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

BANNER 8

Revised (January 2018)
Scope:  Student Advisors, Registrar’s Office
Purpose:  Instructions for updating SGASTDN and SHADEGR

General Information
Students’ program changes are made on the curriculum records of 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 should allow 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.

Note:  with the upgrade to Banner 8, when an existing student’s program is changed on SGASTDN or SFAREGS, their Maximum Hours on SFAREGS will not automatically update. The maximum hours per term for the new program may be different than for the old program. Until a permanent and automated solution is found, when updating a student’s curriculum record you must also check that the new program’s maximum hours for the term are correct. See the instructions for this following the examples below: Confirm Program Maximum Hours and Update if Required.

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1. Updating a student’s program in SGASTDN in a term without registration:
   (Note: “without registration” means that the student has no registration since the New Term on the most recent SGASTDN record.)

   - Go to SGASTDN
   - Select the dropdown arrow on the New Term field
   - Select Create New Effective Term

   Enter the new effective term
- Go to the Curricula tab
- Select Update

Select the dropdown arrow beside the Program field
- Select Change Curriculum
- Notification that “Base Curriculum Items will be Replaced” will be displayed
- Select OK

- The fields on the Curriculum record will be blanked out and the Change Curriculum dropdown list will open
- Select the student’s new program
- The curriculum fields will be populated, except campus
- Enter Campus

Go to the Field of Study tab
• **Make any necessary changes to major/minor/concentration** using the list provided when you select the dropdown arrows
• **Update catalog term if applicable** (dependent on faculty regulations)

Roll to Outcome
Update or create a SHADEGR record from SGASTDN using the **Roll to Outcome** button:

Respond **Yes** to the prompt:

The curriculum will be rolled to SHADEGR – either the existing SHADEGR will be updated or a new SHADEGR created. The applicable SHADEGR sequence number will be displayed. Apply courses to the new SHADEGR.
See SHADEGR below for further information

- Check the student’s Maximum Hours for the new program (see Confirm Maximum Hours below)

### 2. Updating a student’s major in SGASTDN

(Student has no registration activity in the term the change is effective):

In the spring of 2016, the following changes were made to the online Major Declaration customization: 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.

**Note:** Any changes made manually should reflect the same.

**Example:** Student was admitted in 201590, to the Arts-General degree program. At the time, student declared Criminology as a Major but now wishes to declare Sociology, effective 201790.

- Go to **SGASTDN**
  - If the term in which the student is declaring (in this example 201790), exists in SGASTDN, go to the **Curricula Tab**.
  - OR
  - If the term in which the student is declaring does not exist in SGASTDN, select the **dropdown arrow on the New Term field** and select **Create New Effective Term**, enter in the new Effective Term, SAVE. Go to the **Curricula Tab**.
• In the Curricula Tab, click on Update

  o Update the Catalog Term to the term in which the change of major is effective (in this example, 201790).
• Click on the Field of Study Tab
  
  o Update the Catalog Term to the term in which the change of major is effective (in this example, 201790).
  o SAVE.

![Diagram of Field of Study Tab]

• Update the SHADEGR record from SGASTDN/Curriculum using the Roll to Outcome button:

![Diagram of Roll to Outcome button]

a) Updating a Student’s Minor in SGASTDN

Unlike declaring a Major, when a student declares a Minor or Concentration in Banner, it does not affect their Curriculum (or Program) Catalog Term in the Curricula Tab. Therefore, when updating a Minor or Concentration in Banner, Program Catalog Term in the Curricula Tab, does not change.

• Go to SGASTDN
  
  o If the term in which the student is declaring (For example 201790), exists in SGASTDN, go to the Curricula Tab.

OR
If the term in which the student is declaring does not exist in SGASTDN, select the **dropdown arrow on the New Term field** and select **Create New Effective Term**, enter in the new Effective Term, SAVE. Go to the **Curricula Tab**.

- In the **Curricula Tab**, click on **Update**
- Click on the **Field of Study Tab**
  - Arrow down to a blank section and entire **Type: Minor**
  - Click on the down arrow next to Field of Study, and Click on Attached Minors
    (Here you will find a list of only the possible Minors associated with the students’ program
  - Choose the desired Minor and SAVE.
  **Note**: The Field of Study Catalog Term will also update to the term in which the student declared their Minor. **This does not affect the Program Curriculum’s catalog term**.

Update the SHADEGR record from SGASTDN/Curriculum using the **Roll to Outcome** button:
b) Updating a Student’s Concentration in SGASTDN

- Go to SGASTDN
  - If the term in which the student is declaring (For example 201790), exists in SGASTDN, go to the Curricula Tab.
  - OR
    - If the term in which the student is declaring does not exist in SGASTDN, select the dropdown arrow on the New Term field and select Create New Effective Term, enter in the new Effective Term, SAVE. Go to the Curricula Tab.
- In the Curricula Tab, click on Update
- Click on the Field of Study Tab
  - Arrow down to a blank section and entire Type: Concentration
  - Click on the down arrow next to Field of Study, and Click on Attached Concentrations (Here you will find a list of only the possible Concentrations associated with the students’ program
  - Choose the desired Concentration and SAVE.
    - Note: The Field of Study Catalog Term will also update to the term in which the student declared their Concentration. This does not affect the Program Curriculum’s catalog term.
- Update the SHADEGR record from SGASTDN/Curriculum using the Roll to Outcome button:

3. Updating a student’s program in SFAREGS where registration exists:

If student has had registration activity since the effective term of the most recent SGASTDN, the changes must be made in SFAREGS. If trying to ‘Create a New Effective Term’ and ‘Update’ the Curriculum in SGASTDN, the error ‘Registration Exists, must make changes in the Registration Form’ will be displayed.
- Go to SFAREGS
- In the key block enter the term for which the update is being made
- Go to the Curricula tab

- Select Update
- The term entered in the key block will populate in the Term field

- Select the dropdown arrow beside the Program field
- Select Change Curriculum
- Select OK

- The fields on the Curriculum record will be blanked out and the Change Curriculum dropdown list will open.
• Select the student’s new program

• Enter Campus M
• Go to Field of Study
• Make any **necessary changes to major/minor/concentration** using the list provided when you select the dropdown arrows
• Update **catalog term if applicable** (dependent on faculty regulations)

![Field of Study image]

- **Save**
- A new SGASTDN record will have been created

![SGASTDN image]

- A matching SHADEGR must be created for the change in program

- **Roll to Outcome**
  Update or create a SHADEGR record from SGASTDN using the **Roll to Outcome** button:
Respond Yes to the prompt:

The curriculum will be rolled to SHADEGR – either the existing SHADEGR will be updated or a new SHADEGR created. The applicable SHADEGR sequence number will be displayed. Apply courses to the new SHADEGR.

See section on SHADEGR for more information.

- Check the student’s Maximum Hours for the new program (see Confirm Maximum Hours below)

4. Updating a student's major, minor or concentration in SFAREGS

- Follow Step 3 to access SFAREGS
- Continue making changes in Curricula Tab as outlined in Step 2

5. Confirm Program Maximum Hours and Update if Required

In Banner 8 when a student’s program is changed in SGASTDN or SFAREGS, their Maximum Hours in SFAREGS will not update automatically. The maximum hours per term for the new program may be different than that of the old program.

- When making a change to a student’s program in SGASTDN or SFAREGS, check the Maximum Hours field in the Enrollment Information block in SFAREGS.
• **Update the Maximum Hours field** in the Enrollment Information block on SFAREGS if necessary (i.e. if max hours for the new program is more or less than the old program).

• **Save**

**Note**
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.

6. **SHADEGR**
Students must have a SHADEGR record for every program they have in SGASTDN. The pairing of SGASTDN with a specific SHADEGR allows for the correct application of institution courses and transfer credit, and the calculation of a student’s 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:

- If a change is made to a student’s major, minor, or concentration, a new SHADEGR record is not required. Instead, the existing SHADEGR record for the program must be updated to reflect the change.
- If a student’s program is changed (i.e., admission to a new faculty or change to a new program within the same faculty), a new SHADEGR record is required.

University 1 students who transit to Arts or Science through Aurora Self-Service will 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 or created in 3 ways:

1. **Roll to Outcome**
   Update or create a SHADEGR record from SGASTDN using the Roll to Outcome button:

   The curriculum will be rolled to SHADEGR – either the existing SHADEGR will be updated or a new SHADEGR created. The applicable SHADEGR sequence number will be displayed. Apply courses to the new SHADEGR.

2. **Automated Process**
   SHADEGRs will be updated or created by a process run by the Registrar’s Office, after the revision deadline in fall and winter terms. This will update or create SHADEGR records where necessary. No action is required by the faculties to create or update the SHADEGRs. Faculties will be notified by email when the process is complete so courses can be applied.

3. **Manual Creation**
SHADEGRS can be created manually. Although this option exists, using the Roll to Outcome button on SGASTDN or allowing the process to be run by the Registrar’s Office are the preferred options.

- Go to SHADEGR, Select the Degree Sequence dropdown arrow
- Review the existing SHADEGR sequence numbers
- Go back to the SHADEGR from
- Enter the next Sequence Number in the Degree Sequence field
- Next Block
- Enter the Outcome Status and Student Record Term (the new effective term for the updates made)

- Go to the Curriculum Tab
- Enter the new program information and campus, as on the new SGASTDN record
- Go to the **Field of Study Tab**
- **Add the applicable major/minor/concentration**, as on the new SGASTDN record
- **Update catalog term if applicable**, as on the new SGASTDN record

- **Save**
- **Apply courses and transfer credit** to the new SHADEGR. Only apply courses and transfer credit where the level is applicable to the program and Degree GPA being updated.
If a SHADEGR record is not created or updated by any of the methods above, it will be created/updated on the first grade roll. There is no notification to the faculty when a SHADEGR record is created by a grade roll. As a result, the courses applied to the previous SHADEGR sequence will not be applied to the new degree sequence. The student will have multiple sought degrees with incorrect application of courses.

**Degree Sequences No Longer Sought**

Generally, students should have only one degree sequence record (SHADEGR) with status Sought (SO). 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 will change the oldest SHADEGR with status SO to status NS – No Longer Seeking. This will leave their current SHADEG record with status SO.

**Holds Which Affect Graduation**

If a student has a hold that affects graduation, the error *Student has holds which prohibit graduation-related activities* will be displayed when accessing SHADEGR.

The following holds affect graduation:

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

You can still access the SHADEGR record and make changes by overriding the hold in the key block.
• Make the required changes
• Save

**Specific Examples of SGASTDN/SHADEGR Updates**

1 - Mid-Session Program Transfers

Students who are allowed to transfer programs while in the middle of term spanning courses need to be manually reviewed at the end of term to ensure that their courses have been applied correctly in SHADEGR. When the first winter 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 could be as early as the end of the revision period in PART A term (when a VW is incurred in the term spanning course). As a result, these students should be put in a “bring forward” file for review at the end of the term spanning terms (fall-winter, winter-summer) to ensure that courses for these time periods have been correctly applied to the affected SHADEGR’s. This issue will arise when a student moves from program to program within the same faculty or between faculties.

For example ...

A general Science student (02-G) is allowed to do a mid-session transfer to the honours program (02-H). They have a term spanning course over fall-winter. Whenever the term spanning course gets graded, the NS code will be placed on the 02-G SHADEGR. This means that any subsequent fall term grades will not be applied to the 02-G SHADEGR. The review at the end of fall and winter ensures that the appropriate courses are applied to the No Longer Sought 02-G SHADEGR and the new 02-H SHADEGR.
A student is in the Advanced Program in the Faculty of Arts in 201490 but is required to withdraw for 201510. The newly created SGASTDN record will be effective for 201510 and will reflect the new General program. SHADEGR must also be updated to reflect the program change.

- When the grades are rolled for 201510, Aurora will look for an Advanced Program SHADEGR to correspond with the 201510 SGASTDN record.
- Since the SHADEGR has been changed to correspond with the new General Program, Aurora will not find an appropriate SHADEGR and will create a new General Program SHADEGR.
- The student record will have multiple sought degrees for the same faculty with the incorrect application of courses to the SHADEGR. The multiple SHADEGR records will require clean-up by the faculty, in consultation with the Record’s Advisor if necessary.

2 - Start Afresh Students (Faculties of Arts and Science)
For students allowed to start afresh, below are the steps to update the student’s record:

1 - SGASTDN
- Create a new SGASTDN record for the beginning of the start afresh period
  - Enter the effective term in the key block, next block
  - Click on record menu, click on duplicate
- Update catalog term and admit term according to faculty policy (whether the catalog and admit terms remain the same as when the student was first admitted to the faculty or do the catalog and admit terms change to the effective term the student is allowed to start afresh)
- Activate the student status
- “Update” the Curriculum record so that the “Rolled to Outcome” field is blank. This will allow the system to associate the start afresh time period with a new SHADEGR.
- Update major/minor if necessary
- Enter an academic assessment override to allow the student to register for a specified term. If the student should be able to register for more than one term, another SGASTDN with the subsequent effective term is required with the override applied to it as well.

2 - SHADEGR
- Change the old SHADEGR status to NS – No Longer Sought.
- Create a new SO SHADEGR using the ‘Roll to Outcome’ button.
- Apply courses (if applicable).

3 - SWACMNT
- Enter a “SA – Start Afresh” comment for the effective term. This will allow for reporting of these students.
- Enter a “TOP” comment to indicate that the student has been allowed to start afresh. Indicate any other conditions that may be applicable. Top comments will appear on the official transcript and on the Aurora web transcripts.