sequence, *Item, *Status, *Status Date, and *Due Date. The first row contains the following data:

- *Sequence: 900
- *Item: GRPFIN RptFinExam
- *Status: Received
- *Status Date: 02/16/2009
- *Due Date: 01/01/2010

Below the table, there are two callouts:

- Callout 1: Responsible ID: 000005511
- Callout 2: Name: Olive, Peggy E.

Adding a new checklist item for DR prelim second attempt report

The screenshot shows the 'Checklist Item Table' with a new checklist item being added. The table has the following columns: *Sequence, *Item, *Status, *Status Date, and *Due Date. The first row contains the following data:

- *Sequence: 700
- *Item: GPRERP RptDRPrel
- *Status: Received
- *Status Date: 01/23/2007
- *Due Date: 01/01/2010

Below the table, there are two callouts:

- Callout 1: Responsible ID: 000005511
- Callout 2: Name: Olive, Peggy E.

A second row is shown below the first row, with the following data:

- *Sequence: 1200
- *Item: [Empty]
- *Status: Initiated
- *Status Date: 02/06/2009
- *Due Date: [Empty]

Below the second row, there are two callouts:

- Callout 1: Responsible ID: 000108128
- Callout 2: Name: Kostelnik, Kristen Marie

A speech bubble points to the '+' button in the top right corner of the table, with the text: 'The new checklist item looks like this when you click the +'.

*Sequence	*Item	*Status	*Status Date	*Due Date
700	GPRERP RptDRPrel	Received	01/23/2007	
710	GPRERP RptDRPrel	Received	02/17/2009	02/18/2009

Adding a new checklist item for DR final second attempt report

*Sequence	*Item	*Status	*Status Date	*Due Date
900	GRPFIN RptFinExam	Initiated	02/06/2009	
1200	GRPFIN	Initiated	02/06/2009	

*Sequence	*Item	*Status	*Status Date	*Due Date
900	GRPFIN RptFinExam	Received	09/14/2007	02/07/2009
910	GRPFIN RptFinExam	Received	02/17/2009	02/18/2009

Step 1

In the Checklist Item Table locate the item **GPRERP (RptDRPrel)** OR **GRPFIN (RptFinExam)**. These are the items for the doctoral exam report from the first attempt.

Step 2

Once the Unconditional Pass Second Attempt exam report has been processed add a new **GPRERP RptDRPrel** OR **GRPFIN RptFinExam** item to the list immediately below the first exam report. Increment the Sequence number by 10. This way the two requests will stay together on the list. Enter your Emplid. Set the status to *received* and enter the status date. Save the checklist.

Navigation

Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page / Tab Steps

Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1

Add a new effective dated row on the **Student Milestones** tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may pre-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the **Milestone Detail** section scroll to the **DR PREORAL Doctoral Preliminary Comprehensive Examination** Milestone or the **DR FINORAL Doctoral Final Comprehensive Examination** milestone depending on the type of report.

Page / Tab Steps

Student Milestones – Milestone Attempts

- Step 1* Add a second attempt record to the milestone
- Step 2* How Attempted = Exam Taken
- Step 3* Date Attempted = Date exam taken
- Step 4* Milestone Complete = Fail
- Step 5* Save the student milestone record.

Satisfying Masters or Doctoral Final Exam Conditions

- Objectives* Graduate Records Officers may document the satisfaction of masters or doctoral final examination conditions on the student milestone record.
- Reminder* Satisfaction of conditions may be noted in conjunction with processing of examination reports or as a stand-alone update.
- Navigation* Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones
- Page Steps* Student Milestones – Student Milestones
- Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

The screenshot displays the 'Student Milestones' system interface. At the top, there are tabs for 'Student Milestones', 'Advisors/Completion Info', and 'Milestone Attempts'. Below the tabs, the institution is listed as 'NC State University', the academic program as 'Public History', and the career as 'Graduate'. A search bar with 'Find | View All' and a list of attempts (1, 2, 3) is visible. The 'Effective Date' is set to '01/14/2009'. A 'Milestone Copy' button is present. The 'Milestone Detail' section shows the following information:

- Milestone Nbr:** 20
- Milestone:** MR FINORAL
- Academic Plan:** 16PHMA
- Description:** MR Final Comprehensive Exam
- Formal Description:** Masters Final Comprehensive Examination
- Milestone Level:** [blank]
- Attempts Allowed:** 2
- Milestone Title:** [blank]

Navigation controls for the milestone list include 'First', '2 of 2', and 'Last' buttons. A red circle highlights the 'Milestone Copy' button, and another red circle highlights the 'Milestone Detail' section. A blue box with the number '1' is in the top right corner, and a blue box with the number '2' is in the bottom right corner.

Step 1 Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2 In the **Milestone Detail** section scroll to the **MR FINORAL Masters Final Comprehensive Examination** or the **DR FINORAL DR Final Comprehensive Exam** Milestone.

Page Steps Student Milestones – Advisor/Completion Info

The screenshot displays the 'Student Milestones – Advisor/Completion Info' form. At the top, three tabs are visible: 'Student Milestone', 'Advisors/Completion Info' (which is selected and circled in red), and 'Milestone Attempts'. Below the tabs, the form is divided into several sections. The 'Effective Date' is set to 02/04/2009. The 'Advisors' section includes fields for 'Milestone' (MR FINORAL), '*Transcript Level' (Unofficial), '*Print Milestone Detail' (Always), and a checkbox for 'Advised by Committee'. There are also fields for 'Advisor/Evaluator 1' and 'Advisor/Evaluator 2'. A 'Comment' field contains the text: 'The student passed conditionally on the first attempt. They satisfied the condition by taking another course.' This field is highlighted with a red box and the number '1'. Below the comment field is the 'Completion Information' section, which includes fields for 'Term Required', 'Date Required', 'Anticipated Term', and 'Anticipated Date'. The 'Milestone Complete' field is set to 'Pass Conditional' and is circled in red. The 'Attempts Allowed' field is set to '2'.

Step 1 Document the satisfaction of the condition in the Comment field in the Advisors section of the page. Comments on the Student Milestone Advisors / Completion Info tab do not print on the transcript.

Step 2 Save the student milestone record.

Processing Doctoral

Admission to Candidacy

Objectives

This section provides procedures for indicating doctoral student admission to candidacy upon successful completion of their preliminary examination.

Reminder

Admission to Candidacy is a student milestone for all PhD and EDD academic plans.

Navigation

Student Milestone record maintenance: Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page Steps

Student Milestones – Student Milestones

Insure that the milestones assigned are appropriate based on the student academic plan. If incorrect milestones are assigned, insure that you have selected the proper academic plan for the student. Students are often active in more than one academic plan and have a milestone record for each. If the student milestones are incorrect reference the section titled [Milestone Copy](#) in the [Graduate Records Supervision](#) section of this manual.

Step 1

Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the **Milestone Detail** section scroll to the **CANDIDACY Doctoral Admission to Candidacy** Milestone.

Page / Tab Steps

Student Milestones – Milestone Attempts

The screenshot displays the 'Milestone Attempts' tab in the SIS system. At the top, navigation tabs include 'Student Milestones', 'Advisors/Completion Info', and 'Milestone Attempts'. Below this, student information is shown: 'L. [redacted]land' with ID '000015792'. Institutional details include 'Institution: NC State University', 'Acad Prog: Chemical Engineering', and 'Career: Grad'. The 'Effective Date' is '02/03/2009'. The main section is for the 'CANDIDACY' milestone, specifically 'DR Admission to Candidacy'. It lists fields for 'Attempt Nbr' (1), 'How Attempted' (Exam Taken), 'Grading Scheme', 'Grading Basis', '*Milestone Complete' (Completed), and 'Grade Input'. Three red circles with numbered callouts are present: circle 1 around 'How Attempted', circle 2 around 'Date Attempted' (02/02/2009), and circle 3 around '*Milestone Complete'.

- Step 1* How Attempted = Exam Taken
- Step 2* Date Attempted = Date admitted to candidacy in field
- Step 3* Milestone Complete = Completed
- Step 4* Save the student milestone record.

Processing Required Doctoral Forms and Fee

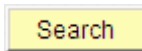
- Objectives* There are required forms and a fee for all doctoral students; these items are tracked through Checklists.
- Reminder* All checklist items are required for PhD students, and all except, the GRDSED – DR Survey of Earned Doctorate, are required for EDD students.
- Navigation* Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management – Person

INSERTING NEW CHECKLIST ITEMS

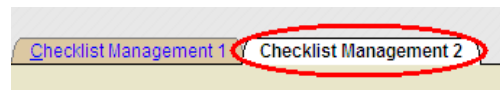
Step 1

1. Enter EmplID

2. Click



Step 2



Select the Checklist Management 2 Tab
scroll to the bottom of the page.

Step 3

1. Click the + to insert a new row.

2. The Sequence Number defaults, do not change

Step 4

3. Select the proper Item

- GDRCKM- DR Check/Money Order Microfilm
- GDRDAF – DR Dissertation Agreement Form
- GDRDPO – DR Dissertation Publishing Opt.
- GDRGAL – DR Graduation Attendance Ltr
- GDRSED – DR Survey of Earned Doctorate

4. Status = Received

5. Due Date = copy the due date from the Checklist Management 1 tab

6. Responsible ID = College liaison's ID replaces the current student ID

Step 5

Repeat instructions in Steps 3 & 4 to add each additional checklist item.



Follow instructions in Steps 3 & 4 described above.

UPDATE EXISTING CHECKLIST ITEMS



Graduate Student Program / Plan Record Maintenance

Admissions Actions on the Student Records Tile Program / Plan Stack

Objectives

This section provides procedures for updating student program plan records at the time of initial admission to the graduate career.

Reminder

Near the opening of enrollment cycle for a given academic term, admitted graduate career applicants are matriculated and activated in Student Records Tile. Upon matriculation the following fields on the application program data record are *grayed-out* or *locked* so they may not be updated through admissions (either directly on the maintain application page or through exported ApplyYourself records).

Admit Term	Academic Program
Academic Load (<i>Anticipated Registration</i>)	Program Action (<i>Decision</i>)
Program Action Reason (<i>Decision</i>)	Academic Plan
Sub-Plan	

After the opening of enrollment for any given academic term, newly admitted graduate career applicants are matriculated to Student Records Tile each night. Any changes in ApplyYourself to the fields listed in the table above must be updated through the Records and Enrollment Student

Program Plan page and/or the Term Activate a Student page. Once these values are changed on Student Records Tile they will no longer agree with admissions records in SIS.

The approximate schedule for matriculation of admitted applicants for each admit term is shown in the following table.

Admitted Applicant Matriculation		
Start	Stop	Admit Term
1-Mar	3-Sep	Summer -Fall
1-Oct	21-Jan	Spring

Actions of this type are always done first in ApplyYourself and the record exported to SIS to update it. HOWEVER, in cases where the student has been matriculated (made eligible to register) for the admit term on their application at the time they were matriculated, the exported record from AY will not update any of the SIS admissions fields listed in the table shown in the introduction to this section. The applicant's Student Records Tile program plan page will still show the information on the application at the time of matriculation.


A record of the ApplyYourself application attempting to update one of the locked application program fields will appear on the next morning's load report from SIS (*ncad_2012*). The message will read "AY application (2168782 / Sun) is active - no program stack changes to this record (000953083)". The desired change action must then be made directly in SIS by the College Liaison.

Reminder

Academic Plan and Program, Plan and/or Sub-Plan Changes For Matriculated Applicants

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

- Check 
- Enter student's name or EMPLID to locate his records
- Press SEARCH
- Select appropriate graduate student career number

Procedures

Do this action directly on the SIS records program plan page only if there is already a matriculation action for the admit term on the stack that references the proper SIS application number .

Page / Tab Steps

Student Program Tab:

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Academic Career: Graduate | Career Requirement Term | Student Career Nbr: 0

Status: Active in Program | Effective Date: 02/17/2009 | Effective Sequence: 3

*Program Action: **PLNC** (Plan Change) | Action Reason: **AMJC** (Adm - Change Major)

*Academic Institution: NCSU1 (NC State University) | *Academic Program: **NR** (Natural Resources) | *Admit Term: 2098 (Fall '09)

Requirement Term: 2098 (Fall '09) | Expected Grad Term: | *Campus: MAIN | Raleigh | *Acad Load: Full-Time

Buttons: Save, Return to Search, Notify, Refresh, Add, Update/Display, Include History

1. Click on + to add a new effective dated Row. The Effective Date defaults to the day you enter the action (today).
2. For Program Action, choose "PRGC" or "PLNC" as appropriate
3. For Action Reason, choose "AMJC" (Admitted-Change Major) - same reason for both actions.
4. For program changes select a new Academic Program.
5. The Admit Term will default from the original matriculation record.

Step 2

Then, on **Student Plan** tab that is associated with the new row you just created:

Student Program | **Student Plan** | Student Sub-Plan | Student Degrees

Academic Career: Graduate | Student Career Nbr: 0 | Car Req Term: | Find | View All | First | 1 of 1

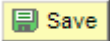
Status: Active in Program | Admit Term: Fall '09 | Effective Date: 02/17/2009 | Effective Sequence: 3

Program Action: Plan Change | Action Reason: Adm - Change Major | Action Date: 02/17/2009 | Requirement Term: Fall '09

*Academic Plan: **12NRDMS** (Nat Res-Landscape Arc-MS) | Major: | Degree: MS

*Plan Sequence: 1 | *Declare Date: 02/17/2009 | *Requirement Term: 2098 (Fall '09) | *Advisement: Include

Buttons: Save, Return to Search, Notify, Refresh, Add, Update/Display, Include History, Corr

1. Select an Academic Plan from the search results list. You will need to choose an academic plan for both program changes and plan changes. To reduce the number of choices in the menu, enter the College Number in the search field first. You may also sort the search results by clicking on any column heading.
2. Declare Date defaults to the effective date of the new record. Requirement Term defaults to the Admit Term.
3. Click 

NOTE: The Student Sub-Plan tab is used only if the plan has a concentration, track or option.

Discontinuation of Program (Matriculated Students Who Will Not Enter)

Reminder

This action is always done first in AY and the record exported to SIS to update it. HOWEVER, in cases where the student has been matriculated (made eligible to register) for the original term, the exported record from AY will create an entry on the edit report. The Will Not Enter action must then be made directly in SIS by the College Liaison.

There must be a matriculation action on the stack for the term in which the student will not enter, and the student CANNOT be enrolled in classes for the affected term.

Page Steps

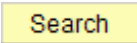
Before discontinuing the applicant, determine if they have already enrolled in classes for their admit term.

Navigation

Student Information System Homepage > Student Records Tile > Student Services Center > SEARCH > Academics Tab

Procedures

To check registration status,

1. Enter appropriate EmplID and click 
2. Choose the "Graduate" Career

Academic Institution	Academic Career
039 NCSU1	Graduate
039 NCSU1	NDS

3. Choose the term

Term Summary		edit	
<ul style="list-style-type: none"> NCSU1 - NC State University <ul style="list-style-type: none"> GRAD - Graduate <ul style="list-style-type: none"> 2098 - 2009 Fall Term 2097 - 2009 Summer Term 2 2096 - 2009 Summer Term 1 2091 - 2009 Spring Term 2088 - 2008 Fall Term NDS - Non Degree Status <ul style="list-style-type: none"> 2081 - 2008 Spring Term 		2009 Fall Term Eligible to Enroll: Yes Primary Program: LS Libera Academic Standing Status: Data i	
		Level / Load Academic Level - Projected: Gradu Academic Level - Term Start: Gradu Academic Level - Term End: Gradu Approved Academic Load: Full-Ti Academic Load: No Un	
		Classes No classes for this term.	

If the student is registered, do not proceed. Send a written request to Registration and Records to remove the student from classes.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

Enter student's name or EMPLID to locate his records

Check ☒ Include History

Click SEARCH

Select appropriate graduate career record

Step 1

On the Student Program tab:

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Academic Career: Graduate [Career Requirement Term](#) Student Career Nbr: 0

Find | View All First 1 of 3 Last

Status: Discontinued

*Effective Date: 01/01/2009

*Program Action: DISC Discontinuation

Action Reason: AWNE Adm - Will Not Enter

*Academic Institution: NCSU1 NC State University

*Academic Program: ARC Architecture

*Admit Term: 2091 Spring '09

Requirement Term: 2091 Spring '09

Expected Grad Term:

*Campus: MAIN Raleigh *Acad Load: Full-Time

Admissions

☐ From Application

Application Nbr:

Application Program Nbr: 0

Save Return to Search Notify Refresh Add Update/Display Include History

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Click on to Add a Row (Note, you must be on Row #1 when you add a new row)

Effective date defaults to the current date.

For Program Action, choose "DISC"

For Action Reason, choose "AWNE"

For Acad Program, leave the program on the default setting

For Admit Term, choose the same term for which the student was originally admitted

Click

Step 2

Leave the Student Plan Tab at the default settings

Newly Matriculated Students Being Denied Admission AFTER Previous Admit Action

Reminder

This action is always done first in AY and the record exported to SIS to update it. HOWEVER, in cases where the student has been matriculated (made eligible to register) for the original term, the exported record from AY will generate an entry on the edit report. The Will Not Enter action must then be made directly in SIS by the College Liaison.

There must be a matriculation action on the stack for the term in which the student is being subsequently denied admission, and the student CANNOT be enrolled in classes for the affected term.

Page Steps Before discontinuing the applicant, determine if they have already enrolled in classes for their admit term.

Navigation Student Information System Homepage > Student Records Tile > Student Services Center > SEARCH > Academics Tab

Procedures To check registration status,

4. Enter appropriate EmplID and click

Search

5. Choose the “Graduate” Career

Academic Institution	Academic Career
039 NCSU1	Graduate
039 NCSU1	NDS

6. Choose the term

Term Summary

edit

NCSU1 - NC State University

GRAD - Graduate

[2098 - 2009 Fall Term](#)

[2097 - 2009 Summer Term 2](#)

[2096 - 2009 Summer Term 1](#)

[2091 - 2009 Spring Term](#)

[2088 - 2008 Fall Term](#)

NDS - Non Degree Status

[2081 - 2008 Spring Term](#)

2009 Fall Term

Eligible to Enroll: Yes

Primary Program: LS Libera

Academic Standing Status: Data i

Level / Load

Academic Level - Projected: Gradu

Academic Level - Term Start: Gradu

Academic Level - Term End: Gradu

Approved Academic Load: Full-Ti

Academic Load: No Un

Classes

No classes for this term.

If the student is registered, do not proceed. Send a written request to Registration and Records to remove the student from classes.

Navigation Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures Enter student’s name or EMPLID to locate his records

Check

☒ Include History

Click SEARCH

Select appropriate graduate career record

Step 1 On the Student Program tab:

The screenshot shows the 'Student Program' form in the SIS system. The 'Student Program' tab is selected and circled in red. The form contains the following fields and values:

- Academic Career:** Graduate
- Career Requirement Term:** (link)
- Student Career Nbr:** 0
- Status:** Discontinued (Callout 2)
- Effective Date:** 04/15/2009 (Callout 2)
- Program Action:** DISC (Callout 3)
- Action Reason:** ADEN (Callout 4)
- Academic Institution:** NCSU1 (Callout 4)
- Academic Program:** ARC (Callout 5)
- Admit Term:** 2098 (Callout 6)
- Requirement Term:** 2098
- Expected Grad Term:** (Callout 7)
- Campus:** MAIN
- Acad Load:** Full-Time

On the right side, there is an 'Admissions' section with a 'From Application' checkbox, 'Application Nbr: 00037019', and 'Application Program Nbr: 0'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', 'Update/Display', and 'Include'. A pagination bar at the top right shows '1 of 6' with a '+' button (Callout 1).

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row)
2. Effective date defaults to the current date.
3. Program Action = DISC
4. Action Reason = ADEN
5. Academic Program - leave the program on the default setting
6. Admit Term - choose the same term for which the student was originally admitted
7. Click

Step 2

Leave the Student Plan Tab at the default settings.

Admitted Applicant Deferral to a Future Term

Reminder

This action is always done first in NextGen/ApplyYourself and the record exported to SIS to update it. HOWEVER, in cases where the attempt to change the requested admit term to a future one is made AFTER the student has been matriculated (made eligible to register) for the original admit term, the exported record from AY will not update admissions or the Student Records Tile admit term.

Navigation

Student Information System Homepage > Student Records Tile > Student Services Center > SEARCH > Academics Tab

Procedures

To check registration status,

1. Enter appropriate EmplID and click

2. Choose the “Graduate” Career

Academic Institution	Academic Career
039 NCSU1	Graduate
039 NCSU1	NDS

3. Choose the term

Term Summary		edit
NCSU1 - NC State University GRAD - Graduate <u>2098 - 2009 Fall Term</u> 2097 - 2009 Summer Term 2 2096 - 2009 Summer Term 1 2091 - 2009 Spring Term 2088 - 2008 Fall Term NDS - Non Degree Status 2081 - 2008 Spring Term		
2009 Fall Term Eligible to Enroll: Yes Primary Program: LS Libera Academic Standing Status: Data i		
Level / Load Academic Level - Projected: Gradu Academic Level - Term Start: Gradu Academic Level - Term End: Gradu Approved Academic Load: Full-Ti Academic Load: No Un		
Classes No classes for this term.		

NOTE: If the student is registered, email Registration and Records so they can drop all the courses from the Grad career. Once all courses have been dropped, proceed as follows.

Navigation

Student Information System Homepage> Student Records Tile > Student Term Information Folder > Term Activate a Student

Page Steps

Term Activate a Student – The student’s original term activation record must be removed.

Step 1

Enter appropriate EmplID and click

Step 2

Insure that the term record matches the original admit term for the admitted applicant. Delete the term record **1**

Step 3

Click 

Navigation

After the admitted applicant's original term record has been deleted: Student Information System Homepage> Student Records Tile > Career and Program Information Folder > Student Program / Plan.

Page / Tab Steps



Student Program / Plan – Student Program

Step 1

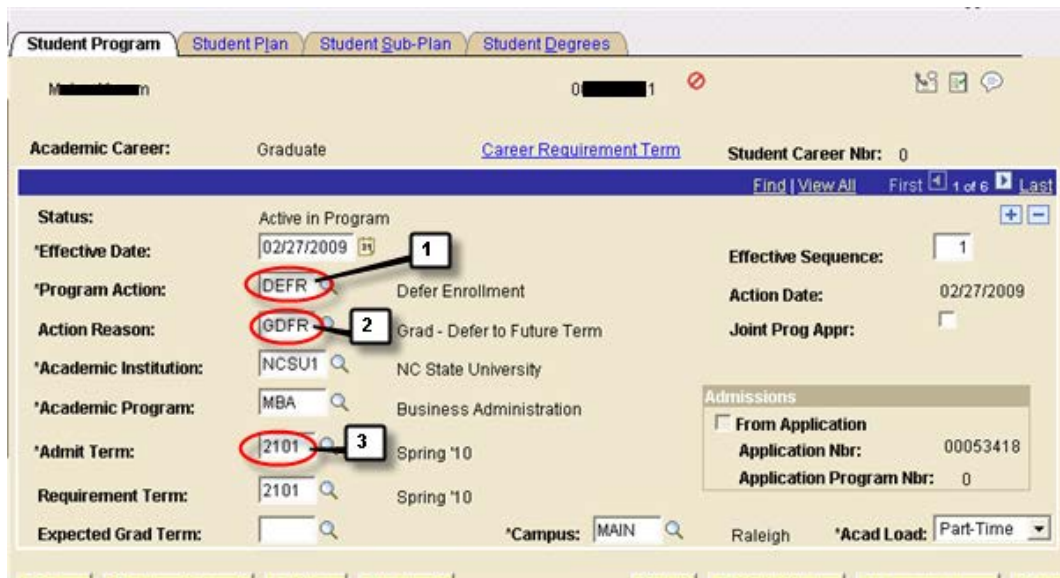
Insure that the Application Number in SIS matches the SIS Application number on the Internal Fields page in AY.

Step 2 Insure that the current program action and action reason are set to Matriculation Mass Change Admissions

Step 3 Insure that the admit term matches the admitted applicants original admit term.

Step 4 Click on  to Add a Row (Note, you must be on Row #1  when you add a new row)

Page / Tab Steps Student Program Plan – Student Program



The screenshot shows the 'Student Program' tab in a web application. The form contains the following fields and values:

- Academic Career:** Graduate
- Status:** Active in Program
- *Effective Date:** 02/27/2009
- *Program Action:** DEFR (Defer Enrollment) - Callout 1
- Action Reason:** GDFR (Grad - Defer to Future Term) - Callout 2
- *Academic Institution:** NCSU1 (NC State University)
- *Academic Program:** MBA (Business Administration)
- *Admit Term:** 2101 (Spring '10) - Callout 3
- Requirement Term:** 2101 (Spring '10)
- Expected Grad Term:** (empty)
- *Campus:** MAIN
- *Acad Load:** Part-Time
- Admissions:** From Application (checked), Application Nbr: 00053418, Application Program Nbr: 0

Step 1 Set the program action of the new row to DEFR Defer Enrollment

Step 2 Set the program action reason to GDFR Grad Defer to Future Term

Step 3 Set the Admit Term to the new future term

Step 4 Click 

Admitted Applicant Who Was Previously NDS Deferral to a Future Term

Reminder If the student has previously been NDS, contact the department to find out whether the student wants to remain NDS, or if their courses should be dropped.

*To keep NDS
courses*

1. Activate as NDS for term they are enrolled
2. Enroll in class as NDS
3. Email Registration and Records so they can drop all the courses from the Grad career
4. Delete graduate term record

To drop NDS
courses

5. Put deferral action on the program stack
1. Email Registration and Records so they can drop all the courses from the Grad career
2. Delete term from Term Activate page
3. Put deferral action on the program stack

Re-Matriculation of Applicants Previously Discontinued

Reminder

This action is always done first in AY and the record exported to SIS to update it. HOWEVER, in cases where the decision to change the requested entry term to an earlier one is made AFTER the student has been matriculated (made eligible to register) for the original term, the exported record from AY will generate an entry on the edit report. The change must then be made directly in SIS by the College Liaison.

Navigation

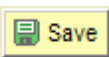
Student Information System Homepage> Student Records Tile > Career and Program Information Folder > Student Program / Plan.

Page Steps

- Check ☒ Include History
- Enter student's name or EMPLID to locate his records
- Press SEARCH
- Select appropriate graduate student career number

Student Program tab

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row)

2. Current date defaults; do not change unless necessary.
3. Program Action = MATR (Matriculation)
4. Action Reason = AAFT (Admission after Will Not Enter)
5. Academic Program = Leave default value unless change is required
6. Admit Term = Leave default value unless change is required.
7. Click 

Leave the Student Plan Tab at the default settings.

Matriculated Student Being Admitted to an Earlier Term


Reminder

This action is always done first in AY and the record exported to SIS to update it. HOWEVER, in cases where the decision to change the requested entry term to an earlier one is made AFTER the student has been matriculated (made eligible to register) for the original term, the exported record from AY will generate an entry on the edit report. The change must then be made directly in SIS by the College Liaison.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Page Steps

- Check  **Include History**
- Enter student's name or EMPLID to locate his records
- Press SEARCH
- Select appropriate graduate student career number

Step 1

On the Student Program Tab:

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row)
2. *Current date defaults; do not change unless necessary.*
3. *Program Action = DATA*
4. *Action Reason = ADET (Admit to Earlier Term)*
5. *Academic Program - leave as is, unless student is being admitted to a different program*
6. *Admit Term - choose the earlier term for which the program/plan is now effective*

Step 2

Click

Page Steps

Change Term Activation – The student's original admit term must be changed.

Navigation

Student Information System Homepage > Student Records Tile > Student Term Information Folder > Term Activate a Student

Step 1

Enter appropriate EmplID and click

Step 2

Term Activation

Academic Career: Graduate

*Academic Institution: NCSU1 NC State University

*Term: 2096 Sum1 '09 Semester

Student Career Nbr: 0 Aerospace Engineering

Override All Academic Levels: ☐

Override Projected Level: ☐

Academic Level - Projected: Graduate

Academic Level - Term Start: Graduate

Academic Level - Term End: Graduate

Level Determination: Default

Activation Date: 08/19/2009

Academic Year: 2009

Load Determination: Units

*Form of Study: Enrollment

Academic Load: No Units

*Billing Career: GRAD

Eligible To Enroll: ☒

Go to: [Calculate Tuition](#)

Insure that the term record matches the original admit term for the admitted applicant.

Change term record to earlier term. If the student is enrolled for the term you are attempting to change, you will receive a warning. Do not change the term record in this case; instead, add a new term activation record for the earlier admit term.

Step 3

Click 

Step 4

If “Residency” error is encountered, Effective Term of Residency may need to be changed as well.

Navigation

Student Information System Homepage > Admissions Tile > Application Entry Personal Info Folder > Residency

Residency Official 1

Academic Career: Graduate

Institution: NCSU1 NC State University

*Effective Term: 2096 2009 Summer Term 1

Residency: Out-of-state

Residence code: 185 1

PEOPLE'S REPUBLIC OF CHINA

Residency Date:


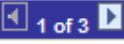
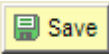
Additional Residency Data

Admissions: Out-of-state Admission Residency Exception:

Fin Aid Federal Residency: Out-of-state Fin Aid Fed Residency Excpt:

Fin Aid State Residency: Out-of-state Fin Aid State Residency Excpt:

Tuition: Out-of-state Tuition Residency Exception:

1. Click on  to Add a Row. (Note, you must be on Row #1  when you add a new row).
2. Change Effective Term to the new term.
3. Click .

When Residency is correct, repeat steps 1-4 to change the term activation term.

Students Admitted After the Beginning Of the Term

Objectives

This section deals with students who are admitted after the beginning of the term.

Reminder

In order to term activate an admitted applicant who has been matriculated to records requires the user to correct history in the records stack. You must back up his admission date to the term begin date and back up MATR date to the same date. If the admitted applicant is un-matriculated you may correct history on the admissions application program page to back the admit date (and any previous rows) to the term begin date. These actions require the Graduate Records Supervisor role

Change in Admission Status From Full to Provisional or Vice Versa After Matriculation

Objectives

This section shows how to make a change to a student's admission status after the student has been matriculated (made eligible to register).

Reminder

The admission status, Full or Conditional, is always on the row behind the Matriculation row.

Navigation

Student Information System Homepage> Student Records Tile > Career and Program Information Folder > Student Program/Plan



Step 1

Enter student's name or EMPLID to locate his records

Check 

Click SEARCH

Select appropriate graduate career record

1. Click on  to Add a new Effective Dated Row (Note, you must be on Row #1  when you add a new row).
2. Current date defaults; do not change unless necessary.
3. Program Action = DATA
4. Action Reason = GFTC for Full to Conditional and GCTF for Conditional to Full

Step 2

Click 

Actions On the Student Records Tile Program / Plan Stack for Active Students

Activate, Plan Change, and Program Change Actions

Query for Students With Program and Plan Changes

SIS_GRAD_PGM_PLAN_CHANGE

List of students who have any instances of a Program Change or Plan Change program action between beginning and end dates which are input by the query user.

Navigation

Student Information System Homepage > Reporting Tools Tile > Query Tools Folder > Query Viewer

See detailed instructions for running queries in Appendix, “Instructions for Running a Query”

Student Going on for Advanced Degree (MR-PhD)

This code is used when a student has graduated with a Master degree and has been approved by their program director to go on for a doctoral degree. (Change will ALWAYS be from MR to DR). This action reason is only appropriate when the student is remaining in the same program. This action reason is appropriate for plan changes only.

The request should be approved by DGP and should include (1) first semester of DR program, (2) whether the new program is a PhD or EdD and the new program (if different from MR) to which the student is changing. When this change is done for an international student (ADI), a notification is sent to the Office of International Services (OIS) at the time of the request so they can check and approve it. And when the request is approved by OIS and the Graduate School, and entered into SIS, a copy of the curriculum change form is also sent to OIS to confirm that the change has been made.

Navigation

Student Information System Homepage> Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

You must add a new student career number in SIS, in addition to entering information on the Student Program and Student Plan Tabs.

Enter student's name or EMPLID

Choose [Add a New Value](#) at the top of the screen or [Add a New Value](#) at the bottom of the screen.

Step 1

On the Add a New Value tab:


The screenshot shows the 'Student Program/Plan' form with the 'Add a New Value' tab selected. The form contains the following fields and controls:

- ID:** A text input field containing '000123456' with a search icon to its right.
- Academic Career:** A dropdown menu currently showing 'Graduate'.
- Student Career Nbr:** A text input field containing '1'.
- Add:** A yellow button located below the input fields.
- Navigation Links:** At the bottom, there are two links: 'Find an Existing Value' and 'Add a New Value'.

ID will default set from information you previously entered

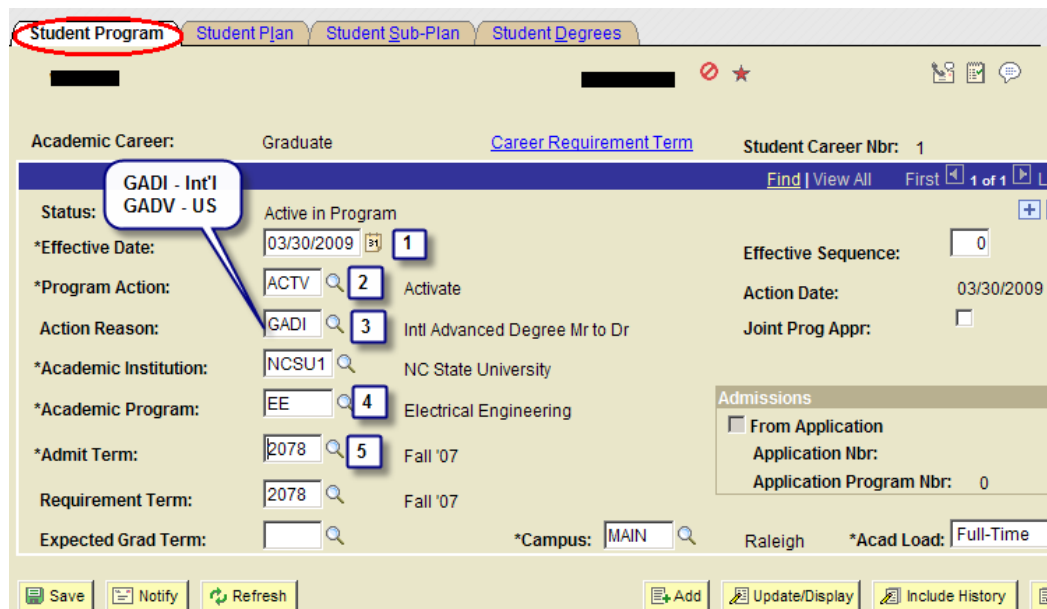
Academic Career = Graduate

Student Career Nbr - Enter "1" (or the next highest number from the default set number)

Click  to update

Step 2

On the Student Program tab:



1. Current date defaults; do not change unless necessary.
2. For Program Action, choose "ACTV" from menu
3. For Action Reason, choose "GADI" for int'l or "GADV" for domestic student from menu
4. For Academic Program, choose the new DR program from menu
5. For Admit Term, enter the term when the student is expected to start the new DR degree after graduating from the MR

Don't Save yet!

Step 3

Then, on Student Plan tab that is associated with that same program:

Student Program Student Plan Student Sub-Plan Student Degrees

Academic Career: Graduate Student Career Nbr: 1 Car Req Term:

Status: Active in Program Admit Term: Fall '07
 Effective Date: 03/30/2009 Effective Sequence: 0
 Program Action: Activate Action Date: 03/30/2009
 Action Reason: Intl Advanced Degree Mr to Dr Requirement Term: Fall '07
 Academic Program: G-Elec Eng

*Academic Plan: 14EEPHD Electrical Engineering-PHD Major
 *Plan Sequence: 10 Degree: PhD
 *Declare Date: 03/30/2009 Degree Checkout Stat:
 *Requirement Term: 2078 Fall '07 Student Degree Nbr:
 *Advisement Status: Include Completion Term:

For Academic Plan, choose new one from menu. You can enter the two-digit college number and then click the magnifying glass to limit the choices.

Click 

Second Master Degree (International)

This action is used when the student has earned a Master degree (or will earn it) and has been approved to go on for a second Master degree in another field. For example, student graduated from a MS in Physics and is approved to pursue a second MS in Statistics, after graduation.

The request should be approved by DGPs from both programs, and should include (1) first semester of new MR program/plan, (2) new MR degree student will be pursuing after graduation from first one. For international students, when the action is approved and entered into SIS, a notification is sent to the Office of International Services (OIS).


Navigation

Student Information System Homepage> Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

For this action, you must add a new student career number in SIS, in addition to entering information on the Student Program and Student Plan tabs.

Enter student's name or EMPLID

Choose  at the top of the screen or [Add a New Value](#) at the bottom of the screen.

Step 1

On the Add a New value tab:

Student Program/Plan

[Find an Existing Value](#) **Add a New Value**

ID: 000123456

Academic Career: Graduate

Student Career Nbr: 1


Add

[Find an Existing Value](#) | [Add a New Value](#)

ID will default set from information you previously entered

Academic Career = Graduate

Student Career Nbr - Enter "1" (or the next highest number from the default set number)

Click  to update.

Step 2

On the Student Program tab:

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Academic Career: Graduate | [Career Requirement Term](#) | Student Career Nbr: 1

Status: GMRI - Int'l | Active in Program

*Effective Date: 03/30/2009 | 1

*Program Action: ACTV | 2 | Activate

Action Reason: GMRD | 3 | Graduate 2nd Masters Degree US

*Academic Institution: NCSU1 | NC State University

*Academic Program: ANS | 4 | Animal Science

*Admit Term: 2088 | 5 | Fall '08

Requirement Term: 2088 | Fall '08

Expected Grad Term: |

*Campus: MAIN | Raleigh | *Acad Load: Full-Time

Admissions

☐ From Application

Application Nbr: 0

Application Program Nbr: 0

Save | Notify | Refresh | Add | Update/Display | Include History

1. Effective date defaults to current date. Do no change unless required.
2. Program Action - choose "ACTV" from menu
3. Action Reason - choose "GMRI" for int'l or "GMRD" for domestic student from menu
4. Academic Program - choose the new program from menu
5. Admit Term -, choose the term for which the new program/plan is effective

Don't Save yet!

Step 3

Then, on Student Plan tab that is associated with that same program:

Choose new Academic Plan from the menu. (To reduce the number of choices in the menu, enter the College Number in the search field first.)

Click 

NOTE: The Student Sub-Plan tab is used only if the new plan has a concentration, option or track.

Processing a Program and/or Plan Change (GCDI or GCDD) (Curriculum or Degree Changes) for an International or Domestic Student

This action is used when the student is currently enrolled in, but has not earned a graduate degree in his current program/plan but is changing to another plan within the same graduate program (or to another program administered by the same department) for example (1) from a Master-of (not completed) to a PhD; or (2) from a Master of Science in Computer Science to a Master of Science in Computer Networking; or (3) from a PhD back to a Master of in the same program (used when student fails prelims).

The request should be approved by the Director of Graduate Programs and should include (1) first semester of new program (2) new program/plan to which student is being changed. Upon approval by the Graduate School, the College Liaison will enter the action into SIS, and send an approval letter back to the DGP. For international students, the approval letter to the DGP has an added paragraph directing the student to contact the Office of International Services (OIS) to ensure that immigration status is not adversely affected. A copy of the approval letter is also sent by the College Liaison directly to OIS.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

Enter student's name or EMPLID

Click SEARCH

Select appropriate graduate career record

Step 1

On the Student Program tab:

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row).
2. Current date defaults; do not change unless necessary. If you want the actions to be effective on the transcript for the specified term, the effective dated row of both actions must be BEFORE CENSUS DAY for the effective term.
3. Program Action - "DISC"
4. Action Reason - "GCDI" for int'l or "GCDD" for domestic student from menu

Click

Click

Step 2

On the main search page, look at the number of "Graduate" careers and make a note of the highest number. When you add a value, you will want to increment up one from this number.

Student Program/Plan
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

EmplID: begins with 00 5

Academic Career: = Graduate

Student Career Nbr: =

Campus ID: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

☐ Include History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Result
View All

Note highest "Graduate" career number

EmplID	Academic Career	Student Career Nbr	Program Short Descr	Institution Short Descr	Name	Gender	Date of Birth
000 5	Graduate	0	G-FuncGen	NC State U		Male	09/25
000 5	Undergrad	1	U-PAMS	NC State U		Male	09/25
000 5	Undergrad	0	U-CALS	NC State U		Male	09/25

Choose the **Add a New Value** tab

Student Program/Plan

Find an Existing Value **Add a New Value**

ID: 00 5

Academic Career: Graduate

Student Career Nbr: 1

Add

Change number

Click

Add

On the Student Program tab

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Academic Career: Graduate [Career Requirement Term](#) Student [Find](#)

Status: Active in Program

*Effective Date: 07/13/2009 [31](#)

*Program Action: ACTV [1](#) Activate

Action Reason: GCDD [2](#) Grad Curr/Degree Change - US

*Academic Institution: NCSU1 [NC State University](#)

*Academic Program: AMA [3](#) Applied Mathematics

*Admit Term: 2098 [4](#) Fall '09

Requirement Term: 2098 [Fall '09](#)

Expected Grad Term: [Raleigh](#)

*Campus: MAIN [Raleigh](#)

[Save](#) [Notify](#) [Refresh](#)

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Degrees](#)

NOTE: Current date defaults; do not change unless necessary. If you want the actions to be effective on the transcript for the specified term, the effective dated row of both actions must be BEFORE CENSUS DAY for the effective term.

1. Program Action – “ACTV” defaults because you are creating a new career
2. Action Reason - “GCDI” for int’l or “GCDD” for domestic student from menu
3. Academic Program – Choose the new program from menu
4. Admit Term - choose the term for which the new program/plan is effective

Step 3

Then, on Student Plan tab that is associated with that same program:

1. Academic Plan - Choose new one from menu (To reduce the number of choices in the menu, enter the College Number in the search field first.)
2. Declare Date and Requirement Term will auto set with same info from Effective Date and Admit Term that you previously entered on the Student Program tab

Click

NOTE: The Student Sub-Plan tab is used only if the new plan has a concentration, option or track. You should only need to select the sub-plan name from the drop down menu and save it.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Curriculum Change

Procedures

Enter student's name or EMPLID

There are three options:

1. Add Plan

2. Change/Plan
3. Remove Plan

Student Curriculum Change

Academic Career: Graduate

Academic Program: PSY Psychology

Academic Plan: 16PSYPHD Psychology-PHD **Academic Plan Type:** Major

Academic Sub-Plan: 16PSYPSPDR Psychology in the Public Int

Academic Program: PSY Psychology

Academic Plan: 16PSYMS Psychology-MS **Academic Plan Type:** Major

Academic Sub-Plan: 16PSYSPMS Psychology in the Public Int


☒ Add Plan

☐ Change Plan/Subplan

☐ Remove Plan

GO!

Advisor Information

 Return to Search

Add Plan:

avorites | Main Menu > Student Information Systems > Records and Enrollment > Career and Program

Student Curriculum Change

Academic Career: Graduate

Academic Program: PSY Psychology

Academic Plan: 16PSYPHD Psychology-PHD **Academic Plan Type:** Major

Academic Sub-Plan: 16PSYPSPDR Psychology in the Public Int

Academic Program: PSY Psychology

Academic Plan: 16PSYMS Psychology-MS **Academic Plan Type:** Major

Academic Sub-Plan: 16PSYPSPMS Psychology in the Public Int

☒ Add Plan ☐ Change Plan/Subplan ☐ Remove Plan

1 2 GO!

Add Plan

3 **Plan Type** Major 4 GO!

5 **Academic Program:** AGE Agricultural & Extension Educ

6 ***Academic Plan:** 11AGEEDD Ag & Extension Ed-EDD 8

7 **Academic Sub-Plan:** 9

***Effective Term:** 2138 Fall '13

Action Reason:

Add Plan

Advisor Information

Return to Search

1. Select the Add Plan button
2. Click Go!
3. Select Plan Type
4. Click Go!
5. Select Academic Plan
6. Select Academic Sub-Plan
7. Select Effective Term
8. Select Action Reason
9. Click Add Plan

Change/Plan:

Student Curriculum Change

Academic Career: Graduate

Academic Program: PSY Psychology

Academic Plan: 16PSYPHD Psychology-PHD Academic Plan Type: Major

Academic Sub-Plan: 16PSYPSPDR Psychology in the Public Int

Academic Program: PSY Psychology

Academic Plan: 16PSYMS Psychology-MS Academic Plan Type: Major

Academic Sub-Plan: 16PSYPSPMS Psychology in the Public Int

☐ Add Plan
 ☒ **1** Change Plan/Subplan
 ☐ Remove Plan

2

Change Plan and/or subplan

From Curriculum

*Academic Program: **3**

*Academic Plan: **4**

Academic Sub-Plan: **5**

Requirement Term:

To Curriculum

Academic Program:

*Academic Plan: **6**

Academic Sub-Plan: **7**

*Effective Term: 2138 Fall '13 **8** Action Reason: **9** **10**

[Advisor Information](#)

1. Select Change Plan/Subplan
2. Click Go!
3. In the Change Plan and/or Subplan box, in the For Curriculum section:
Select Academic Program
4. Select Academic Plan
5. Select Academic Sub-Plan
6. In the Change Plan and/or Subplan box, in the To Curriculum section:
Select Academic Plan
7. Select Academic Sub-Plan
8. Select Effective Term
9. Select Action Reason

10. Click Change Plan

[orites](#) > [Main Menu](#) > [Student Information Systems](#) > [Records and Enrollment](#) > [Career and Pro](#)

Student Curriculum Change

Academic Career: Graduate

Academic Program: PSY Psychology

Academic Plan: 16PSYPHD Psychology-PHD **Academic Plan Type:** Major

Academic Sub-Plan: 16PSYPSPDR Psychology in the Public Int

Academic Program: PSY Psychology

Academic Plan: 16PSYMS Psychology-MS **Academic Plan Type:** Major

Academic Sub-Plan: 16PSYPSPMS Psychology in the Public Int

☐ Add Plan ☒ Change Plan/Subplan ☐ Remove Plan

Change Plan and/or subplan

From Curriculum	
Academic Program:	PSY Psychology
Academic Plan:	16PSYMS Psychology-MS
Academic Sub-Plan:	16PSYPSPMS Psychology in the Public Int
Requirement Term:	2138

To Curriculum	
Academic Program:	AGE Agricultural & Extension Educ
Academic Plan:	11AGEEDD Ag & Extension Ed-EDD
Academic Sub-Plan:	

Effective Term: 2138 Fall '13 **Action Reason:** Grad Curr/Degree Change - Intl

Successful Program Stack Modification

[Advisor Information](#)

Remove Plan:

Student Curriculum Change

Academic Career: Graduate

Academic Program: PSY Psychology

Academic Plan: 16PSYPHD Psychology-PHD **Academic Plan Type:** Major

Academic Sub-Plan: 16PSYPSPDR Psychology in the Public Int

Academic Program: AGE Agricultural & Extension Educ

Academic Plan: 11AGEEDD Ag & Extension Ed-EDD **Academic Plan Type:** Major

Academic Sub-Plan:

1

☐ Add Plan ☐ Change Plan/Subplan ☒ Remove Plan

GO! 2

Delete Plan

*Academic Program: 3

*Academic Plan: 4

Academic Sub-Plan: 5

*Effective Term: 2138 6 Fall '13

Action Reason: 7

8

Delete Plan

[Advisor Information](#)

[Return to Search](#)

1. Select Remove Plan
2. Click Go!
3. Select Academic Program
4. Select Academic Plan
5. Select Academic Sub-Plan
6. Select Effective Term
7. Select Action Reason
8. Click Delete Plan

Student Curriculum Change

Academic Career: Graduate

Academic Program: PSY Psychology

Academic Plan: 16PSYPHD Psychology-PHD **Academic Plan Type:** Major

Academic Sub-Plan: 16PSYPSPDR Psychology in the Public Int

Academic Program: AGE Agricultural & Extension Educ

Academic Plan: 11AGEEDD Ag & Extension Ed-EDD **Academic Plan Type:** Major

Academic Sub-Plan:

☐ Add Plan
 ☐ Change Plan/Subplan
 ☒ Remove Plan

GO!

Delete Plan

Academic Program: AGE Agricultural & Extension Educ

Academic Plan: 11AGEEDD Ag & Extension Ed-EDD

Academic Sub-Plan:

Effective Term: 2138 Fall '13 **Action Reason:** Graduate Transfer Delete Plan

Successful Program Stack Modification

[Advisor Information](#)

[Return to Search](#)

Navigation

Student Information System Homepage > Student Records Tile > Student Term Information Folder > Term Activate a Student

Step 1

Enter appropriate EmplID and click Search

Step 2

The screenshot shows the SIS Term Activation form. The 'Term Activation' tab is selected. The form displays the following information:

- Academic Career:** Graduate
- *Academic Institution:** NCSU1 (NC State University)
- *Term:** 2096 (Sum1 '09 Semester) - This field is circled in red.
- Student Career Nbr:** 0
- Override All Academic Levels:** ☐
- Override Projected Level:** ☐
- Academic Level - Projected:** Graduate
- Academic Level - Term Start:** Graduate
- Academic Level - Term End:** Graduate
- Level Determination:** Default
- Activation Date:** 08/19/2009
- Academic Year:** 2009
- Load Determination:** Units
- *Form of Study:** Enrollment
- Academic Load:** No Units
- *Billing Career:** GRAD
- Eligible To Enroll:** ☒

At the bottom, there is a 'Go to: Calculate Tuition' link.

Insure that the term record matches the semester that you want the student activated in the new career, AND, that it indicates the new career number that was just activated..

You will have to change the “Student Career Nbr” field from the old (discontinued) career number to the new (activated) career number.

Step 3

Click 

Lateral Transfer

This action is used when the student has NOT earned a graduate degree in his current degree program but is changing to another degree program/plan at the same level AND administered by a different department) for example (1) from a MS in Soil Science to a MS in Crop Science; or (2) a PhD in Food Science to a PhD in Animal/Poultry Science.

The request should be approved by the DGP and should include, (1) the name of the new program/plan to which the student is changing, (2) the effective term. For international students, a notification is sent to the International Student Office when the action is approved by the Graduate School and entered into SIS.

Note that there is no distinction made between an international student and a domestic student.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

Each time you enter a Program/Plan change, you must enter information on two tabs.

Enter student’s name or EMPLID

Click SEARCH

Select appropriate graduate career record

Step 1

On the Student Program tab:

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Academic Career: Graduate | Career Requirement Term | Student Career Nbr: 1

Status: Discontinued | Effective Date: 07/14/2009 | Program Action: DISC | Action Reason: GLAT | Academic Institution: NCSU1 | Academic Program: AMA | Admit Term: 2098 | Requirement Term: 2098 | Expected Grad Term: | Campus: MAIN | Raleigh | Acad Load: Full-Time

Effective Sequence: 1 | Action Date: 07/13/2009 | Joint Prog Appr: ☐

Admissions: ☐ From Application | Application Nbr: | Application Program Nbr: 0

Save | Notify | Refresh | Add | Update/Display

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row).
2. Current date defaults; do not change unless necessary.
3. Program Action - "DISC"
4. Action Reason - "GLAT"

Step 2

On the main search page, look at the number of "Graduate" careers and make a note of the highest number. When you add a value, you will want to increment up one from this number.

Student Program/Plan
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

EmplID: begins with 00 5

Academic Career: = Graduate

Student Career Nbr: =

Campus ID: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

☐ Include History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results View All

Note highest "Graduate" career number

EmplID	Academic Career	Student Career Nbr	Program Short Descr	Institution Short Descr	Name	Gender	Date Birth
000 5	Graduate	0	G-FuncGeno	NC State U		Male	09/25
000 5	Undergrad	1	U-PAMS	NC State U		Male	09/25
000 5	Undergrad	0	U-CALS	NC State U		Male	09/25

Choose the **Add a New Value** tab

Student Program/Plan

Find an Existing Value **Add a New Value**

ID: 00 5

Academic Career: Graduate

Student Career Nbr: 1

Add

Change number

Click

Add

On the Student Program tab

Academic Career: Graduate [Career Requirement Term](#) Student Career Nbr: 1

Status: Active in Program [Find | View All](#) First 1 of 3 Last

*Effective Date: 06/17/2011

*Program Action: ACTV 1

Action Reason: GLAT 2

*Academic Institution: NCSU1 3

*Academic Program: GB 4

*Admit Term: 2098

Requirement Term: 2098

Expected Grad Term: 2111

*Campus: MAIN

Effective Sequence: 1

Action Date: 06/17/2011

Joint Prog Appr: ☐

Admissions

☐ From Application

Application Nbr: 0

Application Program Nbr: 0

*Acad Load: Full-Time

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display Include History

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Degrees](#)

1. Program Action – “ACTV” defaults because you are creating a new career
2. Action Reason - “GLAT”
3. Academic Program – Choose the new program from menu
4. Requirement Term – Choose the current term.

Step 3

Then, on Student Plan tab that is associated with that same program:

Academic Career: Graduate Student Career Nbr: 2 Car Req Term: 2007 Fal

Status: Active in Program [Find | View All](#) First

Effective Date: 07/14/2009

Program Action: Activate

Action Reason: Graduate Lateral Transfer

Academic Program: G-Physics

Admit Term: Fall '09

Effective Sequence: 1

Action Date: 07/13/2009

Requirement Term: Fall '09

*Academic Plan: 17PYMS 1

*Plan Sequence: 10

*Declare Date: 07/14/2009 2

*Requirement Term: 2098

*Advisement Status: Include

Physics-MS

Major

Degree: MS

Degree Checkout Stat:

Student Degree Nbr:

Completion Term:

Save Notify Refresh Add Update/Display

1. Academic Plan - Choose new one from menu (To reduce the number of choices in the menu, enter the College Number in the search field first.)
2. Declare Date and Requirement Term will auto set with same info from Effective Date and Admit Term that you previously entered on the Student Program tab



NOTE: The Student Sub-Plan tab is used only if the new plan has a concentration, option or track. You should only need to select the sub-plan name from the drop down menu and save it.

Minor Plans

A minor is declared by adding an additional plan to an existing program. Minors are always designated at the PLAN level.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

You must enter information on two tabs.

Enter student's name or EMPLID

Click SEARCH

Select appropriate graduate career record

Step 1

On the Student Program tab:

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row).
2. Current date defaults; do not change unless necessary.
3. Program Action = PLNC
4. Action Reason = GMIN
5. Academic Program - Leave the Program as is (since you are adding a minor to an existing program).
6. Requirement Term - Choose the current term.

Don't Save yet!

Step 2

On the Student Plan tab

1. Click on to Add a Row (the is located on the bottom half of the screen that is already designating the degree plan):
2. Academic Plan - Choose the minor plan from menu (To reduce the number of choices in the menu, enter the College Number in the search field first.)
3. Declare Date and Requirement Term will auto set with same info from Effective Date and Admit Term previously entered on the Student Program tab

Click

As an added check to ensure accuracy, use the [View All](#) button to verify that you have a second plan row for the new Minor plan on the existing, active program (in addition to the first row designating the Major plan).

Co-Majors

This action is used when a co-major is being added. Student will receive a single diploma for the primary program, and the transcript will show a co-major in another program. When a Co-Major is added for an international student, prior approval from the Office of International Services (OIS) must be received. Request must also be approved by DGPs from both programs.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

For this action, you must add a new career number in SIS, in addition to entering information on the Student Program and Student Plan Tabs.

Enter student's name or EMPLID

Step 1

On the Add a New Value tab:

ID will default set from information you previously entered

For Academic Career, choose “Graduate” from menu

For Student Career No., enter “1” (or the next highest number from the default set number)

Press  to update

Step 2

On the Student Program tab:

1. Current date defaults; do not change unless necessary.
2. Program Action = ACTV
3. Action Reason = GCMJ
4. Academic Program - choose the co-major program from menu
5. Admit Term - enter the requested term in which the student starts the co-major

Don't Save yet!

Step 3

Then, on Student Plan tab

For Academic Plan, choose new one (always at same level as primary plan) from menu

Click 

Dual Degrees

This action is used when a student plans to complete all requirements for two separate degree programs and earn two diplomas. Request must be approved by DGPs from both programs. When a dual degree is added for an international student, prior approval from the Office of International Services (OIS) must be received. Registration and records must do a manual intervention to generate two separate diplomas and to record two separate degrees on the transcript.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Enter student's name or EMPLID to locate his records

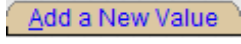
Press SEARCH

Scroll to bottom of screen and press, Add a New Value

Procedures

For this action, you must add a new career number in SIS, in addition to entering information on the Student Program and Student Plan Tabs.

Enter student's name or EMPLID

Choose  at the top of the screen or [Add a New Value](#) at the bottom of the screen.

Step 1

On the Add a New Value tab:

Student Program/Plan

[Find an Existing Value](#) **Add a New Value**

ID: 000123456

Academic Career: Graduate

Student Career Nbr: 1

Add

[Find an Existing Value](#) | [Add a New Value](#)

ID will default set from information you previously entered

Academic Career = Graduate

Student Career Nbr - Enter "1" (or the next highest number from the default set number)

Press **Add** to update

Step 2

On the Student Program tab:

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Academic Career: Graduate | [Career Requirement Term](#) | Student Career Nbr: 1

Status: Active in Program

*Effective Date: 1 03/31/2009

*Program Action: 2 ACTV Activate

Action Reason: 3 GDUD Grad Dual Degree

*Academic Institution: NCSU1 NC State University

*Academic Program: 4 AA Analytics

*Admit Term: 5 2091 Spring '09

Requirement Term: 2091 Spring '09

Expected Grad Term:

Effective Sequence: 0

Action Date: 03/31/2009

Joint Prog Appr:

Admissions

☐ From Application

Application Nbr:

Application Program Nbr: 0

*Campus: MAIN Raleigh

*Acad Load: Full-Time

Save **Notify** **Refresh** **Add** **Update/Display** **Include History**

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Degrees](#)

1. Current date defaults; do not change unless necessary.
2. Program Action = ACTV
3. Action Reason = GDUD (Graduate Dual Degree)

4. Academic Program - choose the new program from menu
5. Admit Term - enter the requested term when the student starts the second degree

Don't Save yet!

Step 3

Then, on Student Plan tab that is associated with that same program:

The screenshot shows the 'Student Plan' tab in the SIS system. The 'Academic Plan' field is highlighted with a red circle, showing a dropdown menu with the selected option '04GSGM' and a search icon. Other fields include 'Academic Career: Graduate', 'Student Career Nbr: 1', 'Car Req Term:', 'Status: Active in Program', 'Effective Date: 03/31/2009', 'Admit Term: Spring '09', 'Effective Sequence: 0', 'Program Action: Activate', 'Action Date: 03/31/2009', 'Action Reason: Grad Dual Degree', 'Requirement Term: Spring '09', 'Academic Program: G-Analytic', '*Plan Sequence: 10', '*Declare Date: 03/31/2009', '*Requirement Term: 2091 Spring '09', '*Advisement Status: Include', 'Degree: Women's & Gender Studies-GM Minor', 'Degree Checkout Stat:', 'Student Degree Nbr:', and 'Completion Term:'. At the bottom, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

For Academic Plan, choose new one (at same level as current plan) from menu

Click 

Transfers

This action is used on very rare occasions when the student has *NOT earned a graduate degree in his current degree program but is changing to another program/plan at a different level, administered by a different department*. For example (1) from a MS in Food Science to a PhD in Animal Science/Poultry Science, or a PhD in Soil Science to a MR in Crop Science, without having completed the first degree.

The request should be approved by the DGP and should include (1) first semester of new classification and/or major, (2) new degree to which the student is changing (if applicable), new major (college/curr) to which the student is changing (if applicable). For international students, when the action is approved and entered into SIS, a notification is sent to the Office of International Services (OIS).

NOTE: No distinction is made between a domestic student and an international student.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

Enter student's name or EMPLID



Click SEARCH

Select appropriate graduate career record

Each time you enter a Program/Plan change, you must enter information on two tabs.

Step 1

On the Student Program tab:

1. Click on  to Add a Row (Note, you must be on Row #1  when you add a new row).
2. Current date defaults; do not change unless necessary.
3. Program Action = PRGC
4. Action Reason = GTRF
5. Academic Program - choose the new program from menu
6. Requirement Term - Choose the effective term.

Don't save yet!

Step 2

Then, on Student Plan tab that is associated with that same program:

1. Academic Plan - Choose new one from menu (To reduce the number of choices in the menu, enter the College Number in the search field first.)
2. Declare Date and Requirement Term will auto set with same info from Effective Date and Admit Term that you previously entered on the Student Program tab

Click 

NOTE: The Student Sub-Plan tab *is used only if* the new plan has a concentration track or option.

Doctoral Students Pursuing 'En Route' Master

This action is used when a student plans to complete all requirements for a Master degree while still pursuing a doctoral degree in the same or a different field. Request must be approved by DGPs from both programs.

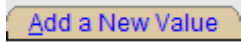
Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

For this action, you must add a new career number in SIS, in addition to entering information on the Student Program and Student Plan Tabs. Student must already be active in a doctoral program.

Enter student's name or EMPLID

Choose  at the top of the screen or [Add a New Value](#) at the bottom of the screen.

Step 1

On the Add a New Value tab:

Student Program/Plan

[Find an Existing Value](#) **Add a New Value**

ID: 000123456

Academic Career: Graduate

Student Career Nbr: 1

Add

[Find an Existing Value](#) | [Add a New Value](#)

ID will default set from information you previously entered

Academic Career = Graduate

Student Career Nbr - Enter "1" (or the next highest number from the default set number)

Click **Add** to update.

Step 2

On the Student Program tab:

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Academic Career: Graduate [Career Requirement Term](#) Student Career Nbr: 1

Status: Active in Program

*Effective Date: 1 03/31/2009

*Program Action: 2 ACTV Activate

Action Reason: 3 GMOR Grad Master On Route

*Academic Institution: NCSU1 NC State University

*Academic Program: 4 CBS Comparative Biomedical Sci

*Admit Term: 5 2088 Fall '08

Requirement Term: 2088 Fall '08

Expected Grad Term:

*Campus: MAIN Raleigh *Acad Load: Full-Time

Effective Sequence: 0

Action Date: 03/31/2009

Joint Prog Appr:

Admissions

☐ From Application

Application Nbr: 0

Application Program Nbr: 0

Save Notify Refresh Add Update/Display Include History

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Degrees](#)

1. Current date defaults; do not change unless necessary.
2. Program Action = ACTV
3. Action Reason = GMOR
4. Academic Program - choose the new program from menu
5. Admit Term - enter the term in which the student starts the second degree

Don't Save yet!

Step 3

Then, on Student Plan tab that is associated with that same program:

For Academic Plan, choose new one (at same level as current plan) from menu

Click 

Updating And Adding Student Milestones For Changes To the Student Program and Plan

Objectives

This section provides important information about keeping the proper milestones assigned to students who have changes made to their student program plan records.

Reminder

A *nightly process* runs that accomplishes two important functions:

1. Milestone templates are assigned to newly matriculated students based on their academic plan
2. New student milestone records are created for changes to the student's program and plan. Existing milestone records are left intact by this process.

When *any* PLNC change action is taken on the student program plan record for a given student career number, a new set of milestones is added to the student's milestone record for that

program, in addition to any other milestones that were already on that record. Each milestone is associated with a specific academic plan.

When a program change is performed on the student program plan record for a given student career number, a new milestone record will be created for the new program. The milestone record for the previous program will still remain.

When a new student career number is created in the same program as the previous graduate student career number (Master en route, advanced degree), a new set of milestones is added to the student's milestone record for that program, in addition to any other milestones that were already on that record. Each milestone is associated with a specific academic plan.

When a new student career number is added in a different program from the previous graduate student career number (co-major, 2nd Master degree, dual degree) a new milestone record will be created for the new program. The milestone record for the previous program will still remain.

Each academic program has only one milestone record, even if a student studies in various plans within that program. It is possible for an administrative user to intervene before the nightly process and update existing or add new milestone records themselves. The nightly process will not add academic plan milestones to a program milestone record where milestones for that plan are already on the record (whether added earlier by the nightly process or added manually by an administrative user).

Manually Updating Existing Program Milestone Records For Academic Plan Changes, Master “en route” and Advanced Degrees In the Same Program

Objectives

This section provides step-by-step procedures for manually updating existing program milestone records for academic plan changes, Master en route and advanced degree in the same program.

Reminder

There are two ways for administrative users to update existing milestone records. One is to add new milestones individually; the other is the “Copy Milestone” function which must be done by the Supervisor.

Adding New Milestones Individually

Page Steps

Student Milestones

Step 1

Add a new effective dated row on the Student Milestones tab. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row.

Step 2

In the **Milestone Detail** section click the plus to add a new milestone. Use the minus to remove unneeded milestones. *Do not delete milestone that have completion or attempt information entered.*

Page Steps

Student Milestones - Adding new Milestones

Step 1

The Milestone Nbr increments by 10 from the highest number already on the student milestone record.

Step 2

Click the Milestone search to select the new milestone.

Page Steps

Student Milestones – Look Up Milestone

Look Up Milestone

Academic Institution: NCSU1

Milestone: begins with

Description: begins with

[Basic Lookup](#)

Search Results

[View All](#) First Last

Milestone	Description
ACCTEACH	Accomplishment in Teach Prog
ADVDSPEC	Advanced Level Ed Specialist
BETAGAMMA	Beta Gamma Sigma
CANDIDACY	DR Admission to Candidacy
COOP	Co-op Work Experience
DR FINORAL	DR Final Comprehensive Exam
DR PREORAL	DR Prelim Comprehensive Exam

Step 1

Choose the appropriate milestone from the list. Choose milestones in the order you want them to appear on the milestone record.

Page Steps

Student Milestones – Academic Plan

Student Milestones [Advisors/Completion Info](#) [Milestone Attempts](#)

Michael Wallis 000014120

Institution: NC State University Acad Prog: Computer Science Career: Graduate

[Find | View All](#) [Fi](#)

*Effective Date: 02/03/2009

Milestone Detail

[Find | View All](#) [First](#)

*Milestone Nbr: 80 *Milestone: DR PREORAL

Academic Plan:

Description: DR Prelim Comprehensive Exam

Formal Description: Doctoral Preliminary Comprehensive Examination

Milestone Level: Attempts Allowed: 2

Milestone Title:

Step 1

Click the Academic Plan search to select the student's academic plan to associate the new milestone with.

Step 2

Click

Manually Adding A New Checklist For Academic Plan Changes, Master “en route” and Advanced Degrees In the Same Program

Objectives

This section provides important information about keeping the proper checklists assigned to students who have changes made to their student program plan records. Specifically, this section provides instructions on adding a new checklist to a student.

Navigation

Student Information System Homepage > Student Records Tile > Checklists Folder > Checklist Management-Person

Step 1

1. Enter student’s name or EmplID
2. Choose the “Add a New Value” tab

Checklist Management - Person
Enter any information you have and click Search. Leave fields blank for a

Find an Existing Value **Add a New Value** 2

ID: begins with 000123456 1

Sequence Number: =

Administrative Function: begins with

Checklist Code: begins with

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Step 2

Checklist Management - Person

Find an Existing Value **Add a New Value**

ID: 000123456

Add

Click **Add**

Step 3

Checklist Management 1 Checklist Management 2

ID: [Redacted]

Checklist Date Time: 02/06/2009 10:31:58 AM

*Administrative Function: 1 SPRG Student Program

*Academic Institution: NC State University

2 Variable Data

1. Select the Administrative Function SPRG
2. Retrieve Variable Data

Step 4

Variable Data


Academic Career: 1 GRAD Graduate

Student Career Nbr: 2 1

1. Choose career and
2. Career number.

Step 5

*Checklist Code: GMR Masters Checklist

Choose the correct checklist code. Use the  to search for appropriate values.

Click 

Discontinuation, Dismissal, Leave, Matriculation, and Withdrawal Actions

Terminate Without Prejudice

This action is used for an administrative withdrawal and implies that the student is in good academic standing at the time of the termination, and is eligible to return to Graduate School to finish if so desired. This action is the correct one if a student moves away, or becomes too ill to continue his program.

Action is initiated by the Director of Graduate Programs via a form letter request, and must be approved by a Graduate School Associate Dean. When the action is approved and entered into SIS by the College Liaison, a copy of the form is return to the DGP with the Graduate Associate Dean's approval signature added at the bottom.

Note: There is no distinction made between an international student and a domestic student.

Reminder

Users must notify the Registrar in writing with instructions for the disposition of any enrollments for the affected student if this action is to be effective during a term in which the student is enrolled in classes (*drop classes, move to NDS career, etc*).

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

Note that if student is active in more than one program, you must enter this action on all active grad student career numbers. You must enter the following information on the Student Program tab.

Enter student's name or EMPLID

Click SEARCH

Select appropriate graduate student career number

On the Student Program tab (be sure that Include History is pressed before continuing):

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row).
2. Current date defaults; do not change unless necessary.
3. Program Action = WADM
4. Action Reason = GPTO
5. Admit Term - choose the term for which the termination action is effective

Click

Navigation

Student Information System Homepage > Student Records Tile > Enroll Students Tile > Student Milestones


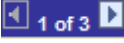
Procedures

Note that if student is active in more than one program, you must enter this action on all active grad student career numbers. You must enter the following information on the Student Program tab.

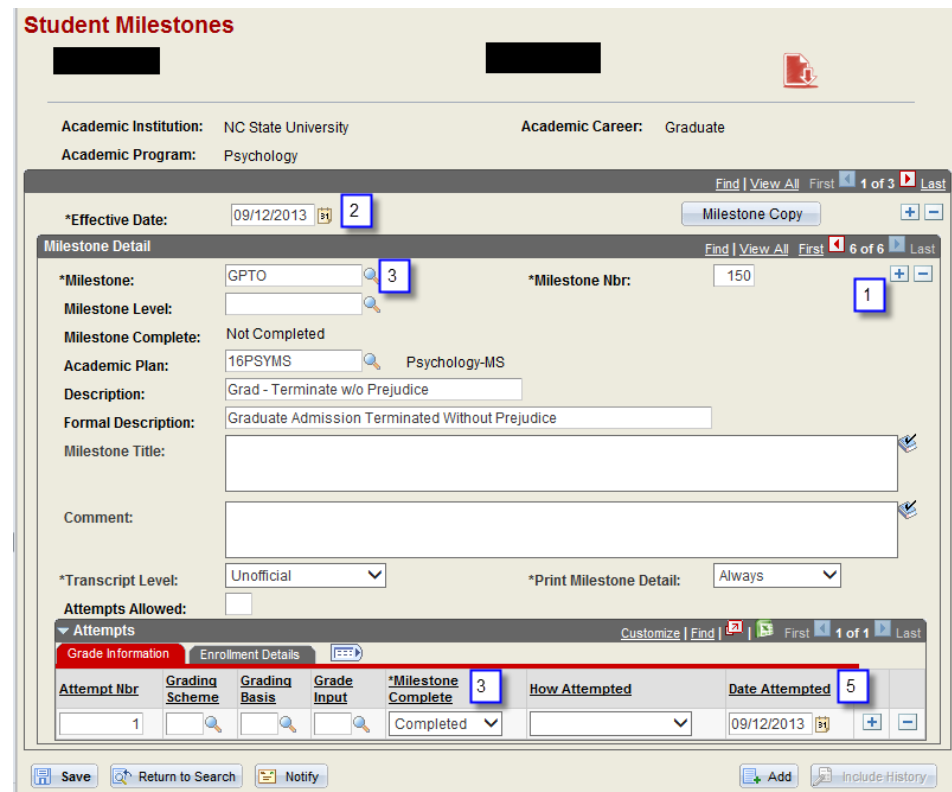
Enter student's name or EMPLID

Click SEARCH

Select appropriate graduate student career number

1. Click on  to Add a Row (Note, you must be on Row #1  when you add a new row).
2. Effective date defaults; do not change unless necessary.
3. Milestone = GPTO (Description and Formal Description automatically fill)
4. Milestone Complete- choose completed
5. Date Attempted- choose the date for which the termination action is effective

Click 



The screenshot shows the 'Student Milestones' form. At the top, it displays 'Academic Institution: NC State University' and 'Academic Career: Graduate'. Below this, the 'Academic Program' is set to 'Psychology'. The form is divided into several sections. The 'Effective Date' is set to '09/12/2013' with a callout '2'. The 'Milestone Detail' section includes fields for 'Milestone' (set to 'GPTO' with callout '3'), 'Milestone Level', 'Milestone Complete' (set to 'Not Completed'), 'Academic Plan' (set to '16PSYMS'), 'Description' (set to 'Grad - Terminate w/o Prejudice'), 'Formal Description' (set to 'Graduate Admission Terminated Without Prejudice'), 'Milestone Title', and 'Comment'. The 'Attempts' section shows a table with columns: 'Attempt Nbr', 'Grading Scheme', 'Grading Basis', 'Grade Input', '*Milestone Complete' (set to 'Completed' with callout '3'), 'How Attempted', and 'Date Attempted' (set to '09/12/2013' with callout '5'). The table has one row with 'Attempt Nbr' 1. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Include History'.

Termination of Program

This action is used when the student is being terminated for academic reasons, such as failure to maintain a 3.0 GPA, or failing the preliminary or final oral examination.

Action is initiated by the Director of Graduate Programs via a termination form request, and must be approved by a Graduate School Associate Dean. When the action is approved and entered into SIS by the College Liaison, the form is scanned to the student's electronic file.

Note that there is no distinction made between an international student and a domestic student.

Reminder

Users must notify the Registrar in writing with instructions for the disposition of any enrollments for the affected student if this action is to be effective during a term in which the student is enrolled in classes (*drop classes, move to NDS career, etc*).

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures


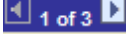
Note that if student is active in more than one program, then you must enter this action on all active programs. You must enter the following information on the Student Program tab.

Enter student's name or EMPLID

Click SEARCH

Select appropriate graduate student career number

On the Student Program tab (be sure that Include History is pressed before continuing):

1. Click on  to Add a Row (Note, you must be on Row #1  when you add a new row).
2. Current date defaults; do not change unless necessary.
3. Program Action = DISM
4. Action Reason = GPTW

5. Academic Program - choose the new program from menu
6. Admit Term - choose the term for which the new program/plan is effective

Click 

**Program
Termination for
Non-Compliance
With Continuous
Registration
Requirement**

This action is used for students who fail to register continuously for fall and spring semesters, and have not requested and received approval for a leave of absence.

Action is initiated by the Director of Graduate Programs via a form letter request, and must be approved by a Graduate School Associate Dean. When the action is approved and entered into SIS by the College Liaison, a copy of the form is returned to the DGP with the Graduate Associate Dean's approval signature added at the bottom.

Note: There is no distinction between an international student and a domestic student.

Reminder

Users must notify the Registrar in writing with instructions for the disposition of any enrollments for the affected student if this action is to be effective during a term in which the student is enrolled in classes (*drop classes, move to NDS career, etc*).

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures

Note that if student is active in more than one program, then you must enter this action on all active programs. You must enter the following information on the Student Program tab.

Enter student's name or EMPLID

Click SEARCH

Select appropriate graduate career record

On the Student Program tab (be sure that Include History is pressed before continuing):

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Academic Career: Graduate Career Requirement Term Student Career Nbr: 0

Status: Discontinued Effective Sequence: 1

*Effective Date: 03/31/2009

*Program Action: DISC Discontinuation

Action Reason: GTER Grad - Non-Comply Cont Reg

*Academic Institution: NCSU1 NC State University

*Academic Program: TMT Textiles

*Admit Term: 2088 Fall '08

Requirement Term: 2088 Fall '08

Expected Grad Term: *Campus: MAIN Raleigh *Acad Load: Full-Time

Admissions

☐ From Application

Application Nbr: 00037019

Application Program Nbr: 0

Save Return to Search Notify Refresh Add Update/Display Include History

Student Program | Student Plan | Student Sub-Plan | Student Degrees

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row).
2. Current date defaults; do not change unless necessary.
3. Program Action = DISC
4. Action Reason = GTER
5. Admit Term - choose the term for which the termination action is effective

Click

Reinstatement

This action is used when the student was terminated and is now approved to be reinstated (into the same program).

Action should have an Associate Dean's approval and a confirming letter is mailed to the DGP.

Note: There is no distinction made between an international student and a domestic student.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Procedures


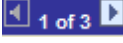
Be sure that Include History has been pressed, and student should have a termination action on the program stack.

Enter student's name or EMPLID to locate his records

Click SEARCH

Select appropriate graduate career record

On the Student Program tab:

1. Click on  to Add a Row (Note, you must be on Row #1  when you add a new row).
2. Current date defaults; do not change unless necessary.
3. Program Action = MATR
4. Action Reason = GRIN
5. Academic Program - leave the auto-populated information as is, since you are reinstating to the same program from which the student was previously terminated.
6. Admit Term - choose the term for which the reinstatement is effective (can be a current or future term)

Click 

Leave of Absence and Return From Leave

A student in good academic standing who must interrupt his/her graduate program for good reasons may request a leave of absence from graduate study for a definite period of time, not to exceed one year within a given graduate degree program. The student should initiate the request with the chair of his/her advisory committee and have it approved by his/her Director of Graduate Programs (DGP) before the DGP submits it to the Graduate School. The Graduate School should receive the request, in the form of a letter or e-mail from the DGP, at least one month prior to the first day of the term involved.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Reminder

Leaves of Absence in SIS require entry of a *Leave* action and a *Return From Leave* action.

FUTURE DATED LEAVE OF ABSENCE (LOA)

1. Future date the leave action to the start of the effective term, prior to Census.
2. At the same time, add another row with Return From Leave of Absence (RLOA) effective the start date of the next subsequent term (after Census) following the last term for which leave was requested.

Step 1

Enter student's name or EMPLID to locate his records

Press SEARCH

Select appropriate graduate career record

Step 2

On Student Program tab:

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row).
3. Future date the leave action to the start of the effective term.
2. Program Action = LEAV
3. Action Reason = GLOA
4. Admit Term - choose the first term for which Leave of Absence was approved.

Click

Step 3

To enter the *Return From Leave* action: On Student Program tab:

1. Click on to Add a Row (Note, you must be on Row #1 when you add a new row).
2. The effective date is the start date of the next term following the last term for which leave was requested.
3. Program Action = RLOA
4. Action Reason = GRLA
5. Admit Term – choose the next term following the last term for which leave was requested.

Click

Retro-Active Leave of Absence

Reminder

To enter a Leave of Absence, you must enter (1) the beginning date and (2) the date the student is expected to return in two separate steps in SIS.

IN-TERM OR RETROACTIVE LOA – A LOA for a given term when the current date is after the term's census date

1. If the student is still active, enter a LOA effective today.

NOTE: If the student is discontinued, you will first have to "Correct History" to remove the DISC row. See the Graduate Records Supervisor for this action.

2. At the same time, add another row with Return From Leave of Absence (RLOA) effective the start date of the next term following the last term for which leave was requested.

Thesis and Dissertation Record Management

Thesis and Dissertation Review

Objectives

This section provides step-by-step procedures for manually updating existing program milestone records for thesis and dissertation review.

Navigation

Student Information System Homepage> Student Records Tile > Enroll Students > Student Milestones

Page Steps

Enter student's name or EMPLID

Click SEARCH

Select appropriate milestone program record if more than one exists

Find an Existing Value [Add a New Value](#)

ID: begins with 000 [REDACTED]
 Academic Institution: = NCSU1
 Academic Career: =
 Academic Program: =
 Campus ID: begins with
 National ID: begins with
 Last Name: begins with
 First Name: begins with


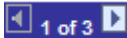
☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
[View All](#)

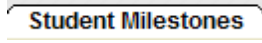
ID	Academic Institution	Academic Career	Academic Program	Name	Gender	Date Birth
00 [REDACTED]	NCSU1	GRAD	DDN	Allen, [REDACTED]	male	02/1
00 [REDACTED]	NCSU1	GRAD	GD	Allen, [REDACTED]	male	02/1

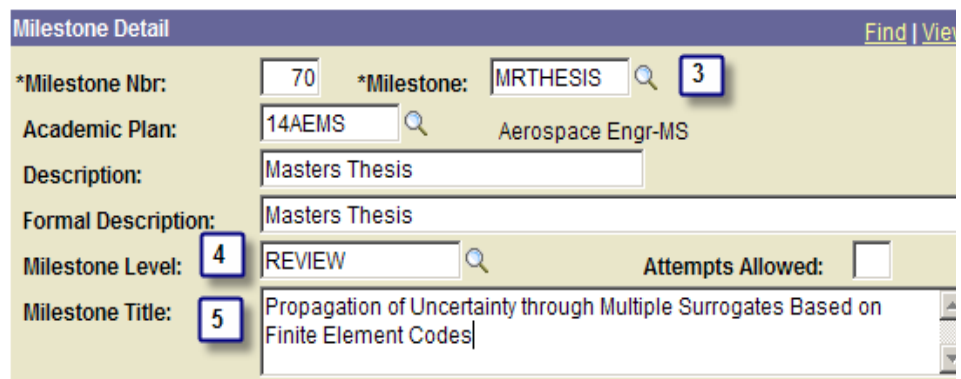
On the Student Milestones tab:

1. Click on  to Add a new Effective Dated Row (Note, you must be on Row #1  1 of 3 when you add a new row).





*Effective Date: 02/02/2009  Milestone Copy  

2. Current date defaults; do not change unless necessary. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row. If the Review and Acceptance are on the same date, retro-actively date the Review row to the day prior to the current date, and then enter the current effective date for the Acceptance Row. That way it will not delay appearance on the transcript.
3. On the Student Milestones tab, , find appropriate milestone: MRTHESES - Thesis OR DRDISSERTA - Dissertation.




Milestone Detail Find | View

*Milestone Nbr: *Milestone: 

Academic Plan:  Aerospace Engr-MS

Description:

Formal Description:

Milestone Level:  Attempts Allowed:

Milestone Title: Propagation of Uncertainty through Multiple Surrogates Based on Finite Element Codes

4. Milestone Level = Choose Reviewed
Enter official title (This will appear on unofficial transcript.)
5. Internal comments can be added on the Advisors/Completion Info tab.

6. On the Milestone Attempts tab:

How attempted = Submitted Work

Date attempted = Date Attempted

Milestone Complete = Completed

Click 

Thesis and Dissertation Acceptance

Objectives

This section provides step-by-step procedures for manually updating existing program milestone records for thesis and dissertation acceptance.

Navigation

Student Information System Homepage > Student Records Tile > Enroll Students Folder > Student Milestones

Page Steps

Enter student's name or EMPLID

Click SEARCH

Select appropriate milestone program record if more than one exists

Find an Existing Value [Add a New Value](#)

ID: begins with 000 [redacted]

Academic Institution: = NCSU1

Academic Career: =

Academic Program: =

Campus ID: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
View All

ID	Academic Institution	Academic Career	Academic Program	Name	Gender	Date Birth
00 [redacted]	NCSU1	GRAD	DDN	Allen, [redacted]	male	02/1
00 [redacted]	NCSU1	GRAD	GD	Allen, [redacted]	male	02/1

On the Student Milestone tab:

- Click on [+](#) to Add a new Effective Dated Row (Note, you must be on Row #1 [1 of 3](#) when you add a new row).

Find | View All First [1 of 1](#) Last

*Effective Date: [2](#) 02/02/2009 [BY](#) [Milestone Copy](#) [1](#) [+](#) [-](#)

- Current date defaults; do not change unless necessary. Milestones are allowed only one row per effective date. Once a record has been saved and closed, it may not be updated unless another row is added with a different effective date. Users may retroactively-date rows as long as the effective date used is after the effective date of the previous row. If the Review and Acceptance are on the same date, retroactively date the Review row to the day prior to the current date, and then enter the current effective date for the Acceptance Row. That way it will not delay appearance on the transcript.
- On the Student Milestones tab, [Student Milestones](#), find appropriate milestone: MRTHESIS - Thesis or DRDISSERTA – Dissertation

Milestone Detail [Find](#) | [View All](#)

*Milestone Nbr: 70 *Milestone: DRDISSERTA 3

Academic Plan: 14AEMS Aerospace Engr-MS

Description: Doctoral Dissertation

Formal Description: Doctoral Dissertation

Milestone Level: 4 ACCEPTANCE Attempts Allowed: ☐

Milestone Title: The Effects of Upstream Mass Injection by Vortex Generator Jets on Shock-Induced Turbulent Boundary Layer Separation

4. Milestone Level = Acceptance
5. Internal comments can be added on the Advisors/Completion Info tab.

[Student Milestones](#) **Advisors/Completion Info** [Milestone Attempts](#)

Institution: NC State University Acad Prog: Aerospace Engineering Career:

Effective Date: 04/02/2009

Advisors [Find](#) | [View All](#)

Milestone: DRDISSERTA Doctoral Dissertation

*Transcript Level: Unofficial *Print Milestone Detail: Always

☐ Advised by Committee

Advisor/Evaluator 1:

Advisor/Evaluator 2:

Comment:

6. On the Milestone Attempts tab:

[Find](#) | [View All](#)

Attempt Nbr: 1

How Attempted: Submitted Work Date Attempted: 03/21/2009

Grading Scheme:

Grading Basis:

*Milestone Complete: Completed

Grade Input:

How attempted = Submitted Work

Date attempted = Date Attempted

Milestone Complete = Completed



Graduation Clearance

Objectives

This section covers processing student's Applications for Graduation.

Reminder

Applications for Graduation replace Diploma Order Request cards. The application for graduation provides the means of building graduation listings and commencement bulletins. The Graduate School should start to receive summer applications toward the middle of the spring term. Some Spring grads don't quite make the spring graduation deadlines and they consequently become summer grads. When this happens, the students need to submit a new application for summer graduation.

In SIS, a student's name will not be included on a graduation list UNLESS there is an application on file for the specified term, whether submitted by the student themselves, entered by an academic department or entered in the Graduate School.

Graduation Queries

Reminder

Queries are run against the Reporting database which contains data from the previous day's work. This means that results are as of the close of business on the previous day, as opposed to current.

Navigation

Student Information System Homepage > Reporting Tools Tile > Query Folder > Query Viewer

See detailed instructions for running queries in Appendix, "Instructions for Running a Query"

List of Queries

SIS_GRAD_ALPHALIST_ALL_LIAISON

For all students on Graduation Approval List ,, any students with an incomplete or missing checklist or milestone item for Application Status of Departmental Review Complete (DR), College Hold (CH), College Cleared (CC) or Complete - Approved (AC).

NOTE: This query is run in Query Viewer – Production or Query Manager – Production.

SIS_GRAD_ALPHALIST_ONE_LIAISON

For all students on Graduation Approval List ,, any students with an incomplete or missing checklist or milestone item for Application Status of Departmental Review Complete (DR), College Hold (CH), College Cleared (CC) or Complete - Approved (AC).

NOTE: This query is run in Query Viewer – Production or Query Manager – Production.

SIS_GRAD_CHKLIST_CMPLT_NOGC

List of students who have completed all of their checklist items but who are not on the Graduation Approval List.

SIS_GRAD_GRADUATION_APRVL

List of students on the Graduation approval list for a specified term and status.

SIS_GRAD_MLSTN_CMPLT_NOGC

List of students who have completed all of their milestones but who are not on the Graduation Approval List.

SIS_GRAD_THESIS_IN_REVIEW_PUB

Overview and Objectives: This query allows personnel, upon input of the academic term, to obtain a list of all masters and doctoral students who appear on the graduation approval list for that term, have an application status of College Cleared, College Hold, Complete - Accepted or Departmental Review Complete, and who have submitted a thesis or dissertation that is still in "REVIEW" status.

The following information, ordered by last name, is provided for each student in the list: last name, first name, emplid, degree, academic program, thesis/dissertation title and application status.

The roles required are those normally set for a Graduate Services Coordinator and DGP, as well as the NCS
CAMPUS SR Query.

SIS_GRAD_WATCHLIST_ALL_LIAISON

List of all students on the watchlist

The watchlist contains all students whose Application Status is Departmental Review Complete, Complete - Approved, College Cleared or College Hold and who have any incomplete milestones or checklist items, or who have a thesis or dissertation whose Thesis Review Status is REVIEW.

SIS_GRAD_WATCHLIST_ONE_LIAISON

List of students on a specific liaison's watchlist.

The watchlist contains all students whose Application Status is Departmental Review Complete, Complete - Approved, College Cleared or College Hold and who have any incomplete milestones or checklist items, or who have a thesis or dissertation whose Thesis Review Status is REVIEW.

Graduate Commencement Bulletin

Objectives

The commencement bulletin is prepared for delivery to the Registrar.

Reminder

Request production of the commencement bulletin from the Graduate School IT Group.

Graduation Checkout (Processing Graduation Applications)

Objectives

Final step in clearing students for graduation is approval by the Graduate School.

Reminder

All checklist items, checklists and milestones must be completed, received, passed unconditionally, waived or deleted (in the case of milestones or duplicate checklists) prior to final checkout. Here are some handy tips for finalizing checklists and milestones.

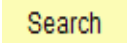
- Inapplicable checklist items may be waived.
- Inapplicable milestones must be deleted.
- Student is mixed option B plans will always have inapplicable checklist items and milestones.
- Students with co-majors have milestones assigned to each program. The milestones related to the *co-major* program should be deleted.
- Once all checklist items are appropriately updated, the status of the checklist should be marked completed.
- Masters students in thesis optional plans who opt for the non-thesis option will always have an inapplicable thesis milestone that needs to be deleted with a new effective dated row.

Navigation

Student Information System Homepage > Student Records Tile > Graduation Folder > Graduation Approval

Step 1

Enter student's name or EmplID

Click 

Step 2

Choose – College Cleared”. **Students marked college cleared will receive a degree in the plan you have cleared them in. Do not clear students until all grades are in and all other degree requirements are met.**

Click  Save

APPLYING TO GRADUATE FOR A STUDENT

Objectives

Graduate Records Staff can enter and process the application for graduation for students.

Reminder

Students may create their own application through self-service. Directors of Graduate Programs and Graduate Services Coordinators may create graduation applications for students as well. When using administrative pages to create graduation applications, one application must be created for each major, minor, co-major or co-minor. Students who create their own application through student self-service need only create one application for a given academic term.

Navigation

Student Information System Homepage > Student Records Tile > Graduation Folder > Graduation Approval

Step 1

1. On the basic search screen for “Graduation Approval”, choose the “Add a New Value” Tab

Graduation Approval 1

[Find an Existing Value](#) Add a New Value

Academic Institution: NCSU1 2

EmplID: 000 3

Academic Career: GRAD 4

Academic Program: PY 5

Academic Plan: 17PYPHD 6

Completion Term: 2091 7

Add Click to add

[Find an Existing Value](#) | [Add a New Value](#)

2. Enter NCSU1 in Academic Institution if it is not already there.
3. Enter Student ID # in EmplID Field
4. Enter GRAD in Academic Career
5. Enter Academic Program
6. Enter Academic Plan
7. Enter anticipated graduation term

Step 2

Click

Add

Step 3

On the “Application Tab”, select “**Applied for Degree**”

Application Application Comments All Applications

Graduation Approval

[Graduation Information](#)

ID: 000[redacted] [Email Student](#)

Expected Graduation Term: 2091 2009 Spring Term

Academic Career: Graduate

Academic Program: PY Physics

Academic Plan: 17PYPHD Major Physics-PHD

Application Status

☐ Applied for Degree
 ☐ Application Withdrawn
 ☐ Department Denied
 ☒ Department Review Complete

☐ College Cleared
 ☐ College Denied
 ☐ College Hold
 ☐ Complete - Approved

Last Modified By: MM[redacted] MA Meg[redacted] man Last Modified Date: 01/19/2009

Choose "Department Review Complete"

After saving, the User's Unity ID and the current date will populate

Step 4

Click 

Keying in Graduation Attendance

Objectives

This section provides steps for the Graduate School Graduation Coordinator to track which doctoral students plan to attend the University graduation ceremony in the RBC Center in order to create the graduation day walk list, coordinate the sponsor attendance and name pronunciation for the dean.

Reminder

When each doctoral graduate completes the required Doctoral Graduation Acceptance Notification (DGAN) on the MyPack Portal, the Graduation Coordinator receives an email notification which prompts the entry of the graduation attendance info into SIS.

Navigation

Student Information Systems Homepage > Student Records Tile > Comments Folder > Person Comment Entry

NOTE

A new comment entry is added for all comments, including any time there is a change. The most recent submission is the one that will reflect in the Graduate School reports used for graduation.

Tab Name

Find an Existing Value – Used to see what is current and if a change needs to be made.

Step 1

Person Comment Entry
Enter any information you have and click Search. Leave fields blank for a

Find an Existing Value [Add a New Value](#)

ID:

Enter the EmplID and click

Search

Step 2

Search Results
[View All](#)

ID	Sequence Number	Administrative Function	Comment Category	Academic Institution	Comment Date	Name
000123456	2	SPRG	CNAM	NCSU1	11/19/2009	[REDACTED]
000123456	1	SPRG	ATND	NCSU1	11/19/2009	[REDACTED]

Click on the row you wish to view.

[REDACTED] ID: **[REDACTED]**

Comment DateTime: 11/19/2009 2:32:32PM

*Administrative Function: Student Program

*Academic Institution:

*Comment Category: Attend Commencement [Variable Data](#)

Comment Data

Comment ID: Cutchins, Erica Braman

Department:

Comment Date:

Comments

Append Comments:

Person Comment Entry
Enter any information you have and click Search. Leave fields blank for a

Find an Existing Value [Add a New Value](#)

ID:

Enter the EmplID and click

Search

Click on the row you wish to view.

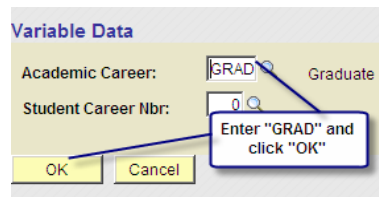
Add a New Value – Used to add a new comment.

Step 1

1. Administrative Function= SPRG (Student Program)
2. Comment Category = ATND (Attend Commencement)
3. User ID and current date default
4. Comments = Enter "YES" or "NO" to indicate the student's intent to attend graduation.

Click

Variable Data



Variable Data

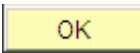
Academic Career: GRAD Graduate

Student Career Nbr: [Search Icon]

OK Cancel

Enter "GRAD" and click "OK"

Academic Career = GRAD

Click 

Click 

Keying in Name Pronunciation

Objectives

This section provides steps for the Graduate School Graduation Coordinator to manually add a comment that includes correct written pronunciation of a doctoral student's name who has reported they will attend the University graduation ceremony in the RBC Center.

Reminder

A written and formal guide to pronunciation is provided by the student in the Doctoral Graduation Acceptance Notification (DGAN) submission. The information can be copied and pasted from the email the Graduation Coordinator receives.

Navigation

Student Information Systems Homepage > Student Records Tile > Comments Folder > Person Comment Entry

Tab Name



Person Comment Entry

Find an Existing Value Add a New Value

ID: 000123456 [Search Icon]

Add

Enter ID and click "Add"

Step 1

Person Comment Entry

Commenter: [Redacted] ID: 000 [Redacted] ★

Comment DateTime: 11/03/2009 3:05:51PM

*Administrative Function: 1 SPRG Student Program

*Academic Institution: NC State University

*Comment Category: 2 CNAM Name Announced @ Graduation

Variable Data 5

Comment Data

Comment ID: 000 Freeman, Janice S.

Department: 3

Comment Date: 11/03/2009

Comments: 4 Yueying Liu
Eu(like europe)-ying Le-eu(like europe)

Append Comments:

1. Administrative Function = SPRG (Student Program)
2. Comment Category = CNAM (Name Announced @ Graduation)
3. User ID and current date default
4. Comments = Copy and paste student's name and pronunciation.

Step 2

5. Click

Variable Data

Academic Career: GRAD Graduate

Student Career Nbr: 0

Enter "GRAD" and click "OK"

OK Cancel

Academic Career = GRAD

Click

Click

Keying in Sponsor Relationship

Objectives

This section outlines the steps for the Graduate School Graduation Coordinator for entering the doctoral student selected NCSU faculty sponsor for the University graduation ceremony in the RBC Center.

Reminder

Every Doctoral graduate student who plans to walk at the University graduation ceremony in the RBC Center will choose an NCSU faculty sponsor to walk with them and sit with them

during the ceremony. When each doctoral graduate completes the required Doctoral Graduation Acceptance Notification (DGAN) on the MyPack Portal, the Graduation Coordinator receives an email notification which prompts the entry of the sponsor info into SIS.

Navigation

Student Information System Homepage > Student Profile Tile > Biographical Folder > Relationships

Tab Name



NOTE: The “Find an Existing Value” tab is used to view or update existing relationships. See instructions below.

Step 1

1. Effective date = defaults – do not change
2. Related ID = Use the magnifying glass to search for faculty member’s name that is on the email Doctoral Graduation Acceptance Notification (DGAN).

NOTE: Do not enter EmplID or leave it in this field after searching; panel will not save correctly unless this field is empty.

3. Name = When the magnifying glass is used to select the sponsor’s ID, the name will auto populate.
4. Relationship = Sponsor
5. Return to Related ID and delete the ID number.

Step 2

Click 

Graduate Certificates

Overview

SIS provides a mechanism for use by directors of graduate certificate programs (DGCP) to request the Graduate School to activate already matriculated Graduate or Non-Degree Status (NDS) students into a formal graduate certificate plan in the Graduate career and to clear them for completion when the time comes. For active degree-seeking graduate students this will be much like adding a minor plan or co-major plan to the official student program plan records. Upon completion of the certificate plan by the DGCP, the Graduate School will clear the student, the certificate will be awarded by the registrar, and the award published on the transcript.

DGCPs should notify the Graduate School as soon as possible of a student's intent and your agreement to have them activated into a graduate certificate plan in the graduate career. It is preferable that NDS students should not be activated in graduate certificate plans after the start of an academic term in which they are currently enrolled and taking classes toward the certificate. In such cases, set the admit term of the certificate plan effective with the beginning of the next academic term.

Having the Graduate School activate the NDS students who are pursuing graduate certificates in the graduate career has a number of direct benefits. One significant benefit is that it allows these students to enroll in the same manner and at the same time as other graduate students.

In order to activate any student in a graduate certificate plan, complete the "Graduate Student Certificate Plan Data Entry" form found on the graduate school forms page, and submit it to your Graduate School College Liaison.

Enrolling Students in Graduate Certificate Academic Plans

Objectives

This section provides step to activate a student in a Graduate certificate program.

Reminder

Academic program departments should notify the Graduate School as soon as possible of a student's intent and their agreement to have them activated into a graduate certificate program. Non-Degree Status students should not be activated in graduate certificate plans after the start of an academic term in which they are currently enrolled and taking classes toward the certificate. In such cases, set the admit term of the certificate plan effective with the beginning of the next academic term. Students will remain active in the plan as long as they are continuously enrolled.

Navigation

Student Information System Homepage > Student Records Tile > Career and Program Information Folder > Student Program/Plan

Page / Tab Name

Student Program/Plan – Search

Step 1

Search for the student's program plan records to determine if there are existing graduate student career numbers

Student Program/Plan
Enter any information you have and click Search. Leave fields blank for a list of

[Find an Existing Value](#) [Add a New Value](#) 2

EmplID:

Academic Career:

Student Career Nbr:

Campus ID:

National ID:

Last Name:

First Name:

☐ Include History ☐ Correct History ☐ Case Sensitive

1 [Basic Search](#)

Search Results
[View All](#)

EmplID	Academic Career	Student Career Nbr	Program Short Descr	Institution Short Descr	Name
	Graduate	1	G-MS&E	NC State U	
	Graduate	0	G-MS&E	NC State U	

Step 2

Add a New Value

Student Program/Plan

[Find an Existing Value](#) [Add a New Value](#)

ID: 3

Academic Career:

Student Career Nbr: 4

5

[Find an Existing Value](#) | [Add a New Value](#)

Step 3

Choose the Graduate Career

Step 4

Enter a student career number. If the student has previous student career numbers for the graduate career, increment the highest number by 1.

Step 5

Click

Page / Tab Name

Student Program/Plan – Student Program

Step 1 Current date defaults – Change to the date the student started the graduate certificate program.

NOTE: Entering a future effective dated row prevents administrators from accessing the record until that date is current.

Step 2 Program Action = ACTV - Activate - This is a required field.

Step 3 Program Reason = GCRT – Enroll in Graduate Certificate (EnrGradCer)

Step 4 Academic Program = GCERT Graduate Certificate. This is a required field.

Step 5 Admit Term - Indicated by the Director of the Graduate Certificate Program. This is a required field.

Step 6 Expected Grad Term = Enter if provided by the Director of the Graduate Certificate Program. This field is not required.

Step 7 Acad Load = LTHalfTime.

Page / Tab Name Student Program/Plan – Student Plan

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Mid [REDACTED] 00001 [REDACTED] 4

Academic Career: Graduate Student Career Nbr: 2 Car Req Term: 2006 Fall Term

Status: Active in Program Admit Term: Sum1 '09

Effective Date: 01/01/2009 Effective Sequence: 1

Program Action: Activate Action Date: 02/01/2009

Action Reason: Enroll in Graduate Certificate Requirement Term: Sum1 '09

Academic Program: Graduate C

*Academic Plan: 14MDCTG Med Devices Grad Certificate Certificate

*Plan Sequence: 10 Degree: CTG

*Declare Date: 01/01/2009 Degree Checkout Stat:

*Requirement Term: 2096 Sum1 '09 Student Degree Nbr:

*Advisement: Include Completion Term:

Save Notify Refresh Add Update/Display Include History

Student Program | Student Plan | Student Sub-Plan | Student Degrees

Step 1 Enter the certificate academic plan

Step 2 Enter any other information provided by the Director of the Graduate Certificate Program.

Step 3 Click 

Query for List of Students in a Minor or Certificate

Overview and Objectives

SIS_GRAD_CERTIF_MINOR_PLANS

The user can view a list of all graduate students enrolled in current or future terms who are also enrolled in a minor or certificate in a user-selected academic plan. Fields displayed are Term, EMPLID, Student Name, FERPA, Gender, Ethnicity, Academic Career, Units Taken for Progress, Total Cumulative Units, Unity ID, Advisor Name, Academic Program, Academic Plan, Academic Plan Type, Cumulative GPA, Current GPA, Academic standing, Tuition Residency, Residency Code, Email Address, Telephone, Mailing Address, and Local Address.

The role required to access this query is NCS CAMPUS SR Query.

Navigation

Student Information System Homepage > Reporting Tools Tile > Query Viewer

See detailed instructions for running queries in Appendix, "Instructions for Running a Query"

Awarding Graduate Certificates

Objectives See Graduate Checkout

Reminder Students must be active in the certificate plan before they can be cleared to graduate. An application for graduation must be submitted by the student or added manually by an administrative user such as a Graduate Services Coordinator, a graduate program director or a Graduate Records Officer. Once the College Cleared status is set on the application for graduation and the Registrar is notified, the nightly batch process will post the degree to the transcript, add a completion record on the student program plan record and a certificate will be produced.

Student Comments

Adding Comments

Objectives Graduate School Comments and Assistantship Exceptions can be entered by the Graduate Liaisons through Campus Community. The Director of Graduate Programs or Graduate Services Coordinator can view these exceptions.

Navigation Student Information System Homepage > Student Records Tile > Comments File > Person Comment Detail

Page Steps

1. Enter ID

2. Click 

*GS – Graduate
School Comment*

Page Steps

Person Comment Entry

Comment DateTime: 09/08/2011 9:05:57AM

ID: [Redacted]

*Administrative Function: **GEN** (1) General

*Academic Institution: NC State Univ (2)

*Comment Category: GS Graduate School (3) Variable Data

Comment Data

Comment ID: 000195172 (4) Cutchins, Erica Braman (5)

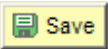
Department: [Redacted]

Comment Date: 09/08/2011 (6)

Comments: Student was granted a 3rd semester LOA per Dr. Willits email (08/14/2011)

Append Comments: [Redacted]

Save Notify Add Update/Display

1. Administrative Function = GEN
2. Comment Category = GS Graduate School Comment
3. Comment ID = User's ID defaults
4. Comment Date = Date defaults to current day
5. Optional comments can be entered by user
6. Click 

AEX – Assistantship
Exception

Page Steps

Person Comment Entry

[Redacted] ID [Redacted] ⊘ ★

Comment DateTime 10/11/2017 9:52:11AM

*Administrative Function 1 General

*Academic Institution ▼

*Comment Category 2 Assistantship Exception Variable Data

Comment Data

Comment ID 3 Erwin, Annie White

Department 4

Comment Date 5

Comments

Append Comments

6

Save Notify
Add Update/Display

1. Administrative Function = GEN
2. Comment Category = AEX Assistantship Exception
3. Comment ID = User's ID defaults
4. Comment Date = Term for which exception applies
 - 1/1/year – Spring
 - 6/1/year – Summer I
 - 7/1/year – Summer II
 - 8/1/year – Fall
5. Optional comments can be entered by user
6. Click Save

Viewing Comments

*View GS -
Graduate School
Comments*

Page Steps

Person Comment Detail
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID: begins with 000123456 **1**

Sequence Number: =

Administrative Function: begins with

Comment Category: begins with

Academic Institution: begins with

Comment Date: =

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Case Sensitive **2**

Search Clear Basic Search Save Search Criteria

1. Enter ID

2. Click **Search**

Person Comment Detail

ID: [Redacted] [X] ★

Comment DateTime: 09/08/2011 9:30:05AM

Administrative Function: **GEN** General **1**

Academic Institution: NC State University **2**

Comment Category: **GS** Graduate School **3** Variable Data

Comment Data

Comment ID: 000195172 **4** Cutchins, Erica Braman **5**

Department:

Comment Date: 09/08/2011

Comments: Student was granted a 3rd semester LOA per Dr. Willits. (email 08/14/2011).

Append Comments:

Save Return to Search Notify

1. Comment Category = GEN General

2. GS for Graduate School Comment

3. Liaison's name who entered comment

4. Comment Date = defaults to current day

5. Optional comments can be entered by liaison

View AEX - Assistantship Exception

Page Steps

Person Comment Detail
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID: begins with 000123456 1

Sequence Number: =

Administrative Function: begins with

Comment Category: begins with

Academic Institution: begins with

Comment Date: =

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Case Sensitive 2

Search Clear Basic Search Save Search Criteria

1. Enter ID

2. Click Search

Person Comment Detail

ID: [REDACTED]

Comment DateTime: 05/20/2010 7:17:43AM

Administrative Function: GEN General

Academic Institution: NC State University

Comment Category: AEX 1 Assistantship Exception Variable Data

Comment Data

Comment ID: 000007001 Thompson, Dorothy J. 2

Department:

Comment Date: 08/01/2010 3

Comments: Dr. Willits has approved the Assistantship Exception as of 5/19/2010 4

Append Comments:

Save Return to Search Notify

1. Comment Category = AEX Assistantship Exception

2. Liaison's name who entered comment

3. Comment Date = Term for which exception applies

1/1/year – Spring
 6/1/year – Summer I
 7/1/year – Summer II
 8/1/year – Fall

4. Optional comments entered by liaison

Graduate Student Support Plan and Graduate Appointments

GSSP Exception Request Evaluation

Objectives

Evaluation of GSSP Exceptions requests submitted by to the Graduate School for approval by the Graduate School Dean or their designee.

Reminder

The Director of Graduate Programs (or Graduate Services Coordinator designee) electronically submit the GSSP exception request forms to the Graduate School for approval. Exception requests should be submitted for the given semester by the deadline indicated on the Graduate School calendar.

Steps

The following criteria are used in evaluating the GSSP exception request.

1. Number of semesters of GSSP tuition benefits received by the student.
2. Detailed academic plan of completion provided by Director of Graduate Programs, including an approved plan of work.
3. Justification submitted by requesting department.
4. Student's Transcript (navigation: Student Information Services > Records and Enrollment > Transcripts > Unofficial Transcript) – used especially when academic factors such as passing the preliminary exam or being on a leave of absence might influence the decision.

Once a decision has been made an email response is sent back to the person that made the request. The decision (approved or denied) is posted to a cumulative semester spreadsheet located in a shared google doc. A person comment is entered to indicate an exception approval.

Enrollment Request Search

Objectives This section outlines procedures for accessing the enrollment history for a given student for a given term.

Navigation Student Information System Homepage > Student Records Tile > Enroll students Folder > Enrollment Request Search

Reminder This enrollment search only shows enrollment transactions since go-live in SIS. Refer to REG018 for any transactions that took place 1/30/09 or before.

Page / Tab Steps

Enrollment Request Search

Academic Institution: NC State University 4 Search

Academic Career: 1 Graduate

Term: 2 2101

Enrollment Request ID:

Enrollment Request Source:

Enrollment Request Action:

Enrollment Action Reason:

User ID:

ID: 3 000123456

Class Nbr:

Refresh Previous Search Result: ☒

Enrollment Action Range

From Date: 31

End Date: 31

Last Update Range

From DateTime:

Thru DateTime:

1. Academic Career – Graduate
2. Term –
3. ID – Student's ID
4. Click Search

Enrollment List Customize | Find | First 1-3 of 3

Fields 1-7		Fields 8-11	Fields 12-19	Fields 20-25	Fields 26-30	Fields 31-35	Fields 36-40	Fields 41-44
User ID	ID	Term	Class Nbr	Subject Area	Catalog Nbr	Academic Career		
1		2101	20748	PSY	895	GRAD		
2		2101	20748	PSY	895	GRAD		
3		2101	20748	PSY	895	GRAD		

Data spread across multiple tabs

This search will return data spread across multiple tabs. Scroll across the tabs to get to the information on each one.

Graduate Admissions

Duplicate ID Resolution

Objectives

This section outlines procedures for identifying and resolving duplicate ID situations. A duplicate ID is defined as one person having more than one Emplid.

Reminder

It is extremely important to delete or void duplicate ID's as quickly as possible before the ID is distributed across units on campus (dining, financial aid, housing, health services, etc. etc.). Keeping duplicate ID's from distribution on campus not only eases the clean-up of the duplicate ID, but it also can save the recipient of the duplicate ID a lot of confusion and miss-communication.

The office of Registration and Records is charged with reviewing the duplicate ID report and will send out the notifications that a duplicate ID has been generated. If the situation requires information to be moved to a different ID, it is imperative that this process occur the same day of the notification so the duplicate ID can be voided or deleted before the information spreads to additional units and systems.

Graduate Records Supervision

Objectives

Reminder

Replaces the use of PINS

Converting Student Records Tile From Legacy History

Objectives

To activate a student whose Student Records Tile were not converted with the SIS conversion in February 2009.

Navigation

Student Information System Homepage > Student Records Tile > Transcripts Folder > Student Activate From History

Step 1

Student Activate From History
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value


ID: begins with

Campus ID: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

[Basic Search](#)  [Save Search Criteria](#)

Enter ID or Name and click Search

Enter student's name or EMPLID

Click SEARCH

Step 2

Student Activate From History

Student ID 000

Birthdate 10/31/1953 Source of Data in Legacy ☒

Gender Female Data in Vault on Microfiche ☐

Legacy Conversion Messages

Click the "Activate Student" button

Academic Structure Actions

Objectives

Reminder

Terminology

*Academic
Programs*

Step 1

Update Instructor/Advisor - advisor program information, if necessary

Academic Plans

- Step 1* For new academic plans a record must be added to the academic plan table.
- Step 2* In the case of major type plans, until the legacy student system is completely retired, a legacy curriculum code must be created (legacy screen SSF002) and a record must also be added to the SIS Legacy Plan Crosswalk table.
- Step 3* Update checklist mass change definitions.
- Step 4* A plan milestone template must be created for each new academic plan.
- Step 5* Create Graduate Plan of Work template
- Step 6* Identify Directors of Graduate Programs and Graduate Services Coordinators (who by role definition have permission on Advising Registration Hold, graduate plan of work and departmental graduation clearance) and add the plan to each individual's security. Plans are required to make graduate plan of work workflow work properly

Academic Organizations

- Step 1* Add a record to the academic organization table.
- Step 2* Add a record to the academic organization tree.
- Step 3* Update Program Owner, if necessary.
- Step 4* Update Plan Owner, if necessary.

GRADUATE DEANS

SIS SECURITY ADMINISTRATION

New directors of
graduate program
and new Graduate
Services
Coordinators

Reminder

When individuals are appointed as directors of graduate programs or Graduate Services Coordinators a SAR request must be processed. As part of the SAR request, specific academic plans by be designated. Plans are required to make graduate plan of work workflow work properly.

**Graduate
Student
Support Plan
(GSSP) Data**

Objective

These pages provide the GSSP data for a specific student.

Navigation

Student Information Systems > Records and Enrollment > Custom Records and Enrollment > Graduate Support

Tab Name

Eligibility – Departments can see all the GSSP data regarding registration and appointment information. This tab is also where departments can check students Departmental Approval Flag.

Related

Eligibility	Funding	Tuition	Insurance	
-------------	---------	---------	-----------	--

Previous Related Master's Yes: <input checked="" type="checkbox"/> Overridden?: <input type="checkbox"/>	GSSP Admit Term GSSP Admit Term 2171 2017 Spring Term Overridden?: <input type="checkbox"/>	Residency 2171 OUT	Groups
---	--	----------------------------------	-----------------------

Program Stack Information

Career	Car #	Admit Term	Program	Plan	Status	Curr Load	Curr Units	Term
Graduate	0	2171	EE Electrical Engineering	14EEPHD Electrical Engineering-PhD	Active	No Units		2181

GSSP Eligibility

Eligibility		Override Details		Department Approval Details		FEET						
Term	Class	Progress Units	Academic Load	Census Units	Census Academic Load	Insurance	In-State	TR	BAS	Do Not Prorate		
2178 Fall '17	DR	10.00	Full-Time	10.00	Full-Time	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2171 Spring '17	DR	9.00	Full-Time	9.00	Full-Time	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Assistantship Data

Rcd#	Effective Date	Seq#	Action	Action Date	Appointment End Dt	Dept	Payroll Status	Empl Class	Job Code	Annual Rate	
0	08/16/2017	1	REH	07/31/2017	12/31/2017	140888	Materials Sci Engr-Grads&Temps	Active	GRD	A148	20000.000

[View All Assistantship Data](#)

Assistantship Distribution Data

Rcd#	Effective Date	Action Date	Seq#	Department	Project/Grant	Distrb %
0	08/16/2017	07/31/2017	0	140888	Materials Sci Engr-Grads&Temps	100.000
0	08/16/2017	06/20/2017	0	140488	Electri & Comp Engr Grad & Tmp	100.000

[View All Assistantship Distribution Data](#)

Fellowship Data

#	Effective Date	Status	Project/Grant	Amount	Start Date	End Date	Comment

[View All Fellowship Data](#)

Save	Return to Search	Notify	Add	Update/Display	Include History	Correct History
------	------------------	--------	-----	----------------	-----------------	-----------------

Eligibility | Funding | Tuition | Insurance

Tab Name	Funding – Departments can see the students funding for a specific semester. Click view all to see all semseters.
-----------------	--

Eligibility **Funding** Tuition Insurance

Funding Details Find | View All First 1 of 1 Last

Term 2178 2017 Fall Term
 Effective Date 08/16/2017
 Sequence 0
 Status Active

Category Details

Grad Health Insurance
 Category Eligible: ☒ Funding Declined ☐

*Account Code		% Distribution	Source Type		
556680	Interfacial Induced Properties	100.000	College	+	-

In-State Tuition
 Category Eligible: ☒ Funding Declined ☐

*Account Code		% Distribution	Source Type		
556680	Interfacial Induced Properties	100.000	College	+	-

Tuition Remission
 Category Eligible: ☒ Funding Declined ☐
 Match Declined: ☐

*Account Code		% Distribution	Source Type		
249490	Fall/Spring Tuit Remission	75.000	Split	+	-
556680	Interfacial Induced Properties	25.000	Split	+	-

Save Return to Search Notify Add Update/Display Include History Correct History

Eligibility | Funding | Tuition | Insurance

Tab Name

TPC (third party contract) – Departments can see when the students tuition (in-state and tuition remission) is submitted to the cashier's office as well as when the journal was processed. Click view all for all semesters.

Eligibility Funding **Tuition** Insurance

Contract Details Find | View All First 1 of 4 Last

*Term 2178
 *Contract Number 2178.200224870.1.1.1 - Tuition Remission - Manual Override
 Sequence Number 0
 Tuition Amount 7737.50 Contract Stop Date
 Posting Status Posted 10/04/2017

Last Updated: NCSR2533 08/09/17 9:24:16AM

Dist Type	Transaction Number	*Journal Status	Project/Grant	Account	Amount	Reference Code	Loaded to History	Date Posted		
O	127	Journal Completed	249490	40123	5803.130	2178 TR Abdelhamid	Y	10/04/2017	+	-
O	127	Journal Completed	556680	56575	1934.370	2178 TR MATCH Abdelhamid	Y	10/04/2017	+	-

Save Return to Search Notify Add Update/Display Include History Correct History

Eligibility | Funding | Tuition | Insurance

Tab Name

Insurance – Departments can see when the students insurance is paid, the amount paid and the project it was paid from. Insurance is paid monthly. Click view all for all the months.

Eligibility | Funding | Tuition | **Insurance**

Insurance Details Find | View All First 1 of 10 Last

*Term 2178 Payment Month October *Coverage Month October *Year 2017 Type Amount 179,210

Insurance Drop Date Insurance Drop Reason

*Project ID	Transaction Number	Source Type	Reference Code	Amount	Loaded to History	Journal Date
1 556680	129	College	2178 GSHI 10	179,210	Y	10/05/2017

Save Return to Search Notify Add Update/Display Include History Correct History

Eligibility | Funding | Tuition | Insurance

Graduate Student Support Plan (GSSP) Service Indicators

Objective This page provides the service indicator data for a specific student. Departments can add DNC (do not cancel) service indicators by semester for GSSP students. This indicator informs the cashier's office that a specific student will be sponsored by the GSSP.

Navigation Student Information System > Campus Community > Service Indicators > Person > Manage Service Indicators

Step 1 Select the "Add Service Indicator".

Manage Service Indicators



Display

1Effect AllInstitution NC State University

Refresh



Add Service Indicator

Service Indicator Summary									
Personalize Find View All									
First 1-5 of 5 Last									
Code	Code Description	Reason Description	Institution	Start Term		End Term	End Term Description	Start Date	End Date
DNC	Do Not Cancel Enrollment	Admin GSSP Indicator	NCSU1	2178	Fall '17				
DNC	Do Not Cancel Enrollment	Sponsored for fees	NCSU1	2171	Spring '17			01/18/2017	
DNC	Do Not Cancel Enrollment	Admin GSSP Indicator	NCSU1	2171	Spring '17			01/18/2017	
DNC	Do Not Cancel Enrollment	Admin GSSP Indicator	NCSU1	2171	Spring '17	2178	Fall '17	12/02/2016	12/31/2017
DNC	Do Not Cancel Enrollment	International - First term	NCSU1	2171	Spring '17	2171	Spring '17	11/04/2016	



Add Service Indicator



Return to Search



Notify

Step 2

Fill in Service Indicator Code with DNC. The Service Ind Reason Code should be GSSP. Departments can fill in any of the other information they feel is necessary. Click apply.

Add Service Indicator

*Institution NC State University

*Service Indicator Code

*Service Ind Reason Code

Description

Effect

Effective Period

Start Term End Term
 Start Date End Date

Assignment Details

*Department
 Reference
 Amount Currency

Contact Information

Contact ID Contact Person
 Placed Person ID Placed By

Comments

2000 characters remaining

Services Impacted

No Impacts are associated with the selected Service Indicator Code.

Service Indicator Date Time 10/10/2017 1:46:24PM

User ID ALWHITE7 Erwin, Annie White

Graduate Student Support Plan (GSSP) Health Insurance Eligibility

Objective This page provides Graduate Tuition Support & Health Insurance Eligibility by program (returns currently eligible students only).

Navigation Student Information Systems > Records and Enrollment > Custom Records and Enrollment > Graduate Support – By Department

Step 1 Enter academic program then click search.

Graduate Support

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID	begins with ▼	
Academic Institution	begins with ▼	NCSU1
Academic Career	begins with ▼	GRAD
Academic Program	begins with ▼	
Unity ID	begins with ▼	
National ID	begins with ▼	
Last Name	begins with ▼	
First Name	begins with ▼	

☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

Graduate Student Support Plan (GSSP) View Bill

Objective This page allows departments to view a students bill.

Navigation Student Information System Homepage > Campus Finances Tile > Student Accounts and Billing Folder
View Customer Accounts

Step 1 Enter student ID number then click search.

Customer Accounts

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit =

ID begins with

National ID begins with

Unity ID begins with

Last Name begins with

First Name begins with

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Step 2

Click View All. You can see a list of all of the student's charges and what they have or have not paid by term.

Click Account Details. Provides more details about the specific term.

Customer Accounts

Business Unit: NCSU1

ID: Academic Information

Total: -131.00

Anticipated Aid: 0.00

							Find	View All	First	1-2 of 2	Last
Account Type	Account Number	Pay Plan	Antc Aid	Balance	Open Date	Status					
STUDENT	STUDENT001- 2017 Fall Term	0.00	0.00	-131.00 USD	07/01/2017	Active	Account Details				
STUDENT	STUDENT001- 2017 Spring Term	0.00	0.00	0.00	11/02/2016	Active	Account Details				

Go to [Detail Transactions](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#) [No Tuition Cohort](#)

Return to Search

Notify

Step 3

Click Item Details. Provides more details about the specific charge.

Account Details

ID [REDACTED]		Business Unit NCSU1					
Account Number STUDENT001 Fall '17		Account Balance -131.00					
Debits 14,000.80		Credits -14,131.80		Applied 14,000.80		Unapplied -131.00	
Details						Find View All First 1-3 of 10 Last	
Item	Term	Class	Taxes	Amount Incl Tax	Balance	Installment ID	Last Activity Date
Advance Enrollment Deposit-Gra	Spring '17			-131.00	-131.00	07/01/2017	Item Details
Mandatory Health Insurance	Fall '17			0.00	0.00	08/09/2017	Item Details
Sponsor Transfer	Fall '17			-7,737.50	0.00	08/09/2017	Item Details

[Return](#)

Payment Line Details

ID			Business Unit NCSU1				
Item Number	000000000000023	Sponsor Transfer	Payment ID	7			
Item Amount	-7,737.50	Applied Amount	-7,737.50	Balance 0.00			
Reference Number			Item Type	6000000000000			
Account Split for Payment			Find View All First 1 of 1 Last				
Account Number	Account Term	Item Term	Item Amount				
STUDENT001	2017 Fall Term	2017 Fall Term	-7,737.50				
Details			Find View All First 1 of 1 Last				
Line Num	Posted	Effective	Billed	Due	GL Posted	Reference Number	Amount
1	08/09/2017	08/09/2017	09/07/2017	09/27/2017	08/09/2017 9:00:53PM		-7,737.50
Charges this Payment paid							
Details			Find View All First 1 of 1 Last				
Item Type	Account Number		Item Term		Date		Amount
Graduate Out-of-State Tuition	STUDENT001 Fall '17		2017 Fall Term		08/09/2017		7,737.50

[Return](#)

Appendix

Advisory Committee Member Types











Overview Each member is assigned a Type

Type	Notes
Chair	Committee's must have at least one Chair type member
Co- Chair	Multiple Co-Chairs member types may be included on an advisory committee
Consultant	
External	A faculty member from another university (who is not an Inter-institutional Graduate Faculty member) or a professional from industry or government with credentials comparable to those required for membership on the graduate faculty
GSR	Graduate School Representative
InterInst	Inter-institutional
Member	
Minor	Minor representative Instructor Advisor Records are not checked against the student minor on the committee.
Vice-Chair	A Vice-Chair is necessary only if a chair is Associate Status.

Checklists

Graduate Career Student Checklists and Related Items						
Chklst Item Code	Short Description	Checklist Item Description	Doctoral Checklist	Masters Checklist	Masters Mixed Opt B Checklist	Masters Opt B Checklist
GCOMM	Committee	Graduate Advisory Committee	x	x	x	
GDRCKM	DRchkMicro	DR Check/Money Order Microfilm	x			
GDRDAF	DRdisserAF	DR Dissertation Agreement Form	x			
GDRDPO	DRdisserPO	DR Dissertation Publishing Opt	x			
GDRGAL	DRgrattLtr	DR Graduation Attendance Ltr	x			
GDRFIN	DRReqSchF	DR Request to Sched Final Oral	x			
GDRSED	DRsurveyED	DR Survey of Earned Doctorate	x			
GMPERO	MRreqPermS	MR Request to Sched Final Oral		x	x	
GOPTBC	ReqOptBChk	Request for Option B Checkout			x	x
GPATEN	PatentAgre	Patent Agreement	x	x	x	x
GPOW	PlanofWork	Graduate Plan of Work	x	x	x	x
GPRERP	RptDRPrel	Report on DR Prelim Exam	x			
GPRES	ReqDRPre	Request to Schedule DR Prelim	x			
GRESR	ResCreditR	Residence Credit Requirement	x			
GRPFIN	RptFinExam	Report on Final Oral Exam	x	x	x	
GSREP	GradSchRep	Graduate School Representative	x			
GTMLMT	TimeLimitR	Time Limit Requirement Met	x	x	x	x
GTRANS	Transcript	Graduate Transcript	x	x	x	x

Expanded Graduate Career Terminology

-  Academic Career
-  Academic Group
-  Academic Organization
-  Academic Plan
-  Academic Program - An academic program is the program to which a student applies and is admitted and from which the student graduates. At the undergraduate level and academic program is a college. At the graduate career level, there are distinct academic programs for every area of study, such as mathematics and a biomedical engineering.
-  Academic Structure
-  Campus Community - The single system of record for all person data (students, faculty, staff, alumni, external organizations). Data is shared across systems (Student Admin/HR).
-  Graduate Student Checklist - A checklist is a collection of administrative items assigned to each student based on their academic plan. These checklists are assigned when students matriculate into an academic program and plan in the graduate career.
-  Matriculation – a program action indicating that a person has completed all necessary steps to become an active student in an academic program.
-  Milestone - Milestones are non-course related but vital academic requirements a student must complete toward degree progress to graduate.

Graduate Plan of Work and Advisory Committee Workflow

Graduate Advisory Committee Invitation

Subject: Graduate Plan of Work - Action Required for Test Student (555555555).

Body:

“You have been asked to serve on this student's Graduate Advisory Committee and approve their Plan of Work.

You may access your Worklist Tile by logging into the MyPack Portal and following the navigation: Main Menu > Student Information Systems > Faculty Services > Worklist Tile

Or you may use this link:

https://portal.acs.ncsu.edu/psp/EPPRD/EMPLOYEE/PHC890PRD/W/WORKLIST_TILE?ICAction=ICViewWorklist Tile&Menu=Worklist Tile&Market=GBL&PanelGroupName=WORKLIST_TILE&FolderPath=PORTAL_ROOT_OBJECT.NC000127.NC000295.NC_SIS_WORKLIST_TILE&IsFolder=false&IgnoreParamTemp=FolderPath%2cIsFolder

For further information, refer to the SIS Faculty Training Manual:

<http://www.ncsu.edu/grad/faculty-and-staff/docs/GRAD-FACULTY-SIS-training-manual.pdf>

Thank you.”

Graduate Student Plan of Work – Work Flow Status

Workflow Status	
Status	Description
0	Awaiting work
1	Work in progress. Worklist Tile owner has accessed the work item but work is not complete.
2	Work item complete. Action taken.
3	Removed from Worklist Tile

Graduate Student Record Program Actions and Action Reasons

PROGRAM ACTIONS & ACTION REASONS - Graduate School Student Records						
Prog Actn	Program Action Descr	Action Rsn	Descr	Short Desc	Career Action Type	Legacy Action Log Code
Active Student Program Plan Records Actions						
ACTV	Activate	GADI	Intl Advanced Degree Mr to Dr	IntAdvDegr	Add	ADI
ACTV	Activate	GADV	US Advanced Degree Mr to Dr	USAdvDegr	Add	ADV
ACTV	Activate	GCMJ	Grad Co-Major	GrCoMaj	Add	CMJ
ACTV	Activate	GMOR	Grad Master On Route	GrMsonRte	Add	
ACTV	Activate	GMRD	Graduate 2nd Masters Degree US	Gr2MrDegUS	Add	MRD
ACTV	Activate	GMRI	Graduate 2nd Masters Deg Intl	G2MrDegINT	Add	MRI
ACTV	Activate	GDUD	Grad Dual Degree	GrDuDeg	Add	N/A
ACTV	Activate	GCRT	Graduate Certificate	GradCertif	Add	N/A
DISC	Discontinuation	GTER	Grad - Non-Comply Cont Reg	GrContReg	Update	TER
DISM	Dismissal	GPTW	Grad - Termination of Program	GrTermPrg	Update	PTW
LEAV	Leave of Absence	GLOA	Graduate Leave of Absence	GrLofA	Update	LOA
MATR	Matriculation	GRIN	Graduate Reinstatement	GrReinst	Update	RIN
DISC	Discontinuation	GCDD	Grad Curr/Degree Change - US	GrCuDeUS	Update	CDD
ACTV	Activate	GCDD	Grad Curr/Degree Change - US	GrCuDeUS	Add	CDD
DISC	Discontinuation	GCDI	Grad Curr/Degree Change - Intl	GrCuDeIntl	Update	CDI
ACTV	Activate	GCDI	Grad Curr/Degree Change - Intl	GrCuDeIntl	Add	CDI
PLNC	Plan Change	GMIN	Grad Declare Minor	GrDecMinor	Update	
PLNC	Plan Change	GDRM	Grad Drop Minor	GraDroMin	Update	
DISC	Discontinuation	GLAT	Graduate Lateral Transfer	GrLatTrf	Update	LAT
ACTV	Activate	GLAT	Graduate Lateral Transfer	GrLatTrf	Add	LAT
DISC	Discontinuation	GTRF	Graduate Transfer	GradTrf	Update	TRF
ACTV	Activate	GTRF	Graduate Transfer	GradTrf	Add	TRF
RADM	Readmit	GRTO	Grad Retro Leave of Absence	GRetLveofA	Update	LOA
RLOA	Return from Leave of Absense	GRLA	Graduate Return from Leave	GrRetLOA	Update	LOA
WADM	Administrative Withdrawal	GPTO	Grad - Terminate w/o Prejudice	GrTerwoPre	Update	PTO
Admitted & Matriculated Student Program Plan Records Actions						
DATA	Data Change	ADET	Adm - Earlier Term	AEarlyTerm	Update	
DATA	Data Change	GCTF	Adm - Conditional To Full	AdStChCoFu	Update	
DATA	Data Change	GFTC	Adm - Full to Conditional	AdStChFuCo	Update	
DEFR	Defer Enrollment	GDFR	Grad - Defer to Future Term	GDefFutTer	Update	
DISC	Discontinuation	AWNE	Adm - Will Not Enter	ANotEnter	Update	
DISC	Discontinuation	ADEN	Adm - Subsequent Denial	AdSubDeny	Update	
MATR	Matriculation	AAFT	Admission after Will Not Enter	ADafterWNE	Update	
PLNC	Plan Change	AMJC	Adm - Change Major	ACHgMajor	Update	
PRGC	Program Change	AMJC	Adm - Change Major	ACHgMajor	Update	

How to Use the SIS EXCEL Download Feature

How to use the SIS Excel Download Feature:

1. Within the MyPack portal, you will see the following icon (highlighted in screenshot below)...



2. When you click on this icon you will have the choice to download your results to an MS Excel format. You should get a pop-up box that prompts you to either Open or Save the file.
3. If you do not get the pop-up box, please follow the steps outlined on the following Graduate School FAQ webpage...

http://ncstategraduateschool.custhelp.com/cgi-bin/ncstategraduateschool.cfg/php/enduser/std_adp.php?p_faqid=1719

4. The instructions within the link above cover multiple browsers. If you are still having problems, please contact Darren White (darren_white@ncsu.edu) .

Milestones

Milestone	Formal Description
CANDIDACY	Doctoral Admission to Candidacy
DR PREORAL	Doctoral Preliminary Comprehensive Examination
MR FINORAL	Masters Final Comprehensive Examination
DR FINORAL	Doctoral Final Comprehensive Examination
MROPBREQ	Masters Option B Requirements
MRTHESES	Masters Thesis
DRDISSERTA	Doctoral Dissertation

Reporting - Queries

INSTRUCTIONS FOR RUNNING A QUERY

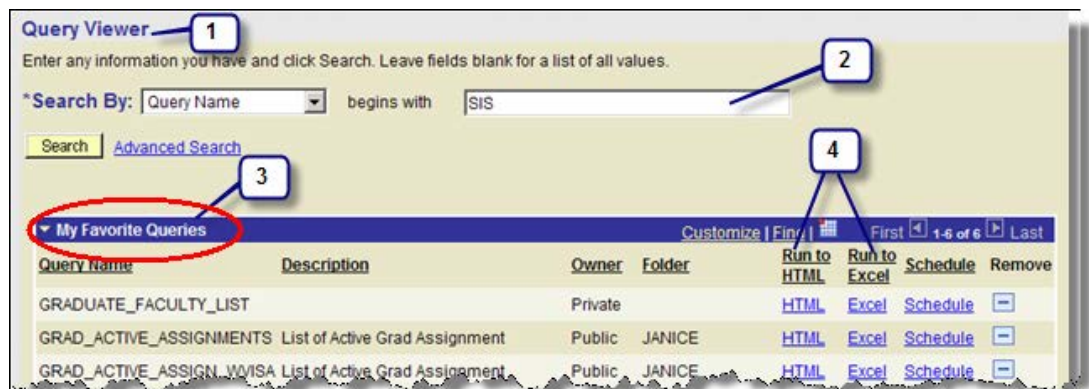
Reminder Queries are run against the Reporting database which contains data from the previous day's work. This means that **results are as of the close of business on the previous day**, as opposed to current.

Terminology See <http://www.fis.ncsu.edu/sis/training/SISTerm.pdf> for a complete SIS glossary

Navigation Main Menu > Student Information Systems > Monitoring Tools & Reports > Query Viewer – Reporting



Page Steps Query Viewer



1. Query environment
2. You can search for queries by entering all or part of the query's name.
3. Any queries that have been designated as "Favorites" will display when Query Viewer is opened.
4. Queries can be run to HTML or Excel

Step 1 Entering a string of letters will return a list of all queries that begin with those letters. If you know the name of the query, enter it exactly to return that specific query.

Enter the name of the query in the search box. The field is NOT case sensitive.

Search By: Query Name begins with sis_grad_pow_worklist_stat

Click

Step 2

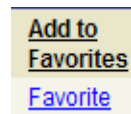
A list will generate based on the info entered in the search field. Entry of the exact name will return one query.

Query				Customize Find View All				First	1-2 of 2	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites			
SIS_GRAD_POW_WORKLIST_STAT	POW Worklist: User ID prompt	Public		HTML	Excel	Schedule	Favorite			

Click to add to favorites

Choose either HTML or Excel for results format

When the query is run, the user has the option of downloading the results into an HTML report or an EXCEL spreadsheet.



Clicking on the “Favorite” link will add query to your list of favorite queries.

HTML

If you choose “Run to HTML”, a new window will open displaying the results

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) (6 kb)

[View All](#) First 1-19 of 19 Last

	Work Item	Student Name	Student EMPLID	Originator ID	Priority	Date/Time of Last Update	status
1	DGP Approval	Rogers, William Lee	000209465	RPPLATIN		02/09/2009 8:39:15PM	pending
2	DGP Approval	Fannin, Amanda Marie	000800989	RPPLATIN		02/09/2009 7:15:06PM	pending
3	DGP Approval	Hamilton, Brandon Thomas	000198280	RPPLATIN		02/09/2009 8:13:09PM	pending
4	DGP Approval	Hardy, Ashley Elizabeth	000211305	RPPLATIN		02/09/2009 8:17:08PM	pending
5	DGP Approval	Degregorio, Andrew Dean	000720180	RPPLATIN		02/10/2009 11:56:49AM	open
6	DGP Approval	Hoch, Lindsey Jayne	000918253	RPPLATIN		02/09/2009 8:24:30PM	pending
7	DGP Approval	Hunt, Graham Kevin	000210504	RPPLATIN		02/09/2009 8:28:24PM	pending
8	DGP Approval	Richard, Donna Renee	000114517	RPPLATIN		02/09/2009 8:36:39PM	pending

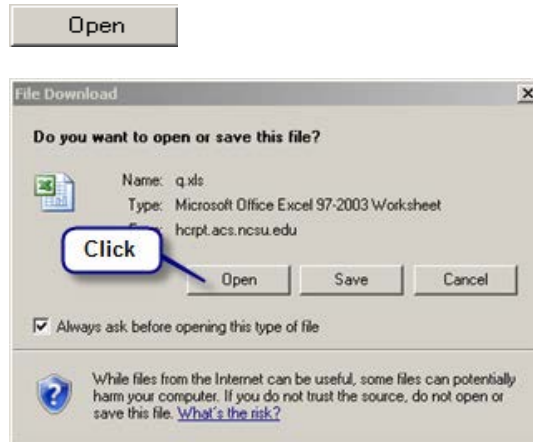
Results are view only

1. HTML results can be downloaded into EXCEL or Text file
2. Click [View All](#) to see all results. If “View All” is grayed out, all results are displayed.
3. The report displays the first 100 rows of information. You can click the arrow keys to move around in the document.

NOTE: HTML file can not be saved unless downloaded into EXCEL or Text file.

EXCEL

If you choose “Run to EXCEL”, a new window will open displaying the results. Depending on how your computer is set up, you may get a message asking if you want to open or save the file. Choose



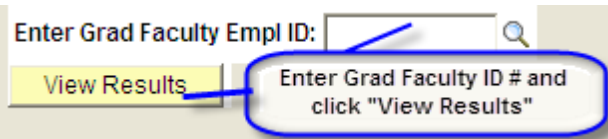
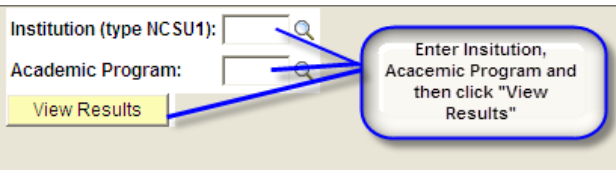
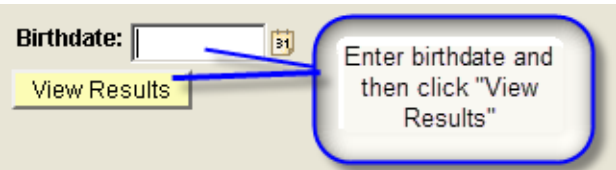
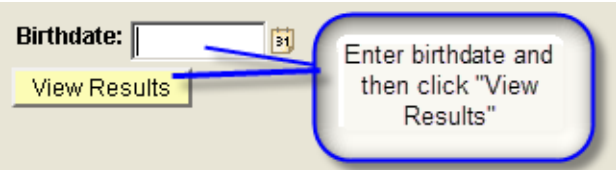
Results are displayed in an EXCEL spreadsheet and can be filtered, sorted, etc. The total number of records returned displays in the first row.

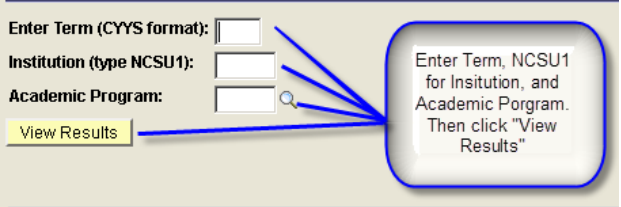
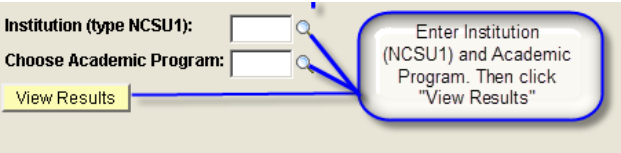
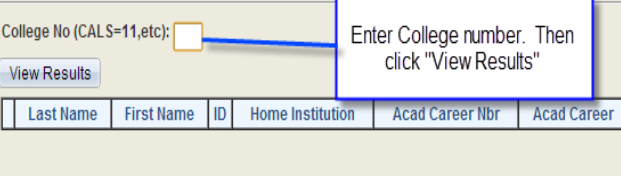

Work Item	Student Name	Student EMPLID	Originator ID	Priority	Date/Time of Last Update	status
DGP Approval	Rogers, William Lee	000209465	RPPLATIN		2/9/2009 20:39	pending
DGP Approval	Fannin, Amanda Marie	000800989	RPPLATIN		2/9/2009 19:15	pending
DGP Approval	Hamilton, Brandon Thomas	000198280	RPPLATIN		2/9/2009 20:13	pending
DGP Approval	Hardy, Ashley Elizabeth	000211305	RPPLATIN		2/9/2009 20:17	pending
DGP Approval	Degregorio, Andrew Dean	000720180	RPPLATIN		2/10/2009 11:56	open
DGP Approval	Hoch, Lindsey Jayne	000918253	RPPLATIN		2/9/2009 20:24	pending
DGP Approval	Hunt, Graham Kevin	000210504	RPPLATIN		2/9/2009 20:28	pending
DGP Approval	Richard, Donna Renee	000114517	RPPLATIN		2/9/2009 20:36	pending
DGP Approval	Schumacher, Janet E	000791229	RPPLATIN		2/9/2009 20:54	pending

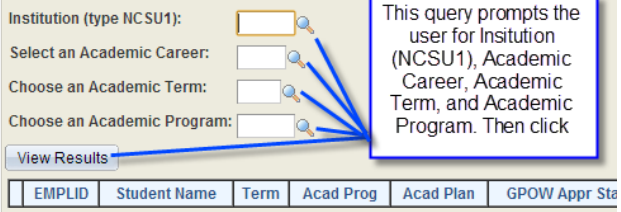

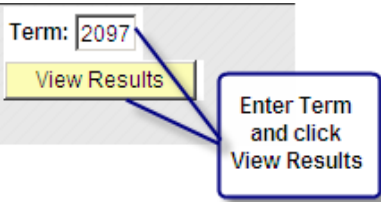
NOTE: File can be saved when in EXCEL format.

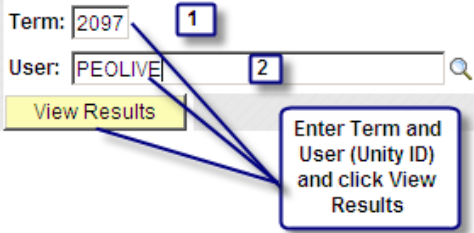
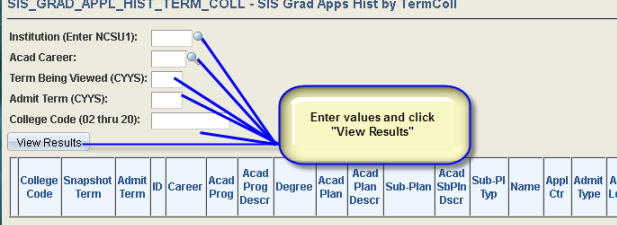
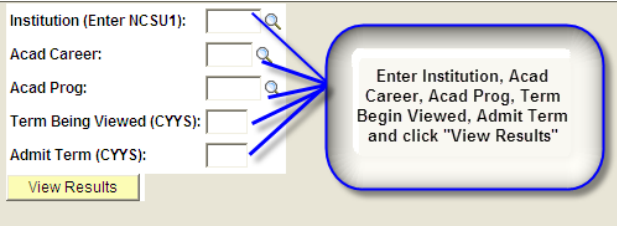
LIST OF QUERIES

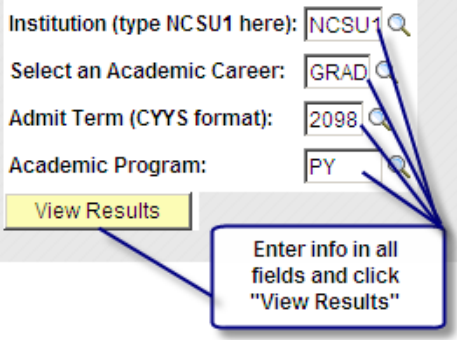
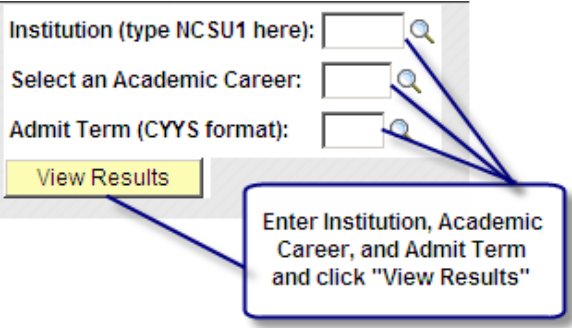
Query Name and Brief Description of Results	Notes	Who Has Access to Query?
DGP_GSC_SECURITY_ALL_NOTALL_PG Query Description: View a list of all users having the DGP or Grad Secretary security roles with an "ALL" row AND with explicit program rows in the program security table.	There is not a prompt for this query.	Graduate School

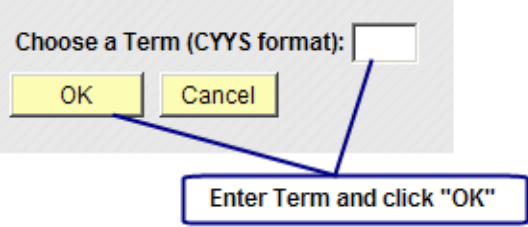
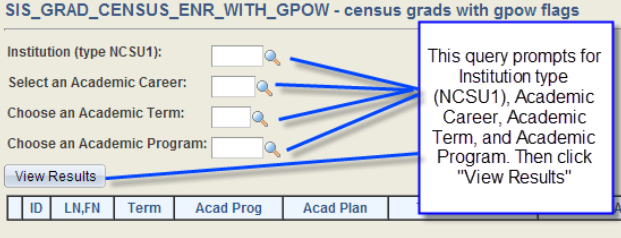
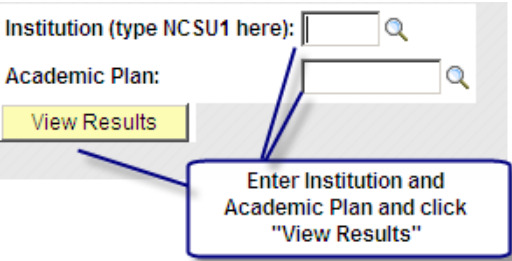
<p>GRAD_ARCHIVE_COMM_SVC_BY_ID</p> <p>Query Description: This query allows personnel, upon input of a graduate faculty ID, to obtain a list of all graduate committee on which a faculty member has served. Some data goes back as far as December 2001.</p>	<p>This query will “prompt” you for Grad Faculty Employ ID.</p> 	<p>Department</p> <p>Graduate School</p>
<p>GRAD_ARCHIVE_COMM_SVC_BY_PGM</p> <p>Query Description: GARS committee service records from archive tables (pre-SIS) by user-selected academic program. (Grad date will be blank for people who changed legacy curriculum code after census date.) Some data goes back as far as December 2001.</p>	<p>This query will “prompt” you for Institution (NCSU1) and Academic Program.</p> 	<p>Department</p> <p>Graduate School</p>
<p>GRAD_TST_SCORE_SUPN_BDAY_GRE</p> <p>Query Description: This query is used to search by date of birth to find unmatched GRE scores</p>	<p>This query will “prompt” you for the student’s birthdate.</p> 	<p>Department</p> <p>Graduate School</p>
<p>GRAD_TST_SCORE_SUPN_BDAY_TOEFL</p> <p>Query Description: This query is used to search by date of birth to find unmatched TOEFL scores</p>	<p>This query will “prompt” you for the student’s birthdate.</p> 	<p>Department</p> <p>Graduate School</p>
<p>GSSP_DEPT_APPRV_BY_PROG_TERM</p> <p>Query Description: Returns all information from first tab on Graduate Tuition Support screen by user selected term and academic program (for students who are active in that program)</p>	<p>This query will “prompt” you for the Term, Institution (NCSU1) and Academic Program.</p>	<p>Department</p> <p>Graduate School</p>

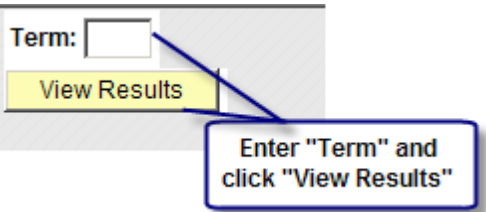
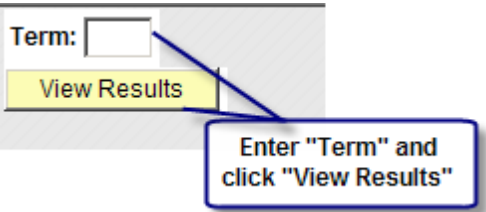
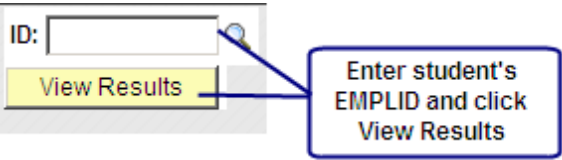
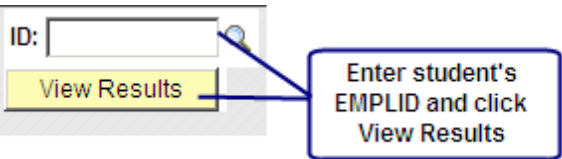
where the departmental approval flag has been checked.		
SIS_ALL_GRAD_DEGREES_BY_PROG Query Description: Returns list of approved grads with graduate degrees conferred in graduate majors for all terms after summer 1995 (both Legacy and SIS in one query) by user-selected academic program.	This query prompts the user for Institution (NCSU1) and Academic Program. 	Department Graduate School
SIS_GRAD_3_PLUS_X Query Description: This query returns active 3+X students and provides their home institution, current program and plan and term first enrolled.	There is not a prompt for this query.	Department Graduate School
SIS_GRAD_3_PLUS_X_BY_COLL Query Description: This query returns active 3+X students by college and provides their home institution, current program and plan and term first enrolled.	SIS_GRAD_3_PLUS_X_BY_COLL - Active stdnts in st group ZJU 	Department Graduate School
SIS_GRAD_ACAD_STAND Query Description: For one student, shows all of the student's academic standing actions along with the student's current academic standing status.	This query prompts the user for the student's EMPLID. The magnifying glass can be used to search if the value is not known. 	Graduate School

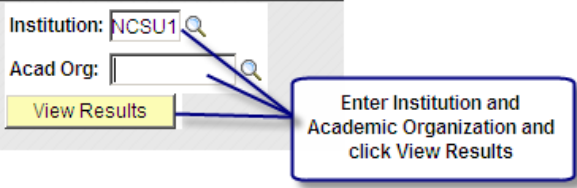
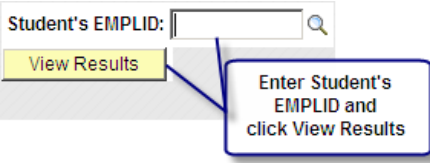
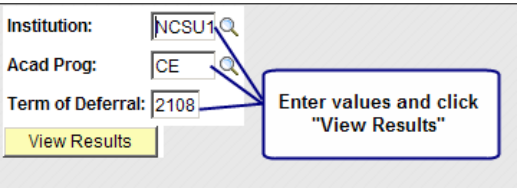
<p>SIS_GRAD_ADVISOR_WITH_GPOW</p> <p>Query Description: For a user-selected current or future term & academic program, it returns a list of grads enrolled in that program, showing the overall status of their GPoW (approved, denied, etc.), along with the term first enrolled in the grad career. It also shows the name & ID of each student's advisor & includes a flag that shows if the chair, vice-chair, or co-chair has approved the GPoW.</p>	<p>SIS_GRAD_ADVISOR_WITH_GPOW - grads w/advisor & gpow status</p>  <p>EMPLID Student Name Term Acad Prog Acad Plan GPoW Appr Sta</p>	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_A2G_BELOW_B</p> <p>Query Description: Returns a list of all grads from a user-selected program whose graduation checkout status = "applied to graduate" having any graduate classes with a grade lower than a B- (excludes AU, S, and TR).</p>	<p>SIS_GRAD_A2G_BELOW_B - Applied to Graduate below B</p>  <p>Acad Prog Acad Plan Degree ID Last Name First Name Graduating Term C</p>	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_ALPHALIST_ALL_LIAISON</p> <p>Query Description: View a list of all graduate students who have an application status of Applied, Approved, College Cleared, College Hold, or Dept. Review Complete on the Graduation Approval List for a prompted term. The status of each student's milestones and checklists is displayed.</p> <p>NOTE: This query is run in Query Viewer – Production or Query Manager – Production</p>	<p>This query will “prompt” you for a Term.</p>  <p>Term is always represented by a four-digit number in the CYYS format. Example: 2097 is Summer Session II 2009. “2” represents the century, “09” represents the year, and “7” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	<p>Graduate School</p>
<p>SIS_GRAD_ALPHALIST_ONE_LIAISON</p> <p>Query Description: View a list of all graduate students who have an application status of Applied, Approved, College Cleared, College Hold, or Dept. Review Complete on the Graduation Approval List for a prompted</p>	<p>This query will “prompt” you for a Term and a User (Unity ID).</p>	<p>Graduate School</p>

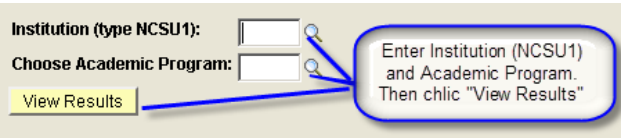
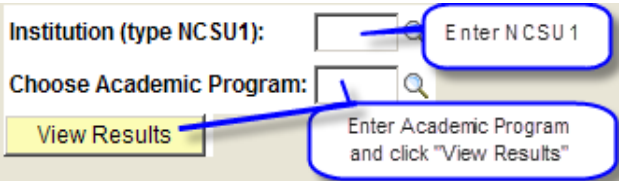
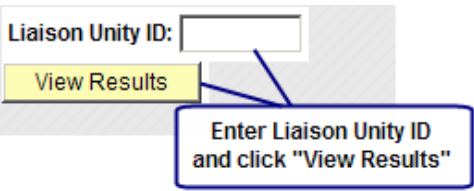
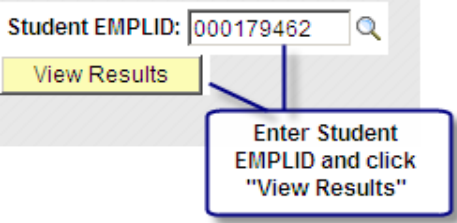
<p>term. The status of each student's milestones and checklists is displayed. Only the students for a prompted liaison are shown.</p> <p>NOTE: This query is run in Query Viewer – Production or Query Manager - Production</p>	 <ol style="list-style-type: none"> 1. Term must be current, will not work for past terms. 2. User is the Unity ID and must be entered in ALL CAPS. The magnifying glass can be used to search if the value is not known. 	
<p>SIS_GRAD_APPL_HIST_TERM_COLL</p> <p>Query Description: A list of applicants for a user-selected career, historical admit term, historical snapshot term, and two-digit academic college code, along with GRE scores and gender/ethnic data. Select terms back to fall 2009.</p>		<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_APPL_HIST_TERM_PGM</p> <p>Query Description: A list of applicants for a user-selected career, historical admit term, historical snapshot term, and academic program, along with GRE scores and gender/ethnic data. Select terms back to fall 2009.</p>	<p>Prompt for past admit term</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_APPL_WITH_GRE_SCORES</p> <p>Query Description: A list of applicants for a user selected career, current or future term, and program along with their most recent GRE scores (all components with percentiles included).</p>	<p>This query will “prompt” you for the Institution (NCSU1), an Academic Career, Admit Term, and Academic Program. The magnifying glass can be used to search if the value is not known.</p>	<p>Department</p>

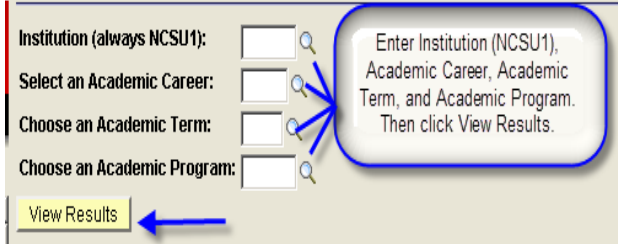
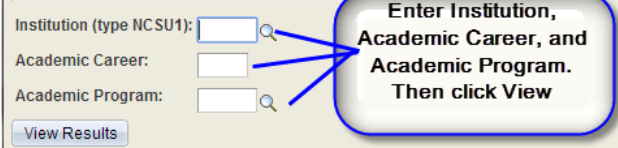
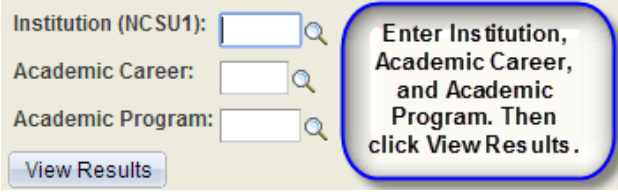
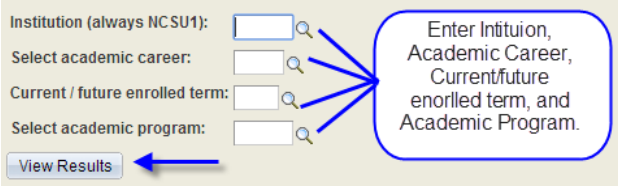
	 <p>Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	
SIS_GRAD_APPL_WITH_SCHOOLS Query Description: Current or future applications from admissions denorm table joined with education denorm to pick up self-reported education history information for each applicant's most recent undergrad and grad institution	<p>This query will “prompt” you for Institution (NCSU1), Academic Career (GRAD), and Admit Term.</p> <p>Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p> 	Department Graduate School
SIS_GRAD_CENSUS_ENROLLMENT Query Description: List of students registered as of census date in a user selected term.	<p>This query will prompt you for an academic term. Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	Department Graduate School

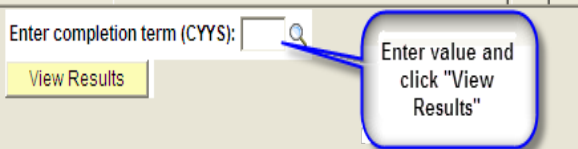
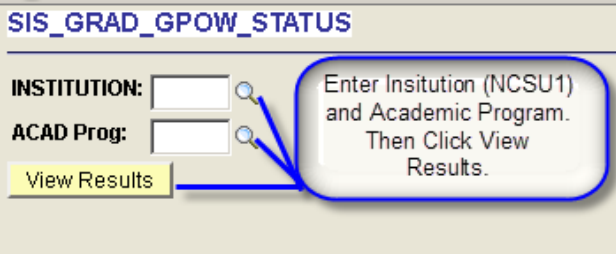
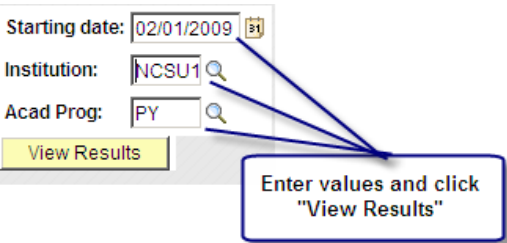
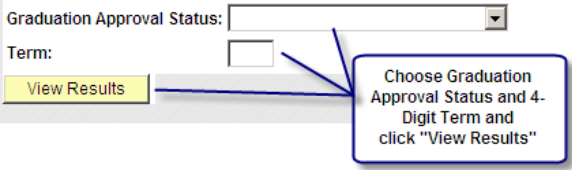
		
SIS_GRAD_CENSUS_ENR_WITH_GPOW Query Description: For a user-selected career, previous term, and academic program, it returns a list of grads enrolled as of census in that term and program, showing the overall status of their GPoW (approved, denied, etc.) and status date, along with the term first enrolled in the grad career. It also includes a flag that shows if the chair, vice-chair, or co-chair has approved the GPoW.		Department Graduate School
SIS_GRAD_CERTIF_MINOR_PLANS Query Description: List of all graduate students enrolled in current or future terms that are also enrolled in a minor or certificate in a user-selected academic plan.	This query will “prompt” you for Institution (NCSU1) and Academic Plan. This will narrow your results to only that one plan. The magnifying glass can be used to search if the value is not known. 	Department Graduate School
SIS_GRAD_CHKLST_CMPLT_NOGC Query Description: List of students who have completed all of their checklist items but who are not on the Graduation Approval List.	There is not a prompt for this query.	Graduate School
SIS_GRAD_CHKLST_WRONG_MR_DRC Query Description: View a list of students on the graduation list who have a doctoral plan but a Masters	This query will “prompt” you for a Term. Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the	Graduate School

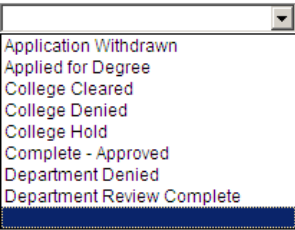
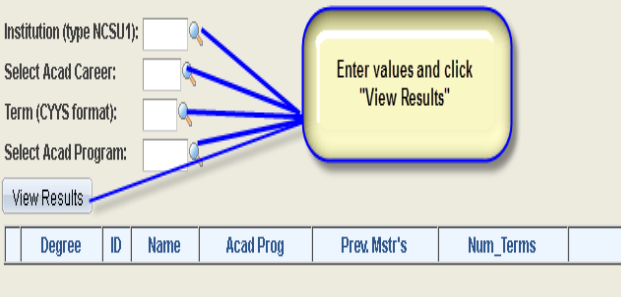
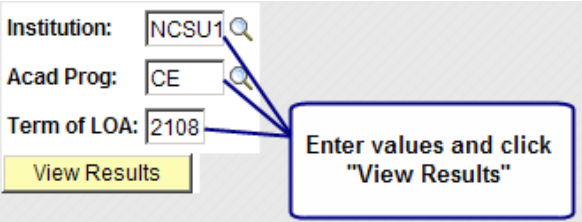
<p>checklist and who have an application status of Approved, College Cleared, College Hold or Dept. Review Complete for a prompted term.</p> <p>NOTE: This query is run in Query Viewer – Production or Query Manager - Production</p>	<p>year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p> 	
<p>SIS_GRAD_CHKLIST_WRONG_DR_DRC</p> <p>Query Description: View a list of students on the graduation list who have a masters plan but a doctoral checklist and who have an application status of Approved, College Cleared, College Hold or Dept. Review Complete for a prompted term.</p> <p>NOTE: This query is run in Query Viewer – Production or Query Manager - Production</p>	<p>This query will “prompt” you for a Term.</p> <p>Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p> 	Graduate School
<p>SIS_GRAD_CMT_HISTORY</p> <p>Query Description: View a list of all members of a grad student's GPOW committee, including members who are no longer on the committee.</p>	<p>This query prompts the user for the student’s EMPLID.</p> 	Graduate School
<p>SIS_GRAD_COMPLETED_THESIS</p> <p>Query Description: A complete record including thesis title is returned if the student has a completed thesis. No values are returned if the student does not have a completed thesis.</p>	<p>This query prompts the user for the student’s EMPLID.</p> 	Department Graduate School
<p>SIS_GRAD_COND_ADM_CHECK</p> <p>Query Description:</p>	<p>This query prompts the user for Institution (NCSU1) and Academic Organization. The magnifying glass can be used to search if the value is not known.</p>	Department

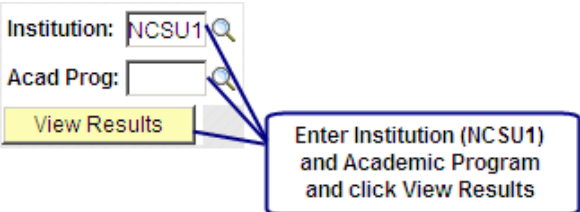
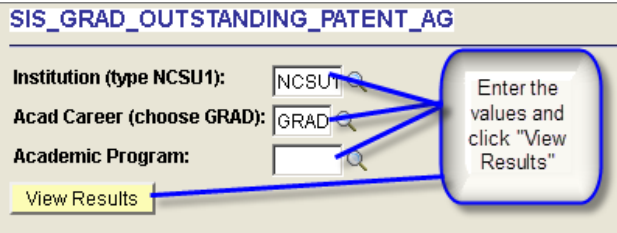
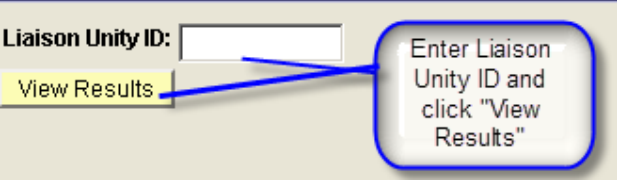
Students in an academic organization who are currently enrolled but were provisional admissions.		Graduate School
SIS_GRAD_COND_PASS_4_MO Query Description: A list of students for whom a conditional pass was entered (DR PREORAL, MR FINORAL or DR FINORAL) and the date of the exam is older than four months.	There is not a prompt for this query.	Graduate School
SIS_GRAD_COND_PASS_6_MO Query Description: A list of all students who have a 6 month or older conditional pass for their MR final oral or DR preoral or final oral.	There is not a prompt for this query.	Graduate School
SIS_GRAD_DE_FOR_STDNT Query Description: View all courses in which a student has been enrolled. Distance education courses are identified.	This query prompts the user for a student's EMPLID; the magnifying glass can be used to search if the ID is not known. 	Department Graduate School
SIS_GRAD_DEFR Query Description: View a list of students whose term of admission was deferred and the term deferred to.	This query prompts the user for the Institution (NCSU1), an Academic Program, and an Academic Term. The magnifying glass can be used to search if the value is not known.  Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. "2" represents the century, "09" represents the	Department Graduate School

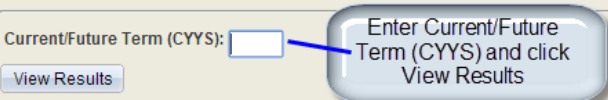
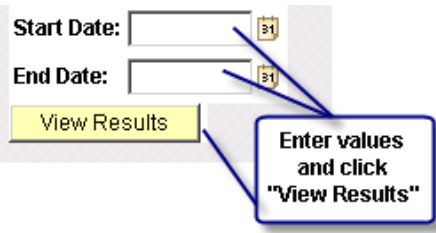
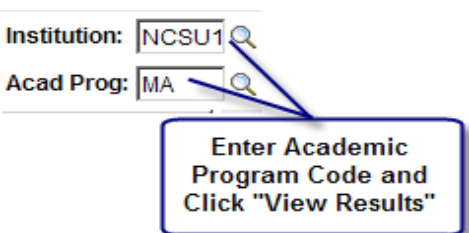
	year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.	
SIS_GRAD_DEGREES_BY_PROG Query Description: Returns list of approved grads with graduate degrees conferred in graduate majors for all terms after fall 2008 by user-selected academic program.	This query prompts the user for Institution (NCSU1) and Academic Program. 	Department Graduate School
SIS_GRAD_DEGREES_WITH_CHAIR Query Description: Query is based on a user-selected graduate program and will return approved graduate students for whom degrees were conferred. Also included is the name/ID of their chair, co-chair, or vice-chair (per GPoW screen).	This query prompts the user for Institution (NCSU1) and Academic Program. 	Department Graduate School
SIS_GRAD_DGP_GRDSEC_BY_LIAISON Query Description: View a list of Directors of Graduate Programs and their administrative assistants by program and by user-selected Graduate School liaison.	This query prompts the user for a Graduate School Liaison’s Unity ID. 	Graduate School
SIS_GRAD_DR_RESID Query Description: Query allows the user to determine, for a doctoral student, at what term in the GPOW the student has met the requirements for residence credit.	This query will “prompt” you for a Student EMPLID. The magnifying glass can be used to search if the value is not known. 	Graduate School
SIS_GRAD_ENROLLED_FULBRIGHT Query Description:	This query will “prompt” for Academic Career, Academic Term and Academic Program.	Department

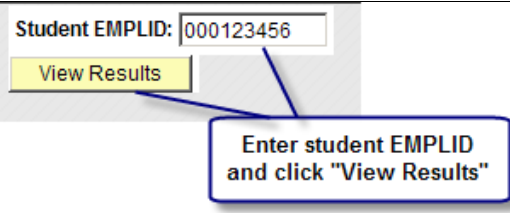
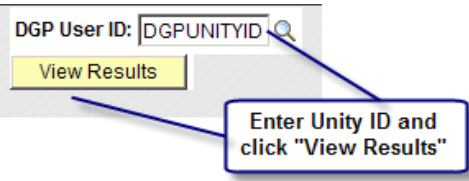
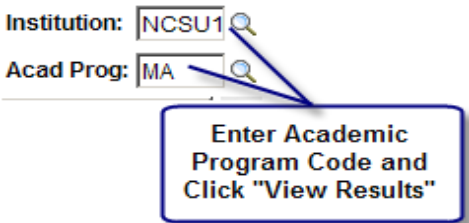
<p>Returns a list of Fulbright students for a user-selected career, current or future term, and academic program.</p> <p>NOTE: Fulbright grads are identified by the criterion STDNT_GROUP = FULB in STDNT_GRP_HIST (the Student Groups History table)</p>	<p>SIS_GRAD_ENROLLED_FULBRIGHT - Fulbright Grad Students</p> 	<p>Graduate School</p>
<p>SIS_GRAD_ENR_MLSTN_ACAD_LOAD</p> <p>Query Description: Returns list of masters students enrolled in the current or future term for a user selected academic program with flags for option B milestone, thesis milestone, approved GPoW, minimum GPoW hour requirement, enrollment hours, and if they have received the insurance benefit from the GSSP</p>	<p>SIS_GRAD_ENR_MLSTN_ACAD_LOAD - current masters with flags</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_EXAM_RPTS_PROG_STATUS</p> <p>Query Description: Returns list of students having a master exam milestone, a doctoral prelim exam milestone, or a doctoral final exam milestone (with milestone status and date attempted) for a user-selected academic program. Results also show the most recent acad program status (active, completed, LOA, etc).</p>	<p>SIS_GRAD_EXAM_RPTS_PROG_STATUS</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_EXAM_STATUS_LIST</p> <p>Query Description: This query returns a list of active students with doctoral prelim, doctoral final, or masters final exam milestones; shows bio/demo type data plus complete status (i.e., conditional pass, unconditional pass, fail, blank, etc.) for a user-selected academic program and user-selected current or future term.</p>	<p>SIS_GRAD_EXAM_STATUS_LIST - exam milestones w/compl status</p> 	<p>Department</p> <p>Graduate School</p>

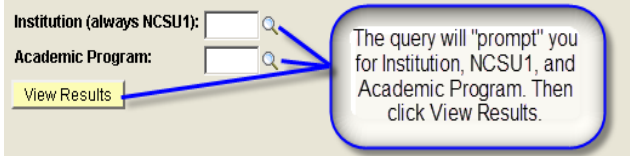
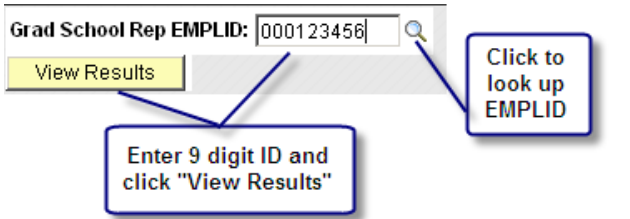
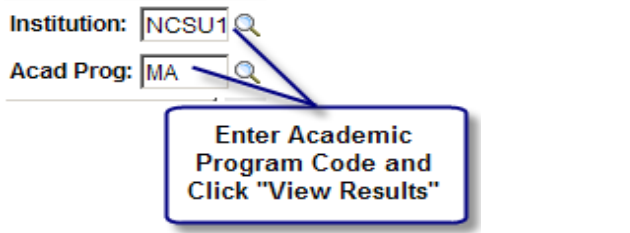
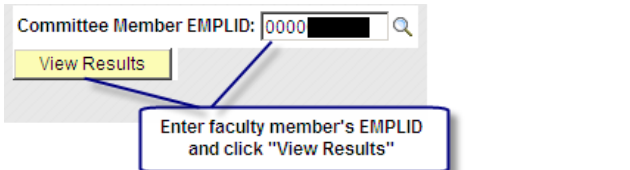
<p>SIS_GRAD_GCERT_COMPLETED</p> <p>Query Description: Returns people who completed graduate certificate (GCERT academic program) for a user-selected completion term. Shows emplid, name, and academic plan</p>	<p>Search criteria are by academic program and academic plan and term.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_GPOW_STATUS</p> <p>Query Description: Returns a list of all students in a user selected academic program, and their graduate plan of work status.</p>	<p>This query will “prompt” you for Institution and Academic Program.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_GPW_GS_APRVL_PUB</p> <p>Query Description: View a list of all students in a program whose graduate POW has been either approved or denied by the Graduate School (uses a prompted starting date for search).</p>	<p>This query will “prompt” you for a Starting Date, the Institution (NCSU1), and the Academic Program. The magnifying glass can be used to search if the value is not known.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_GRADUATION_APRVL</p> <p>Query Description: View a list of students on the Graduation approval list for a prompted term and graduation approval status.</p>	<p>This query will prompt you for a Graduation Approval Status which can be chosen from the drop down menu, and a 4-Digit term.</p>  <p>Graduation Approval Status:</p>	<p>Department</p> <p>Graduate School</p>

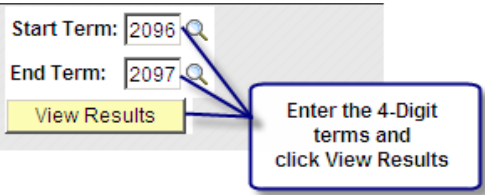
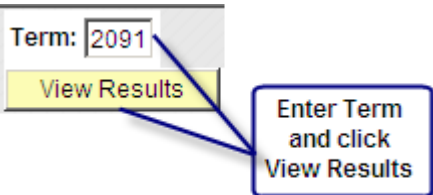
	 <p>Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	
<p>SIS_GRAD_GSSP_TERM_LMT_JOBS</p> <p>Query Description: Returns a list of grads enrolled in user-selected acad prog and term. Shows student id, name, prog, degree, prev master's flag, # of terms enrolled, whether or not student is within allowed # of GSSP terms (Within) or beyond (Beyond), and a flag to show if the person has either an active primary fellowship or an active assistantship with an annual rate of at least \$8000.</p>	<p>SIS_GRAD_GSSP_TERM_LMT_JOBS - grads with gssp term limits</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_LEAV</p> <p>Query Description: Provides the name, emplID, and return term for students on Leave of Absence</p>	<p>This query will “prompt” you for the Institution (NCSU1), the Academic Program, and a Term. The magnifying glass can be used to search if the value is not known.</p>  <p>Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6</p>	<p>Department</p> <p>Graduate School</p>

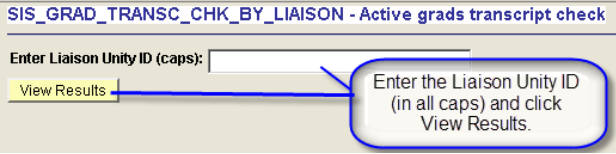

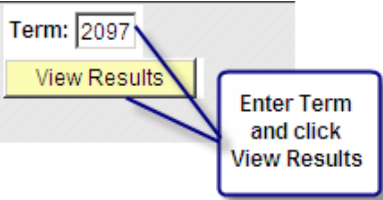
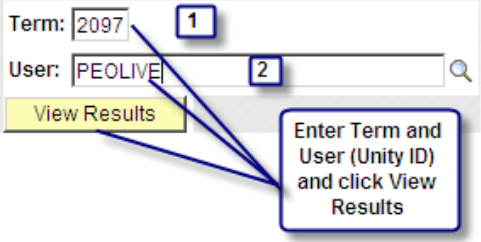
	for First Summer Session, 7 for Second Summer Session and 8 for Fall.	
SIS_GRAD_LOA Query Description: View a list of students currently on leave of absence for the user identified program.	This query will “prompt” you for the Institution (NCSU1), and the Academic Program. The magnifying glass can be used to search if the value is not known. 	Graduate School
SIS_GRAD_MLSTN_CMPLT_NOGC Query Description: List of students who have completed all of their milestones but who are not on the Graduation Approval List.	There is not a prompt for this query.	Department Graduate School
SIS_GRAD_OUTSTANDING_PATENT_AG Query Description: Outstanding patent agreement (checklist item "GPATEN" not received, completed, or waived) for registered grads in current or future term by user-selected academic program.	This query prompts the user for Institution (NCSU1), Acad Career (GRAD), and Academic Program. 	Department Graduate School
SIS_GRAD_OUTSTAND_POW_PAT_AGR Query Description: Outstanding gPOW or patent agreement (checklist items "GPATEN" or "GPOW" not received, completed, or waived) for registered grads in current or future term by user-selected Graduate School Liaison Unity ID.	This query prompts the user for a Graduate School Liaison’s Unity ID. 	Graduate School

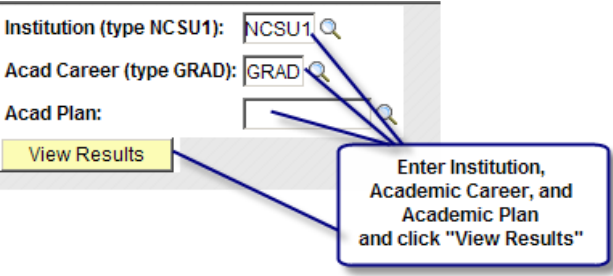
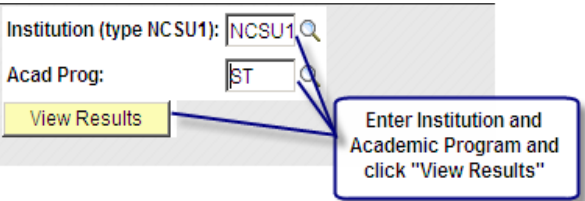
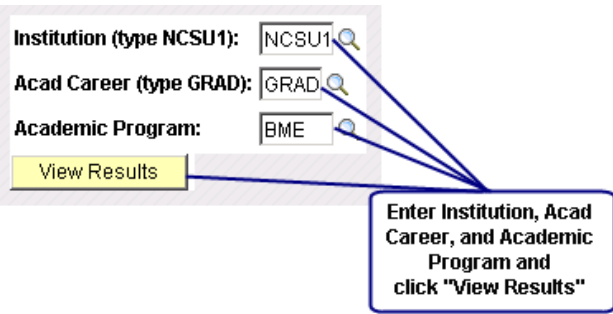
<p>SIS_GRAD_OVER_ENROLLED</p> <p>Query Description: Returns a list of degree-seeking grads (masters & doctorate; non-GCERT) for a user-selected current or future term who are taking more hours than the minimum required hours for completion of their program. Results also show a 'Y' for any student who received GSSP insurance in the same term selected.</p>	<p>SIS_GRAD_OVER_ENROLLED - MR DR enrolled > min required</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_PGM_PLAN_CHANGE</p> <p>Query Description: List of students who have any instances of a Program Change or Plan Change program action between beginning and end dates which are input by the query user.</p>	<p>This query will prompt you for a start date and an end date.</p> 	<p>Graduate School</p>
<p>SIS_GRAD_POW_ACAD_PROG</p> <p>Query Description: List of all graduate Plans of Work with a status of open or pending for all students in that academic program.</p>	<p>This query will “prompt” you for the Institution (NCSU1) and Academic Program code. This will narrow your results to only that one Program. The magnifying glass can be used to search if the value is not known.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_POW_WORKFLOW_HISTORY</p> <p>Query Description: View a complete Plan of Work workflow history for a student.</p>	<p>This query will “prompt” you for a student EMPLID. This will narrow your results to only that one student.</p>	<p>Department</p> <p>Graduate School</p>

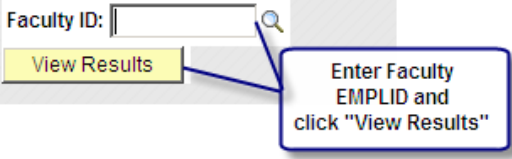
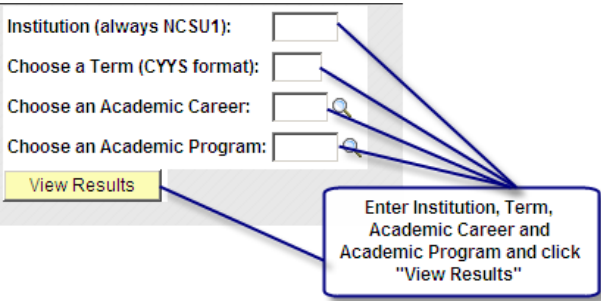
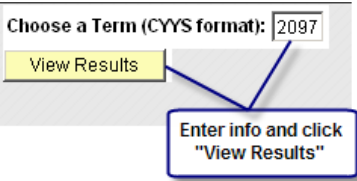
		
SIS_GRAD_POW_WORKLIST_TILE_STAT Query Description: List of all pending or open items on a DGP's Worklist Tile.	This query will "prompt" you for a DGP user ID. This will narrow your results to only that one DGP. The magnifying glass can be used to search if the value is not known. 	Department Graduate School
SIS_GRAD_PRELIM_SCHED Query Description: List of students who have not been scheduled for a doctoral prelim six or more years after the beginning of the term of the first class in their graduate POW.	This query runs when you click HTML or EXCEL and has no prompts.	Graduate School
SIS_GRAD_PRELIM_SCHED_BY_PROG Query Description: List of students who have not been scheduled for a doctoral prelim six or more years after the beginning of the term of the first class in their graduate POW in a specific academic program.	This query will "prompt" you for the Institution (NCSU1) and Academic Program code. This will narrow your results to only that one Program. The magnifying glass can be used to search if the value is not known. 	Graduate School
SIS_GRAD_PROVISIONAL_ADMITS Query Description: Provides a list of all grad students for a user-selected academic program who are currently on conditional (a.k.a. provisional)	The query will "prompt" you for Institution, NCSU1, and Academic Program.	Department Graduate School

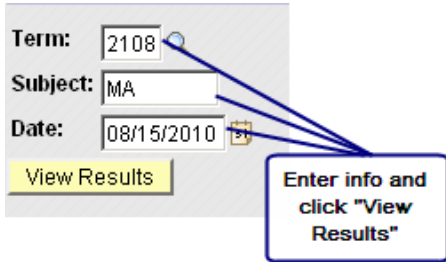
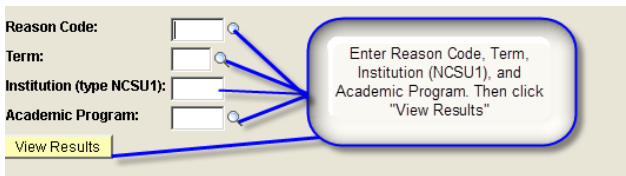
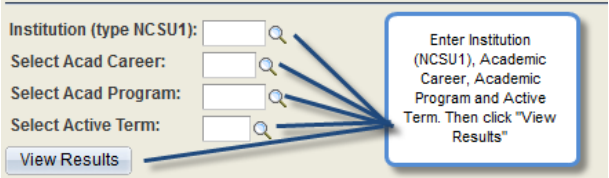
<p>admission and are eligible to enroll in the current term. Includes registration status, cumulative hours passed, and cumulative GPA as of the current term.</p>	<p>SIS_GRAD_PROVISIONAL_ADMITS - grads on cond adm per pgmstack</p> 	
<p>SIS_GRAD_REP</p> <p>Query Description: List of committees on which a Graduate Representative has served and the attempted dates for the preliminary oral and final oral exams.</p>	<p>This query will “prompt” you for an EMPLID of the Graduate School Representative. The magnifying glass can be used to search if the value is not known.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_STATUS</p> <p>Query Description: List of all current graduate students who are active in the user-selected academic program and their Plan of Work status.</p>	<p>This query will “prompt” you for the Institution (NCSU1) and Academic Program code. This will narrow your results to only that one Program. The magnifying glass can be used to search if the value is not known.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_STU_CMTEE_PUB</p> <p>Query Description: View a list for a prompted emplid for a GPOW committee member, of all students on which they serve as a member of their GPOW committee. Displays the student’s name, EMPLID, acad prog, acad plan, faculty role on committee, whether they have accepted membership on the committee, and if they approved the GPOW for the student. The last two columns (Degree Status and Degr Status</p>	<p>This query will “prompt” you for a faculty member’s EMPLID. This will narrow your results to only that one person. The magnifying glass can be used to search if the value is not known.</p> 	<p>Department</p> <p>Graduate School</p>

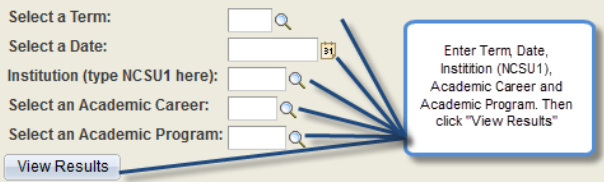

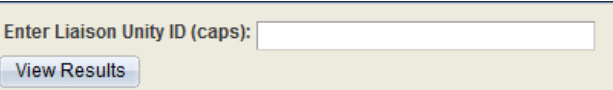
<p>Dt) are populated if the person was awarded a degree in the same academic plan.</p>		
<p>SIS_GRAD_TERMINATED</p> <p>Query Description: View a list of graduate students who have been terminated from their program from start to end prompted terms.</p>	<p>This query allows the user to search a date range. Prompts are for Start Term and End Term. The magnifying glass can be used to search if the value is not known.</p>  <p>Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	<p>Graduate School</p>
<p>SIS_GRAD_THESIS_IN_REVIEW_PUB</p> <p>Query Description: View a list of all masters and doctoral students who appear on the graduation approval list for a prompted term, have an application status of College Cleared, College Hold, Complete – Accepted or Departmental Review Complete, and who have submitted a thesis or dissertation that is still in “Review” status.</p> <p>NOTE: This query is run in Query Viewer – Reporting, Query Manager – Reporting, Query Viewer – Production or Query Manager – Production</p>	<p>This query will “prompt” you for a “Term” value. This will narrow your results to only that one term.</p>  <p>NOTE: Term is always represented by a four-digit number. Example: 2091 is Spring 2009. “2” represents the century, “09” represents the year, and “1” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	<p>Department</p> <p>Graduate School</p>

<p>SIS_GRAD_TRANSC_CHK_BY_LIAISON</p> <p>Query Description: The query returns a list of missing transcripts for active grads who have been here for more than two terms by user-selected Graduate School Liaison Unity ID.</p>	<p>The query will “prompt” you for Liaison “Unity ID”.</p> 	<p>Graduate School</p>
<p>SIS_GRAD_TRANSC_CHK_NEW_BY_LIA</p> <p>Query Description: The query returns a list of missing transcripts for NEW active grads (per admit term on the program stack) by user-selected Graduate School Liaison Unity ID.</p>	<p>The query will “prompt” you for Liaison “Unity ID”.</p> 	<p>Graduate School</p>
<p>SIS_GRAD_WATCHLIST_ALL_LIAISON</p> <p>Query Description: View a list of all grad students who have missing or incomplete milestones or checklists and who have an application status of Applied, Approved, College Cleared, College Hold, or Dept. Review Complete on the Graduation Approval List for a prompted term. The status of each student’s milestones and checklists is displayed.</p> <p>NOTE: This query is run in Query Viewer – Production or Query Manager – Production</p>	<p>This query will “prompt” you for a Term.</p>  <p>Term is always represented by a four-digit number in the CYYS format. Example: 2097 is Summer Session II 2009. “2” represents the century, “09” represents the year, and “7” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	<p>Graduate School</p>
<p>SIS_GRAD_WATCHLIST_ONE_LIAISON</p> <p>Query Description: View a list of all grad students who have missing or incomplete milestones or checklists for a prompted liaison who have an application status of Applied, Approved, College Cleared, College Hold, or Dept. Review Complete on the Graduation Approval List for a prompted term. The status of each student’s milestones and checklists is displayed. Only the students for a prompted liaison are shown.</p>	<p>This query will “prompt” you for a Term and a User (Unity ID).</p>  <p>1. Term must be current, will not work for past terms.</p>	<p>Graduate School</p>

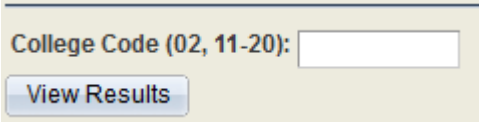
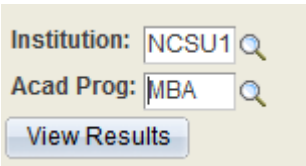
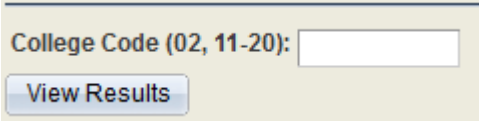
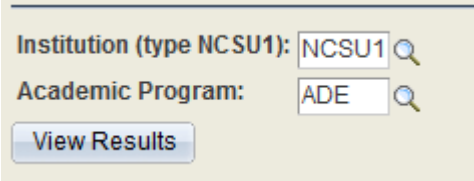
<p>NOTE: This query is run in Query Viewer – Production or Query Manager – Production</p>	<p>2. User is the Unity ID and must be entered in ALL CAPS</p>	
<p>SIS_GRADUATE_FAC_BY_PLAN</p> <p>Query Description: View a list of active members of the Graduate Faculty by user selected plan. (Typically best used for minor-type plans).</p>	<p>This query prompts the user for the Institution (NCSU1), the Academic Career (GRAD), and an Academic Plan. The magnifying glass can be used to search if the value is not known.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRADUATE_FAC_BY_PROGRAM</p> <p>Query Description: List of active members of the Graduate Faculty by user selected program.</p>	<p>This query prompts the user for the Institution (NCSU1) and the Academic Program. The magnifying glass can be used to search if the value is not known.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRADUATE_FAC_CMTEE_ROLES</p> <p>Query Description: Displays all committee memberships for graduate faculty in a prompted program.</p>	<p>This query prompts the user for the Institution (NCSU1), the Academic Program (GRAD), and the Academic Program. The magnifying glass can be used to search if the value is not known.</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRADUATE_FAC_PGMS_BY_ID</p> <p>Query Description:</p>	<p>This query prompts the user for a faculty member's EMPLID. The magnifying glass can be used to search if the value is not known.</p>	<p>Department</p>

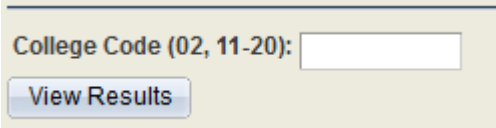
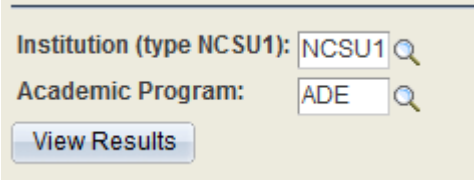
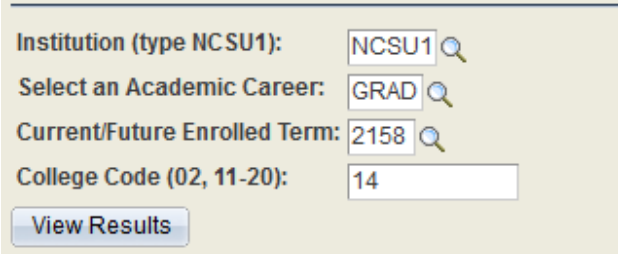
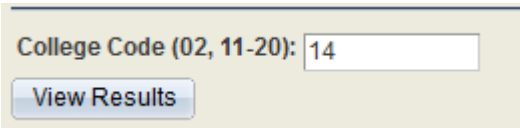
View a list of programs assigned to a member of the Graduate Faculty by user selected employee ID.		Graduate School
SIS_GRADUATE_FACULTY_LIST Query Description: List of all active members of the Graduate Faculty.	This query runs when you click HTML or EXCEL and has no prompts.	Department Graduate School
SIS_NC_SUPEREXT_BY_TERM_CAR_PG Query Description: A list of students for a user-selected current or future term, career, and academic program.	<p>This query will “prompt” you for the Institution (NCSU1), Term, Academic Career (GRAD), and an Academic Program.</p>  <p>Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	Department Graduate School
SIS_NC_SUPEREXT_GRADS Query Description: List of students active in a current or future term.	<p>This query will “prompt” you for a term to be entered in CYYS format. This will narrow your results to only that one term.</p>  <p>Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6</p>	Department Graduate School

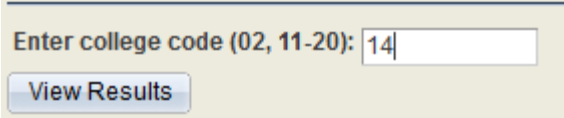
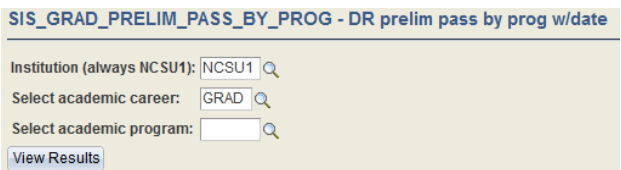
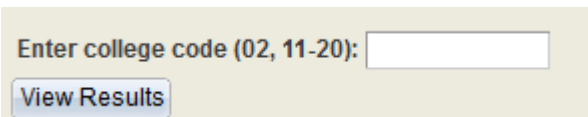
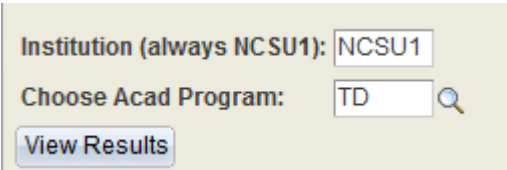
	for First Summer Session, 7 for Second Summer Session and 8 for Fall.	
SR_STUDENT_DROPS_AFTER_DATE_X Query Description: All students who dropped a course after a specific date.	This query will “prompt” you for a term, subject and date. The term will be entered in CYYS format. This will narrow your results to only that one term.  Term is always represented by a four-digit number in the CYYS format. Example: 2098 is Fall 2009. “2” represents the century, “09” represents the year, and “8” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.	
UCO_SERVICE_IND_REASN_TERM_PGM Query Description: Returns a list of students having a user-selected Service Indicator reason code for a user-selected academic term and academic program.	This query will prompt the user for Reason Code, Term, Institution (NCSU1), and Academic Program. 	Department Graduate School
SIS_GRAD_ALL_SVC_IND_TERM_PROG Query Description: Returns a list of students and their service indicator data (all service indicators) for a user-selected academic career, academic program, and active service indicator term. Shows academic program status.	This query will prompt the user for Institution, Academic Career, Academic Program and Active Term. 	Department Graduate School
SIS_GRAD_DROPS_AFTER_DATE_GSSP Query Description: This query returns a list of graduate students, by user selected term and academic program, who dropped a course after a user-selected date (one row per	This query will prompt the user for Term, Date, Institution, Academic Career and Academic Program.	Department Graduate School

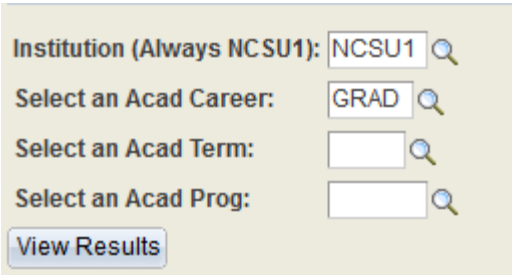
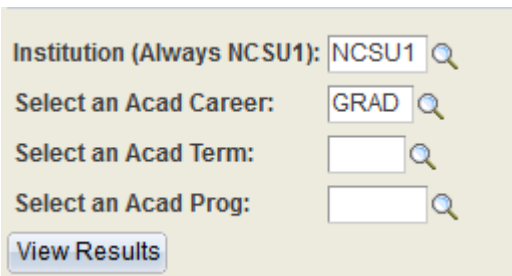
<p>person, per course dropped). It also shows the academic load and indicates those who received GSSP tuition and/or insurance benefits in the same term. The results from this query can be used to monitor students that drop out of GSSP eligibility because they have dropped or changed a course to audit after census (or a user selected date) causing them to drop below the full-time requirement.</p>		
<p>SIS_GRAD_COMP_REV_THES DISSERT</p> <p>Query Description: Returns list of grads with thesis or dissertation milestone (and milestone level of acceptance, review, or committee approval) for user-selected graduation term. Shows graduation checkout status.</p>	<p>This query will prompt the user for the Term (CYYS Format).</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_PROVISI_ADMITS_BY_LIA</p> <p>Query Description: Provides a list of all grad students for a user-selected Graduate School Liaison who are currently on conditional (a.k.a. provisional) admission and are eligible to enroll in the current term. Includes registration status, cumulative hours passed, and cumulative GPA as of the current term.</p>	<p>This query will prompt user for the Liaison Unity ID (all caps)</p> 	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_PROG_STATUS</p> <p>Query Description: Returns an alphabetic list of students for a</p>	<p>This query will prompt user for Institution (NCSU1), academic career, academic program, and academic program status:</p>	<p>Department</p>

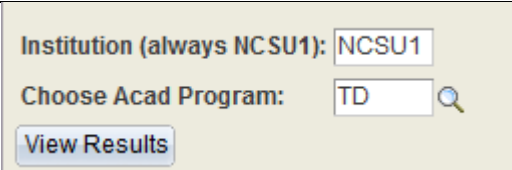
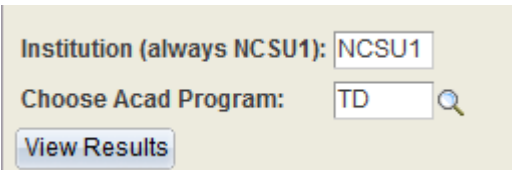
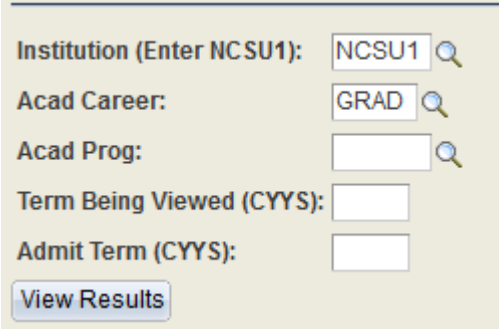
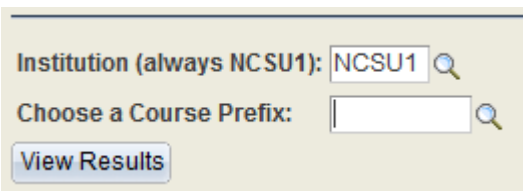
user-selected academic program and academic program status.	<p>Institution (type NCSU1): <input type="text"/> </p> <p>Academic Career: <input type="text"/> </p> <p>Academic Program: <input type="text"/> </p> <p>Acad Program Status: <input type="text"/></p> <p>View Results</p>	Graduate School
SIS_GRAD_MR_EN_ROUTE_BY_PROG Query Description: Returns a list of students in a user-selected academic program with GMOR (Grad Master On Route) program reason.	<p>This query will prompt user for Institution (NCSU1), Academic Career, and Academic Program:</p> <p>Institution (type NCSU1): <input type="text"/> </p> <p>Academic Career: <input type="text"/></p> <p>Academic Program: <input type="text"/> </p> <p>View Results</p>	Department Graduate School
GSSP_MTHLY_INSURANCE Query Description: Returns a list of students in a selected term and month that were/are continuing, being dropped and added	<p>This query will prompt user for Institution (NCSU1), Academic Career, Term of Coverage Month, Academic Program, and Coverage Month:</p> <p>Institution (type NCSU1): <input type="text"/> NCSU1 </p> <p>Academic Career (type GRAD): <input type="text"/> GRAD </p> <p>Term of Coverage Month: <input type="text"/> 2151 </p> <p>Academic Program: <input type="text"/> </p> <p>Coverge Month: <input type="text"/> May</p> <p>View Results</p>	Department Graduate School
GSSP_INS_SUMMERPREPAYS Query Description: Returns a list of GSSP students flagged for summer health insurance coverage prepayment	<p>This query will prompt user for Institution (NCSU1), Academic Career, Current Spring Term, Academic Program:</p> <p>Institution (type NCSU1): <input type="text"/> NCSU1 </p> <p>Academic Career (type GRAD): <input type="text"/> GRAD </p> <p>Current Spring Term: <input type="text"/> </p> <p>Academic Program: <input type="text"/> </p> <p>View Results</p>	Department Graduate School
SIS_GRAD_GPOW_NOT_APPRVD Query Description: List of all current active master's or doctoral students having more than 17 cumulative hours and Graduate Plan of Work not approved.	<p>This query has no user prompts.</p>	Department Graduate School

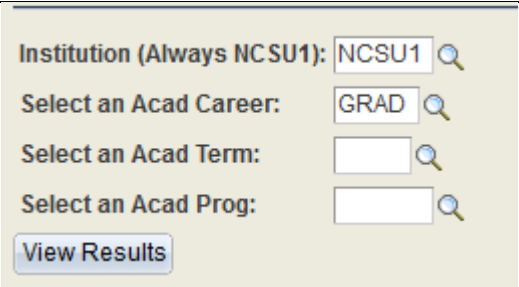
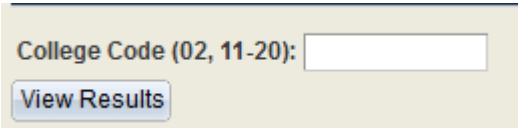
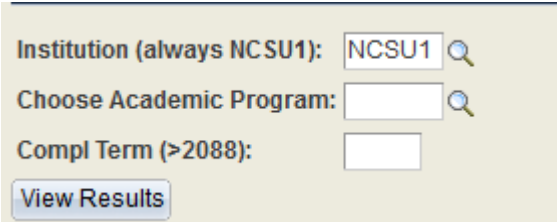
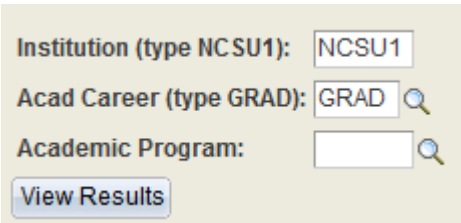
SIS_GRAD_GPOW_NOT_APPRVD_COLL Query Description: List of all current master's or doctoral students active in the user-selected academic college code having more than 17 cumulative hours and Graduate Plan of Work not approved.	This query will prompt user for the college code: 	Department Graduate School
SIS_GRAD_GPOW_NOT_APPRVD_PROG Query Description: List of all current master's or doctoral students active in the user-selected academic program having more than 17 cumulative hours and Graduate Plan of Work not approved.	This query will prompt user for Institution (NCSU1) and Academic Program: 	Department Graduate School
SIS_GRAD_DR_AT_9PLUS_YRS Query Description: List of all current doctoral students in the user-selected academic college who have been in the program 9 or more years.	This query has no user prompts.	Department Graduate School
SIS_GRAD_DR_AT_9PLUS_YRS_COLL Query Description: List of all current doctoral students in the user-selected academic college who have been in the program 9 or more years.	This query will prompt user for the college code: 	Department Graduate School
SIS_GRAD_DR_AT_9PLUS_YRS_PROG Query Description: List of all current doctoral students in the user-selected academic program who have been in the program 9 or more years.	This query will prompt user for Institution (NCSU1) and Academic Program: 	Department Graduate School
SIS_GRAD_NO_PRELIM_6YRS Query Description: List of all current doctoral students who have not scheduled their prelim 6 or more years after they started.	This query has no user prompts.	Department Graduate School

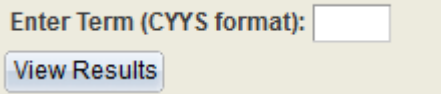
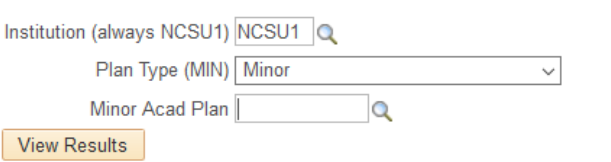
<p>SIS_GRAD_NO_PRELIM_6YRS_COLL</p> <p>Query Description: List of all current doctoral students in the user-selected academic college code who have not scheduled their prelim 6 or more years after they started.</p>	<p>This query will prompt user for the college code:</p> 	<p>Department Graduate School</p>
<p>SIS_GRAD_NO_PRELIM_6YRS_PROG</p> <p>Query Description: List of all current doctoral students in the user-selected academic program who have not scheduled their prelim 6 or more years after they started.</p>	<p>This query will prompt user for Institution (NCSU1) and Academic Program:</p> 	<p>Department Graduate School</p>
<p>SIS_GRAD_ACTIVE_BY_COLLEGE</p> <p>Query Description: Active students (enrolled or eligible to be enrolled) with demographic information for a user-selected academic career, current or future enrolled term, and college code.</p>	<p>This query will prompt user for Institution (NCSU1), Academic Career, Current/Future Enrolled Term, and College Code (02, 11-20):</p> 	<p>Department Graduate School</p>
<p>SIS_GRAD_ACTIVE_MULTIPLE_GPOW</p> <p>Query Description: Returns an alphabetized list of active grad students having more than one Graduate Plan of Work (GPoW) in the active program for a user-selected college code. Shows emplid, name, acad prog, acad plan, GPoW status, and GPoW status date.</p>	<p>This query will prompt user for the College Code (02, 11-20):</p> 	<p>Department Graduate School</p>

<p>SIS_GRAD_ACTIVE_WITH_PREV_BACH</p> <p>Query Description: Returns graduate students active in the current term and displays the school name where the student reported receiving their bachelor's degree. The user enters their college code (11-20) to get the list by college.</p>	<p>This query will prompt user for the College Code (02, 11-20):</p> 	<p>Department Graduate School</p>
<p>SIS_GRAD_PRELIM_PASS_BY_PROG</p> <p>Query Description: This query returns a list of doctoral students by user-selected academic program who passed their doctoral prelim exam (doctoral prelim milestone with either conditional pass or unconditional pass status) showing the latest "attempted date" from milestone attempt table.</p>	<p>This query will prompt user for the Institution (always NCSU1), Academic Career, (always GRAD) and Academic program:</p> 	<p>Department Graduate School</p>
<p>SIS_GRAD_ACAD_STRUC_BY_PROGRAM</p> <p>Query Description: Active graduate academic plans, programs, and subplans with descriptions and subplan type by user-selected graduate program.</p>	<p>This query has no user prompts.</p>	<p>Department Graduate School</p>
<p>SIS_GRAD_ACAD_STRUC_BY_COLLEGE</p> <p>Query Description: Active graduate academic plans, programs, and subplans with descriptions and subplan type by user-selected two-digit college code (02, then 11-20)</p>	<p>This query will prompt user for the College Code (02, 11-20):</p> 	<p>Department Graduate School</p>
<p>SIS_GRAD_DISCONTINUED_BY_PROG</p> <p>Query Description: This query returns a list of grads with a "discontinued" program action by user-selected academic program.</p>	<p>This query will prompt user for Institution (Always NCSU1) and Academic Program:</p> 	<p>Department Graduate School</p>

<p>SIS_GRAD_GPA_DROP_PROG</p> <p>Query Description: Returns active graduate students for a prompted academic term and academic program whose current GPA is >0.75 lower than their cumulative GPA.</p>	<p>This query will “prompt” you for an “academic term” value and “academic program” value. This will narrow your results to only that one term in that one program.</p>  <p>NOTE: Term is always represented by a four-digit number. Example: 2091 is Spring 2009. “2” represents the century, “09” represents the year, and “1” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_U_GRADES_PROG</p> <p>Query Description: Returns active graduate students for a prompted academic term and academic program having a "U" grade in any course. Shows active program and course information.</p>	<p>This query will “prompt” you for an “academic term” value and “academic program” value. This will narrow your results to only that one term in that one program.</p>  <p>NOTE: Term is always represented by a four-digit number. Example: 2091 is Spring 2009. “2” represents the century, “09” represents the year, and “1” represents the term: 1 for Spring, 6 for First Summer Session, 7 for Second Summer Session and 8 for Fall.</p>	<p>Department</p> <p>Graduate School</p>
<p>SIS_GRAD_DEGR_BY_PROG_W_TITLES</p> <p>Query Description: Graduation Checkout View (NC_GCO_VW) joined with ACAD_DEGR (Student Degree Table) for graduate majors, all terms after</p>	<p>This query will prompt user for Institution (Always NCSU1) and Academic Program:</p>	<p>Department</p> <p>Graduate School</p>

fall 2008, by user-selected academic program, to get approved grads for whom degrees were actually conferred. Includes an Option B, gender, ethnicity, and thesis/dissertation titles for masters & doctoral students who have one.)		
SIS_ALL_GRD_DEG_BY_PGM_W_TITLE Query Description: Union query returns all graduate students with a graduate degree conferred (both legacy and SIS) by user-selected program code. Includes an Option B, gender, ethnicity, and thesis/dissertation titles for masters & doctoral students who have one.)	This query will prompt user for Institution (Always NCSU1) and Academic Program: 	Department Graduate School
SIS_GRAD_APPL_HST_TERM_PGM_SCH Query Description: This query returns a list of historical applications (by user-selected Career, snapshot term, Admit Term, and academic program) from the historical admissions denorm table. Columns include GRE scores and most recent undergrad & grad self-reported previous institutions.	This query will prompt user for Institution (Always NCSU1), Academic Career (Always GRAD), Academic Program, Term Being Viewed, and Admit term: 	Department Graduate School
SIS_GRAD_INSTR_ADV_CRS_BY_PRF Query Description: This query returns a list of people from the instructor advisor table along with the courses they have been authorized to teach by user-selected course prefix. The list is filtered to exclude graduate faculty.	This query will prompt user for Institution (Always NCSU1) and Course Prefix: 	Department Graduate School
SIS_GRAD_LOW_GRADES_PROG Query Description:	This query will prompt user for Institution (Always NCSU1), Academic Career (always GRAD), Academic Term and Academic Program:	Department Graduate School

<p>Returns active graduate students for a prompted academic term and academic program having a C- or lower grade in any course. Shows active program and course information.</p> <p>NOTE: This query is run in Query Viewer – Production, Query Manager – Production</p>	 <p>The form contains four input fields with search icons: 'Institution (Always NCSU1):' with 'NCSU1', 'Select an Acad Career:' with 'GRAD', 'Select an Acad Term:' (empty), and 'Select an Acad Prog:' (empty). A 'View Results' button is at the bottom.</p>	
<p>SIS_ALL_GRAD_DEGREES_BY_COLL</p> <p>Query Description: Returns a list of all graduate students with a graduate degree conferred (both legacy and SIS academic terms) by user-selected college code (02, 11-20). Includes an Option B flag for those with completed Option B milestone on their record. Some records date back to the late 1990's.</p>	<p>This query will prompt user for College Code (02, 11-20):</p>  <p>The form contains one input field: 'College Code (02, 11-20):' (empty). A 'View Results' button is at the bottom.</p>	<p>Department Graduate School</p>
<p>SIS_GRAD_DEGR_PROG_GPOW_TRM</p> <p>Query Description: Returns a list of all graduate students with a graduate degree conferred (both legacy and SIS academic terms) by user-selected college code (02, 11-20). Includes an Option B flag for those with completed Option B milestone on their record. Some records date back to the late 1990's.</p>	<p>This query will prompt user for Institution (always NCSU1), Academic Program, and Completion term (after Fall 2008)</p>  <p>The form contains three input fields with search icons: 'Institution (always NCSU1):' with 'NCSU1', 'Choose Academic Program:' (empty), and 'Compl Term (>2088):' (empty). A 'View Results' button is at the bottom.</p>	<p>Department Graduate School</p>
<p>SIS_GRAD_NEW_ADMIT_TERM_BY_PGM</p> <p>Query Description: New graduate students (per admit term from program stack) for the current term by user-selected program.</p>	<p>This query will prompt user for Institution (always NCSU1), Academic Career (always GRAD), and Academic Program</p>  <p>The form contains three input fields with search icons: 'Institution (type NCSU1):' with 'NCSU1', 'Acad Career (type GRAD):' with 'GRAD', and 'Academic Program:' (empty). A 'View Results' button is at the bottom.</p>	<p>Department Graduate School</p>
<p>SIS_GRAD_A2G_ETD_CHECKLISTS</p> <p>Query Description:</p>	<p>This query will prompt user for the term, CYYS format (2171 for Spring 2017, 2178 for Fall 2017)</p>	<p>Graduate School</p>

<p>All applied to graduate (all stats except Dept Denied, College Denied, and app Withdrawn) for prompted term, showing status of their Graduate ETD checklist items (GDRCKM, GDRDAF, GDRGAL, GDRSED, GDRDPO).</p> <p>NOTE: This query is run in Query Viewer – Production, Query Manager – Production</p>		
<p>SIS_GRAD_CENSUS_ENR_MINOR</p> <p>Query Description: Returns a list of students enrolled as of census in a user-selected minor plan (shows student emplid, name, minor plan, major program, and latest term enrolled).</p>	<p>This query will prompt users for the Minor Academic Plan:</p> 	<p>Department Graduate School</p>

Recent Changes to SIS Manual

3/17/2010	Addition of Doctoral Graduation Attendance Notification Page to Student and Graduate School Sections														
3/17/2010	Revision of Graduate Certificates in DGP and Graduate School Sections														
3/17/2010	<p>Addition of queries</p> <p>SIS_GRAD_CENSUS_ENROLLMENT</p> <p>SIS_GRAD_DGP_GRDSEC_BY_LIAISON</p>														
3/17/2010	<p>Addition of Oracle Database Reporting Tables and Views</p> <table border="1" data-bbox="342 1583 992 1915"> <thead> <tr> <th>OBJECT NAME</th><th>DESCRIPTION</th></tr> </thead> <tbody> <tr> <td>ACAD_PROG</td><td>Student Academic Program Table</td></tr> <tr> <td>NC_AUD_GPW_CL</td><td>Audit SR PoW Template Derived</td></tr> <tr> <td>NC_AUD_GPW_CMNT</td><td>Audit Graduate Academic Comments</td></tr> <tr> <td>NC_AUD_GPW_CTED</td><td>Audit Committee Detail</td></tr> <tr> <td>NC_AUD_GPW_CTEH</td><td>Audit Grad Comm Header</td></tr> <tr> <td>NC_RES_CODE_TBL</td><td>Legacy Residency Codes</td></tr> </tbody> </table>	OBJECT NAME	DESCRIPTION	ACAD_PROG	Student Academic Program Table	NC_AUD_GPW_CL	Audit SR PoW Template Derived	NC_AUD_GPW_CMNT	Audit Graduate Academic Comments	NC_AUD_GPW_CTED	Audit Committee Detail	NC_AUD_GPW_CTEH	Audit Grad Comm Header	NC_RES_CODE_TBL	Legacy Residency Codes
OBJECT NAME	DESCRIPTION														
ACAD_PROG	Student Academic Program Table														
NC_AUD_GPW_CL	Audit SR PoW Template Derived														
NC_AUD_GPW_CMNT	Audit Graduate Academic Comments														
NC_AUD_GPW_CTED	Audit Committee Detail														
NC_AUD_GPW_CTEH	Audit Grad Comm Header														
NC_RES_CODE_TBL	Legacy Residency Codes														

	NC_SIS_RLUSR_VW	Security Role View
5/1/2010	Addition of queries	
	SIS_GRAD_CMT_HISTORY	
	SIS_GRAD_LOA	
7/1/2010	Addition of queries	
	SIS_GRAD_COMPLETED_THESIS	
	SIS_GRAD_DEFR	
	SIS_GRAD_LEAVE	
	SIS_GRAD_STATUS	
	SIS_GRAD_COND_PASS_6_MO	
	Add Student Comments section to Graduate Administrator & Graduate School sections	
	Add Inquiry on Student Grade Changes to Graduate Administrator & Graduate School sections	
	Addition of NC_ARC_ to Oracle Tables	
	Addition – Using Enterprise Business Intelligence Reports	
11/1/2010	Addition of queries	
	SIS_GRAD_PRELIM_SCHED	
	SIS_GRAD_PRELIM_SCHED_BY_PROG	
	SR_STUDENT_DROPS_AFTER_DATE_X	
02/1/2011	Change “Graduate Secretary” to “Graduate Services Coordinator”	
05/10/2011	Addition of ETD routing approval sections to Graduate Student, Graduate Faculty, and The Graduate School Sections	
06/01/2011	Addition of queries:	
	SIS_GRAD_ENROLLED_FULBRIGHT	
	SIS_GRAD_GPOW_STATUS	
	SIS_GRADUATE_PROVISIONAL_ADMITS	
06/01/2011	Updated Application to Graduate Screen shots to show the “Degree Requirements Check” box	
	Inserted the Vice-Chair listing in the Advisory Committee Member Types table	

- 09/01/2011 Addition of queries:**
- SIS_GRAD_APPL_HIST_TERM_PGM**
- SIS_GRAD_GCERT_COMPLETED**
- GRAD_ARCHIVE_COMM_SVC_BY_ID**
- GRAD_ARCHIVE_COMM_SVC_BY_PGM**
- 09/01/2011 Added New Graduate School Representative (GSR) Process for Doctoral Students**
- 09/01/2011 Updated GPoW Sections with:**
- **Date 1st Submitted**
 - **Members with Dual Roles**
- 09/01/2011 Addition of Comments Sections:**
- Graduate Administrators - Viewing Comments
 - Graduate School - Adding and Viewing Comments
- 09/16/2011 Addition of queries:**
- SIS_GRAD_DEGREES_WITH_CHAIR**
- 09/16/2011 Updated Move or Delete Plan of Work section**
- 10/25/2011 Addition of 18 Oracle Database Reporting Tables and Views**

OBJECT NAME	DESCRIPTION
ACAD_DEGR	Student Degree Table
ACAD_DEGR_PLAN	Student Degree Plan Table
CRSE_OFFER	Course Catalog Offerings
EXT_DEGREE	External Degrees
NC_AUD_GPW	Audit SR PoW Template Derived
NC_COMMENT_VW	Person Comment View (subset view)
NC_AUD_GRD_SPPT	Graduate Student Support Screen Audit Table

NC_CURR_TERM_VW	The Current Term
NC_GRAD_FACU_VW	Graduate Faculty View
NC_HIST_EDUC	External Education Denorm (Historical)
NC_HIST_GRE	Test Scores Denorm: GRE (Historical)
NC_HIST_TOEFL	Test Scores Denorm: TOEFL (Historical)
NC_L_SDF_09PLUS	Official Census Enrollment (SDFX summer 09 forward)
NC_L_SDF_99_09	Official Census Enrollment (SDFX thru spring 09)
OPR_GRP_3C_TBL	Operator 3C Groups
SESSION_TBL	Session Definition Table
SRVC_IND_DATA	Service Indicator Table
STDNT_GRP_S_HIST	Student Groups History Table

Edited 2 Oracle Reporting Database Tables and Views descriptions

1. SCRTY_TBL_PROG" should be "OprID Access to Acad Programs" (not "Plans")
2. "STDNT_CAR_MLSTN" should be "Student Career Milestone" (add the word "Career")

Re-added queries:

SIS_GRAD_ENROLLED_FULBRIGHT

SIS_GRAD_GPOW_STATUS

SIS_GRAD_PROVISIONAL_ADMITS

02/10/2012 Addition of queries:

SIS_GRAD_TRANSC_CHK_NEW_BY_LIA

SIS_GRAD_TRANSC_CHK_BY_LIAISON

02/15/2012 Addition of queries:

GRAD_TST_SCORE_SUPN_BDAY_GRE

GRAD_TST_SCORE_SUPN_BDAY_TOEFL

03/01/2012 Addition of queries:

	SIS_GRAD_OUTSTANDING_PATENT_AG
	SIS_GRAD_OUTSTAND_POW_PAT_AGR
02/15/2012	<p>Added the text “Query Description:” to each description that was missing it.</p> <p>Corrected query text size for consistency.</p> <p>Corrected any “query prompt” text to be above the picture for consistency.</p>
03/08/2012	<p>Addition of Patent Agreement Sections to all four SIS Manual sections.</p> <ol style="list-style-type: none"> 1. Graduate Student 2. Graduate Faculty 3. Graduate Administrators 4. Graduate School
08/21/2012	<p>Addition of queries:</p> <p>DGP_GSC_SECURITY_ALL_NOTALL_PG</p> <p>GSSP_DEPT_APPRV_BY_PROG_TERM</p> <p>SIS_GRAD_DEGREES_BY_PROG</p> <p>UCO_SERVICE_IND_REASN_TERM_PGM</p> <p>SIS_ALL_GRAD_DEGREES_BY_PROG</p> <p>Addition of Oracle Reporting Database Tables and Views descriptions</p>

ACAD_DEGR_SPLN	Student Degree Sub-Plan Table
CRSE_CATALOG	Course Catalog Data
JOBCODE_TBL	Job Code Table
NC_ACAD_PRG_STG	Legacy student academic program records

01/16/2013	<p>Addition of queries:</p> <p>SIS_GRAD_GSSP_TERM_LMT_JOBS</p> <p>SIS_GRAD_APPL_HIST_TERM_COLL</p>
------------	--

Addition of Oracle Reporting Database Tables and Views descriptions:

NC_LAB_DST_VIEW	PS_Labor SQRs Load Tbl
STDNT_CAR_TERM	Student Career Term Table

Edits to:

SIS_GRAD_APPL_HIST_TERM_PGM
ACAD DEGR
NC_ARC_COMMITTEE
NC_OPRDERN_VW
NC_ASSGN_EMP_VW
NC_SALRY_DISTR
EG_TENURE_DATA

09/11/2013**Addition of queries:**

SIS_GRAD_A2G_BELOW_B

SIS_GRAD_3_PLUS_X

SIS_GRAD_3_PLUS_X_BY_COLL

SIS_GRAD_ADVISOR_WITH_GPOW

SIS_GRAD_CENSUS_ENR_WITH_GPOW

Updated Terminate Without Prejudice section**Updated SIS_GRAD_STUD_CMTEE_PUB query text. Added the last sentence in 2 sections****Added Mass Assign Advisor section****Added Adding Good Faith (Positive Service Indicator) for Residency Purposes section****Added Student Curriculum Change section****Added this list of tables in the “Reporting Oracle Reporting Database tables and views” alphabetically.**

Table / View Name	Description
ACCOMP_TBL	Accomplishment Table (Degrees/Degree types) Note: Accessible only from the HR database.
ACCOMPLISHMENTS	Person Accomplishments Note: Accessible only from the HR database.
NC_ACAD_PLAN_GA	Graduation Plan Table
NC_CNSS_TUITION	Tuition Denorm
NC_DNRM_TUITION	Tuition Denorm (Census)
NC_EOT_TUITION	Tuition Denorm (End-of-Term)
NC_GPW_TMPLT	Plan of Work Template
NC_LAB_DST_VIEW	PS_Labor SQRs Load Table Note: Accessible only from the HR database.
STDNT_CAR_TERM	Student Career Term Table

02/21/2014

Addition of queries:

SIS_GRAD_EXAM_STATUS_LIST

Added this list of tables in the “Reporting Oracle Reporting Database tables and views” alphabetically.

Table / View Name	Description
ACAD_ORG_HR_OWN	Acad Org HR Owner Crosswalk Table
CLASS_INSTR	Course / Class Instructor Table

Added Previous Master Flag section in Grad School section.

3/13/2014

Added this table in the “Reporting Oracle Reporting Database tables and views” alphabetically.

Table / View Name	Description
ACAD_CALTRM_TBL	Academic Calendar Term Table

Added 4 new sections:

Graduate Student Support Plan (GSSP) Data

Graduate Student Support Plan (GSSP) Service Indicators

Graduate Student Support Plan (GSSP) Health Insurance Eligibility

Graduate Student Support Plan (GSSP) Data View Bill

08/15/2014 Added this list of tables in the “Reporting Oracle Reporting Database tables and views” alphabetically.

Table / View Name	Description
ACAD_CALTRM_TBL	Academic Calendar Term Table
NC_ACTV_RATAFEL	Active RA/TA/Fellowships
NC_ENR_MLSTN_LD	Current Term Masters with Milestones
NC_LOAD_EXC_TBL	Grad Load Waiver

Changed text in “Query Description” for each of the following queries. Changed text “term” to “current or future term”:

SIS_NC_SUPEREXT_GRADS
SIS_NC_SUPEREXT_BY_TERM_CAR_PG
SIS_GRAD_TERM_LMT_JOBS
SIS_GRAD_APPL_WITH_GRE_SCORES

Addition of queries:

SIS_GRAD_ENR_MLSTN_ACAD_LOAD

SIS_GRAD_EXAM_RPTS_PROG_STATUS

10/21/14 Added Curriculum Change by Department section.

12/01/2014 Addition of queries:

SIS_GRAD_ALL_SVC_IND_TERM_PROG

SIS_GRAD_DROPS_AFTER_DATE_GSSP

SIS_GRAD_COMP_REV_THES DISSERT

06/30/2015 Addition of queries:

SIS_GRAD_PROVISI_ADMITS_BY_LIA

SIS_GRAD_PROG_STATUS

SIS_GRAD_MR_EN_ROUTE_BY_PROG

GSSP_MTHLY_INSURANCE

GSSP_INS_SUMMERPREPAYS

08/31/2015 Addition of queries:

	SIS_GRAD_GPOW_NOT_APPRVD
	SIS_GRAD_GPOW_NOT_APPRVD_COLL
	SIS_GRAD_GPOW_NOT_APPRVD_PROG
	SIS_GRAD_DR_AT_9PLUS_YRS
	SIS_GRAD_DR_AT_9PLUS_YRS_COLL
	SIS_GRAD_DR_AT_9PLUS_YRS_PROG
	SIS_GRAD_NO_PRELIM_6YRS
	SIS_GRAD_NO_PRELIM_6YRS_COLL
	SIS_GRAD_NO_PRELIM_6YRS_PROG
	SIS_GRAD_ACTIVE_BY_COLLEGE
	SIS_GRAD_ACTIVE_MULTIPLE_GPOW
10/07/2015	Query Description Clarification:
	SIS_GRAD_PROVISIONAL_ADMITS
	SIS_GRAD_PROVISI_ADMITS_BY_LIA
1/30/2016	Addition of Query:
	SIS_GRAD_ACTIVE_WITH_PREV_BACH
2/05/2016	Update Query Name:
	SIS_GRAD_ADVISER_WITH_GPOW to SIS_GRAD_ADVISOR_WITH_GPOW
07/14/2016	Addition of Query:
	SIS_GRAD_PRELIM_PASS_BY_PROG

08/05/2016	Addition of Queries: SIS_GRAD_ACAD_STRUC_BY_PROGRAM SIS_GRAD_ACAD_STRUC_BY_COLLEGE SIS_GRAD_DISCONTINUED_BY_PROG
08/30/2016	Addition of Queries: SIS_GRAD_GPA_DROP_PROG SIS_GRAD_U_GRADES_PROG SIS_GRAD_DEGR_BY_PROG_W_TITLES
02/15/2017	Addition of Queries: SIS_ALL_GRD_DEG_BY_PGM_W_TITLE SIS_GRAD_APPL_HST_TERM_PGM_SCH SIS_GRAD_INSTR_ADV_CRS_BY_PRF SIS_GRAD_LOW_GRADES_PROG SIS_ALL_GRAD_DEGREES_BY_COLL
04/15/2017	Addition of Queries: SIS_GRAD_DEGR_PROG_GPOW_TRM SIS_GRAD_NEW_ADMIT_TERM_BY_PGM SIS_GRAD_A2G_ETD_CHECKLISTS
	Removal of Enterprise Business Intelligence Reports Section
10/11/2017	Addition of Queries: SIS_GRAD_CENSUS_ENR_MINOR
	Refresh navigation using homepages and tiles
11/01/2017	Adjustment of POW navigation to the Student Records tile

