Changes to Student Program, Major, Minor, or Concentration: Updating SGASTDN & SHADEGR

Banner 9

April 2018
Table of Contents

General Information ..................................................................................................................................... 1

Updating Information in SGASTDN ............................................................................................................... 1

  No Registration: Update Program in SGASTDN .......................................................................................... 1

  No Registration: Update Major in SGASTDN ........................................................................................... 6

  No Registration: Update Minor in SGASTDN ............................................................................................ 9

  No Registration: Update Concentration in SGASTDN ............................................................................. 13

Updating Information in SFAREGS .............................................................................................................. 16

  Registration Exists: Update Program in SFAREGS ................................................................................... 16

  Registration Exists: Update Major, Minor, or Concentration in SFAREGS .............................................. 19

Registration Exists: Update Program Maximum Hours in SFAREGS ........................................................... 23

Updating SHADEGR Records ....................................................................................................................... 23

  Updating SHADEGR: Roll to Outcome ..................................................................................................... 24

  Updating SHADEGR: Automated Process ............................................................................................... 25

  Updating SHADEGR: Manual Creation ................................................................................................. 25

Miscellaneous ............................................................................................................................................. 27

  SHADEGR: Miscellaneous ........................................................................................................................ 27

    Degree Sequence No Longer Sought ...................................................................................................... 27

    Holds Which Affect Graduation ............................................................................................................. 28

  Mid-Session Program Transfers .............................................................................................................. 28

  Start Afresh Students (Arts/Science) ...................................................................................................... 29

  Update SGASTDN Record ....................................................................................................................... 29

  Update SHADEGR Record ....................................................................................................................... 32

  Add Comment in SWACMNT .................................................................................................................... 34
General Information
Program changes are made on the curriculum records in SGASTDN or SFAREGS and SHADEGR. Students should have a SHADEGR record for every program they have in SGASTDN. The pairing of SGASTDN with a specific SHADEGR record allows for the correct application of courses. This more closely corresponds to baseline functioning of Aurora where a new SHADEGR record is created for changes in level, college (faculty), degree or program. Since our program codes are based on these four components, each program will have its own SHADEGR.

Students who change their Major, Minor or Concentration (without a program change) do not need a new SHADEGR but should have their existing SHADEGR updated to reflect this change.

When a program is changed in SGASTDN or SFAREGS, the Maximum Hours on SFAREGS will not automatically update. The maximum hours per term for the new program may be different than the old program. Until a permanent and automated solution is found, when updating a student’s curriculum record, ensure the new program’s maximum hours for the term are correct. See Registration Exists: Update Program Maximum Hours in SFAREGS for instruction.

Updating Information in SGASTDN
If the student does not have registration in any term after the most recent SGASTDN record, program information can be updated in SGASTDN rather than SFAREGS. If the student is registered in the term in which the change is taking place, proceed to Updating Information in SFAREGS for instruction.

No Registration: Update Program in SGASTDN
1. Go to SGASTDN
2. In the key block, enter the student number in the ID field, and click GO.
3. Click the LOOKUP [. . .] button, and select CREATE NEW EFFECTIVE TERM.

4. Enter the new Effective Term in the NEW TERM field, then select the CURRICULA tab.

5. Click UPDATE; if you know the appropriate program code, type over the existing program in the PROGRAM field. Alternatively, click the LOOKUP button [. . .] and select CHANGE CURRICULUM from the Option list.
The message below will populate:

Click OK.

6. The fields on the Curriculum record will be blank. The CHANGE CURRICULUM menu will open automatically; select the new program from the list (you can narrow down the results by filling in the CRITERIA field [ex. “02-” or “02-G”]), then click OK.
The information in the CURRICULUM section will automatically populate, with the exception of the CAMPUS field.

7. Enter the correct **campus code** in the CAMPUS field.

- If needed, update the Major/Minor/Concentration.
- If applicable, update the CATALOG TERM field (dependent on faculty regulations).

8. SAVE (bottom right corner).

A new SGASTDN record has been created; a matching SHADEGR must be created for the change in program.
9. Update or create a SHADEGR record from SGASTDN by clicking ROLL TO OUTCOME. The MANUAL LEARNER TO OUTCOME ROLL message will appear. Click YES to proceed.

The curriculum will be rolled to SHADEGR. The following message will appear confirming the applicable SHADEGR degree sequence number.
No Registration: Update Major in SGASTDN

If no registration exists in the term the change is effective, update the Major in SGASTDN. When a student declares a Major, the student’s Curriculum (or Program) Catalog Term as well as the Field of Study Catalog Term, will update to the term in which the student declared. If registration exists, proceed to Registration Exists: Update Major, Minor, or Concentration in SFAREGS.

In the key block, enter the student number in the ID field, and click GO.

1. If the term the change is taking place does not appear, click the LOOKUP [. . .] button, and select CREATE NEW EFFECTIVE TERM. If the term in which the change takes place appears in SGASTDN, locate the appropriate term, select then CURRICULA tab, then proceed to Step.4.
3. Enter the appropriate term in the NEW TERM field, then select the CURRICULA tab.

4. Click UPDATE, then change the CATALOG TERM field to the term in which the change in Major is effective.

5. Proceed to the FIELD OF STUDY section by using the Next Section arrows (bottom left corner).
6. Arrow down to a blank field or click INSERT. Note: If you are replacing an existing Major with a new Major, proceed to Step 7.
7. Tab over to the TYPE field, and click the LOOKUP [... ] button to choose Major from the LEARNER FIELD OF STUDY TYPE (GTVLFST) menu. Click OK.

8. Click the LOOKUP [... ] button next to the FIELD OF STUDY field, select ATTACHED MAJORS/DEPARTMENTS from the Option List menu.

9. Select the appropriate Major and click OK.
10. In the FIELD OF STUDY section, update the CATALOG TERM field to the term in which the change in Major is effective.

![FIELD OF STUDY](image)

11. SAVE (bottom right corner).
12. Update the SHADEGR record from SGASTDN using the ROLL TO OUTCOME button. Click the Previous Section arrow (bottom left corner) to move from the FIELD OF STUDY section to the CURRICULUM section.

![CURRICULUM](image)

No Registration: Update Minor in SGASTDN

Unlike declaring a Major, when a student declares a Minor or Concentration in Banner, the Catalog Term is not affected.

If registration exists, proceed to **Registration Exists: Update Major, Minor, or Concentration in SFAREGS**.

If no registration exists in the term the Minor is being changed, proceed to SGASTDN.

1. In the key block, enter the **student number** in the ID field, and click GO.

![SGASTDN](image)
2. If the term the change is taking place does not appear, click the LOOKUP [ . . . ] button, and select CREATE NEW EFFECTIVE TERM. If the term in which the change takes place appears in SGASTDN, locate the appropriate term, select then CURRICULA tab, then proceed to Step.4.

3. Enter the appropriate term in the NEW TERM field, then select the CURRICULA tab.

4. In the CURRICULUM section, click UPDATE.
5. Proceed to the FIELD OF STUDY section by clicking the **Next Section** arrow (bottom left corner).
6. Arrow down to a blank line or click insert.

**Note:** If you are replacing an existing Minor with a new Minor, highlight the applicable line, proceed to Step 8.

7. Tab over to the TYPE field, and click the LOOKUP [. . .] button, and choose **Minor** from the LEARNER FIELD OF STUDY TYPE (GTVLFST) menu. Click OK.
8. Click the LOOKUP [ . . . ] button next to the FIELD OF STUDY tab and select ATTACHED MINORS to find a list of Minors associated with the student’s program.

9. Select the appropriate Minor from the menu; click OK, then SAVE (bottom right corner).

Note: The CATALOG TERM field (under Field of Study) will update automatically to the term in which the student declared their Minor. This does not affect the Program Curriculum’s catalog term.
10. Update the SHADEGR record from SGASTDN using the ROLL TO OUTCOME button. Click the Previous Section arrow (bottom left corner) to move from the FIELD OF STUDY section to the CURRICULUM section.

No Registration: Update Concentration in SGASTDN
If registration exists, proceed to Registration Exists: Update Major, Minor, or Concentration in SFAREGS. If no registration exists in the term the Concentration is being changed, proceed to SGASTDN.

1. In the key block, enter the student number in the ID field, and click GO.
2. If the term in which the change is taking place does not exist, then click the LOOKUP [ . . . ] button and select CREATE NEW EFFECTIVE TERM. If the term in which the change takes place exists, locate the appropriate term, then select the CURRICULA tab and proceed to Step 4.

3. Enter the appropriate term in the NEW TERM field, then select the CURRICULA tab.

4. In the CURRICULUM section, click UPDATE.
5. Proceed to the FIELD OF STUDY section by clicking the **Next Section** arrow (bottom left corner).

6. Arrow down to a blank line or click insert. *Note: If you are replacing an existing Concentration with a new Concentration, highlight the applicable line, then proceed to Step 8.*

7. Tab over to the TYPE field, and click the LOOKUP [...] button to choose **Concentration** from the LEARNER FIELD OF STUDY TYPE (GTVLFST) menu. Click OK.

8. Click the LOOKUP [...] button next to the FIELD OF STUDY tab and select ATTACHED CONCENTRATIONS to find a list of Concentrations associated with the student’s program.
9. Select the appropriate Concentration from the menu, click OK and SAVE (bottom right corner).

**Note:** The CATALOG TERM field (under Field of Study) will update automatically to the term in which the student declared their Minor. This does not affect the Program Curriculum’s catalog term.

10. Update the SHADEGR record from SGASTDN using the ROLL TO OUTCOME button. Click the Previous Section arrow (bottom left corner) to move from the FIELD OF STUDY section to the CURRICULUM section.

### Updating Information in SFAREGS

If a student has registration after the Effective Term of the most recent SGASTDN record, then information must be updated in SFAREGS. If you attempt to CREATE NEW EFFECTIVE TERM and UPDATE when registration exists, the following message will appear (top right corner):

**Registration Exists: Update Program in SFAREGS**

1. Go to SFAREGS.
2. In the Key Block, enter the **term** in which the program change is being made in the TERM field and the **student number** in the ID field.
3. Select the CURRICULA tab, then click UPDATE.

![Curriculum Tab](image1)

The term indicated in the Key Block will populate in the TERM field.

4. Click the LOOKUP [. . .] button next to the PROGRAM field and select CHANGE CURRICULUM from the Option List.

![Program Lookup](image2)

The message below will populate, click OK.

![Message Populating](image3)
5. The fields on the Curriculum record will be blank. The CHANGE CURRICULUM menu will open automatically; select the new program from the list. Alternatively, you can narrow down the results by filling in the CRITERIA field (ex. “01-” or “01-H”), then click OK.

6. The LEVEL field will automatically populate. Enter the appropriate campus in the CAMPUS field.

7. SAVE (bottom right corner).
   - If needed, update the Major/Minor/Concentration.
   - If applicable, update the CATALOG TERM field (dependent on faculty regulations).
A new SGASTDN record has been created; a matching SHADEGR must be created for the change in program.

8. Update or create a SHADEGR record from SGASTDN by clicking ROLL TO OUTCOME. The MANUAL LEARNER TO OUTCOME ROLL message will appear. Click YES to proceed.

The curriculum will be rolled to SHADEGR. The following message will appear confirming the applicable SHADEGR degree sequence number.

Registration Exists: Update Major, Minor, or Concentration in SFAREGS
When a student is registered in the term the change is to take place, the information must be updated in SFAREGS (in the applicable term) rather than SGASTDN.

1. Go to SFAREGS.
2. In the Key Block, enter the term in the TERM field and the student number in the ID field; click GO.

3. Select the CURRICULA tab, then click UPDATE.
4. Change the Curriculum – CATALOG TERM field
5. Use the Next Section arrow (bottom left corner) to move to the FIELD OF STUDY section.
6. Update the Field of Study – CATALOG field.
7. Arrow down to a blank field or click INSERT.

8. Fill in the TYPE field with Major, Minor, or Concentration.
9. Click the LOOKUP [. . .] button in the FIELD OF STUDY field.

   a. To update Major: Select ATTACHED MAJORS/DEPARTMENTS from the Option List, and choose the appropriate Major. Click OK; SAVE.

   b. To update Minor: Select ATTACHED MINORS from the Option List, and choose the applicable minor. Click OK, then SAVE.
c. To update Concentration: Select ATTACHED MINORS from the Option List, and choose the applicable minor. Click OK, then SAVE.
Registration Exists: Update Program Maximum Hours in SFAREGS

When a program is changed in SGASTDN or SFAREGS, the Maximum Hours in SFAREGS will not update automatically. The maximum hours per term for the new program may be different than the previous program.

When changing a program, check the MAXIMUM field under the ENROLLMENT INFORMATION section in SFAREGS. If the Maximum Hours differ, they will need to be updated.

Prior to registration, a student’s maximum hours are 999.99. The maximum hours will change to the correct hours after a student registers for the first time. Students in a program or faculty in which no Maximum Hours Rules are defined, will be assigned the default value of 15 credit hours per term.

An update is run once annually, prior to the opening of Fall/Winter registration. At that time, the process will update Maximum Hours for any student who has changed programs.

If you have changed a student’s maximum hours on an exception basis prior to this update, your change will be overwritten by this automated process and will have to be re-entered.

After the automated update is run each year the maximum hours must be verified and updated if necessary as per this protocol whenever you make a change to a student’s program on SGASTDN or SFAREGS.

Members of the Advisor/Registrar’s Office Network will be informed by email when the Maximum Hours Update is run.

Updating SHADEGR Records

Students must have a SHADEGR record for every program that exists in SGASTDN. The pairing of SGASTDN with a specific SHADEGR allows for the correct application of institution courses, transfer credit, and the calculation of a Degree GPA. Mismatched information in SGASTDN and SHADEGR can cause confusion when the information is viewed on INB or Aurora Self-Service. When program changes are made in SGASTDN, the SHADEGR record is affected in one of the following ways:

- Updating a Major, Minor, or Concentration will not require a new SHADEGR record. The existing SHADEGR record for the program must be updated to reflect the change.
• Admission to a new faculty or new program (i.e. program change) will require a new SHADEGR record.

Note: University 1 students transiting to Arts or Science in Aurora Self-Service have a new SHADEGR created automatically. All courses previously applied in University 1 will be applied to the new degree sequence.

SHADEGR records can be updated/created in one of three ways:

• Roll to Outcome
• Automated Process
• Manual Creation

Updating SHADEGR: Roll to Outcome
1. In SGASTDN, after program changes are made, click the ROLL TO OUTCOME button.

The following message will appear:

2. Click YES.
The curriculum will roll to SHADEGR. The existing SHADEGR is updated or a new SHADEGR is created. The following message will appear, confirming the applicable SHADEGR Sequence Number:

Updating SHADEGR: Automated Process
A SHADEGR will be updated or created by a process run within the Registrar’s Office. This will take place after the revision deadline in Fall/Winter terms; this will update or create SHADEGR records where appropriate. No action is required by the faculties to create/update the SHADEGRs. Faculties will be notified by email when the process is complete so courses can be applied.

Updating SHADEGR: Manual Creation
A SHADEGR can be created manually. Although this option does exist, please use the ROLL TO OUTCOME button on SGASTDN or allow the process to be run by the Registrar’s Office.

1. Go to SHADEGR
2. Enter in the Student ID. Click the LOOKUP [. . .] button beside Degree Sequence.
3. Review the existing SHADEGR Sequence Numbers, looking for the next available number. (Ex. Next available Sequence Number in picture below is 3), then click the X to return to SHADEGR.
4. Enter the next available Sequence Number in the DEGREE SEQUENCE field. Click GO.

5. Enter the **Outcome Status** in the OUTCOME STATUS field or click the LOOKUP [...] button to select the status from the Degree Status Code Validation (STVDEGS) list. Click OK.

6. Enter the new Effective Term for the updates made in the STUDENT RECORD TERM field.
7. Select the CURRICULA tab. In the CURRICULUM section, enter the **program** and **campus** into the corresponding fields to reflect the changes made in SGASTDN. The LEVEL field will automatically populate.

8. In the FIELD OF STUDY section, enter the Major/Minor/Concentration **TYPE** and update the FIELD OF STUDY field to reflect changes made in SGASTDN.

9. Update the CATALOG field if applicable.

10. SAVE (bottom right corner).

### Miscellaneous

**SHADEGR: Miscellaneous**

Apply courses and transfer credit to the new SHADEGR. Only apply courses and transfer credit if the level is applicable to the program and Degree GPA being updated.

If the SHADEGR record is not created or updated by one of the methods above, the SHADEGR will be created/updated on the first grade roll. When a SHADEGR record is created by a grade roll, no notification is available to faculty. As a result, courses applied to the previous SHADEGR sequence will not be applied to the new Degree Sequence, resulting in multiple sought degrees with incorrect application of courses.

**Degree Sequence No Longer Sought**

In general, students should have only one degree sequence record (SHADEGR) with a status of SO – Sought. However, students who change programs will have two degree sequences with Sought status for a period of time. After the revision deadline in Fall and Winter Terms, the Registrar’s Office will run a process that changes the oldest SHADEGR with status SO to status NS – No longer Seeking, leaving the current SHADEGR record with status SO.
Holds Which Affect Graduation

If a student has a hold affecting graduation, the following error will appear when accessing SHADEGR:

*ERROR* Student has holds which prohibit graduation-related activities.
Must enter 'Y' before proceeding to next block.

The hold can be overridden by entering Y in the OVERRIDE HOLD field.

The following holds affect graduation:

- DA – Discipline Pending
- DH – Discipline Hold
- DI – Under Discipline Investigation

Mid-Session Program Transfers

Students allowed to transfer programs in the middle of term spanning courses need to be manually reviewed at the end of term to ensure their courses are applied correctly in SHADEGR. Once the first Winter Term grade rolls, and is applied in the new SO-SHADEGR, the “No Longer Sought” process will prevent courses from the 'Part A' term from being applied to the old NS-SHADEGR. This process may take place as early as the end of Revision Period for the Part A term (when a VW is incurred in the term spanning course). Therefore, these students should be put in a ‘Bring Forward’ file for review at the end of the term spanning session (i.e. Fall/Winter, Winter/Summer) to ensure courses for these time periods were correctly applied to the affected SHADEGRs. This issue arises when a student changes faculty or changes program within a faculty.

Examples:

- A General Science (02-G) student is allowed to do a mid-session transfer to the Honours program (02-H). The student has a term spanning course over the Fall Term and Winter Term. When the term spanning course is graded, the NS code is placed on the 02-G – SHADEGR. Any subsequent Fall Term grade(s) will not be applied to the 02-G – SHADEGR. The review at the end of Fall Term and Winter Term ensures the appropriate courses are applied to either the NS - 02-G – SHADEGR or the 02-H – SHADEGR.

- A student is in the Advanced – Arts program for the 201790 term, but is required to withdraw in 201810. The newly created SGASTDN record will be effective for 201810, and will reflect the new General program. SHADEGR must be updated to reflect the program change. When grades are rolled for 201810, Aurora looks for an Advanced Program – SHADEGR corresponding with the 201810 SGASTDN record. Aurora will not find an appropriate SHADEGR and will create a new General Program SHADEGR because the SHADEGR was changed to correspond with the new
General Program. The student record will contain multiple Sought Degrees for the same faculty with the incorrect application of courses to the SHADEGR. Therefore, the multiple SHADEGR records require clean-up by the faculty (in consultation with the Records Advisor, if necessary).

Start Afresh Students (Arts/Science)

Update SGASTDN Record

1. Go to SGASTDN. Enter the student number in the ID field, leave the TERM field blank, and click GO.

2. Click the LOOKUP [. . .] button next to the NEW TERM field and select CREATE NEW EFFECTIVE TERM.

3. Enter the start afresh term in the NEW TERM field.
4. Update the STUDENT STATUS field to AS (Active).
5. Select the CURRICULA tab.

Note: Specific faculty policy dictates whether or not the CATALOG TERM and/or the ADMIT TERM will need to be updated. If no changes are required, proceed to step 9.
6. Click **UPDATE**.
7. To update the **CATALOG TERM**, type over the existing catalog term with the correct term.

![Catalog Term Update](image1.png)

8. To update the **admit term**, select the **STATUS DETAILS** tab and type over the existing **ADMISSION TERM** with the correct term.

![Admission Term Update](image2.png)

9. If needed, update the **Major/Minor**. Click **Next Section** arrow (bottom left corner) to navigate to the **FIELD OF STUDY** section.
10. Type the **Major/Minor code** in the **FIELD OF STUDY** field. Alternatively, click the **LOOKUP [ . . .]** button to view attached Major/Minor codes.

![Major/Minor Update](image3.png)

11. Click **SAVE** (bottom right corner).
12. Use the Previous Section arrow (bottom left corner) to navigate to the CURRICULUM section. Click ROLL TO OUTCOME button.

The following message will appear:

Manual Learner to Outcome Roll
The following operation cannot be undone. Do you wish to continue?

Yes  No

13. Click YES.

14. Select the ACADEMIC AND GRADUATION STATUS, DUAL DEGREE tab.

15. In the ACADEMIC STANDING OVERRIDE field, enter the appropriate Academic Standing Override, allowing the student to register for the specified term.

16. If applicable, repeat all steps to update the SGASTDN record for Winter Term. Normally, a new SGASTDN record is not created for students who are returning and continuing in the same program, major, minor, etc. However, if the Academic Standing Override is done in the Fall Term, the existing Academic Status for Winter Term is not affected. The status for Winter Term is not affected, and therefore, an Academic Standing Override for Winter Term will be required to allow registration. A new SGASTDN record will need to be created.
Update SHADEGR Record

1. Enter the **student number** in the ID field. Click the LOOKUP [. . .] button to navigate to the Degree Summary (SHADGMQ), which displays degree information in the LEARNER OUTCOME SUMMARY SECTION.

2. Double click the Sequence Number corresponding to the *old degree*.

3. Click GO.
4. Change the OUTCOME STATUS from SO (Sought) to NS (No Longer Sought).

5. SAVE (bottom right corner).

6. If applicable, apply courses to new degree.
   a. Click START OVER (top right corner).
   b. Enter the Degree Sequence Number for current degree. Click GO.
   c. Select the INSTITUTIONAL COURSES tab.
   d. Check all applicable courses in the APPLY TO LEARNER OUTCOME section.
   e. SAVE.
Add Comment in SWACMNT
In SWACMNT, enter the **student number** in the ID field, and the **term** for which the comment is applicable in the TERM field, then click GO.

1. Enter **SA** in the COMMENT TYPE field and the appropriate **faculty code** in the ORIGINATOR field.
2. Enter **Start Afresh** in the COMMENTS field.
3. SAVE.

4. Click INSERT to add a 2\textsuperscript{nd} comment.
5. Enter **TOP** in the COMMENT TYPE field.

*Note: TOP comments will appear on official transcript and on Aurora web transcript.*
6. Enter the appropriate **faculty code** in the ORIGINATOR field.
7. Enter **Student allowed to Start Afresh** in the COMMENTS field.
8. SAVE.