UM Achieve
Exceptions Protocol

Revised (November 29, 2017)
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Introduction
Course exceptions will be required in UM Achieve for students for which an exception to the curriculum in the Academic Calendar has been made by an advisor. There are six different types of course exceptions that can be made to a student’s audit. The following guide will take you through the differences between each exception and the steps to successfully perform them.
Please note that exceptions should not be performed on in-progress courses.

Course Mask
The course mask is the template of format for each course entered. It is made up of the department abbreviation and the course number. The input is case sensitive and will require spaces if needed. The formatting for any courses entered in an exception must be precise, or the exception won’t work properly. Please follow the course masks below for inputting exceptions.

<table>
<thead>
<tr>
<th>Legacy Course Mask:</th>
<th>###[space]###</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example:</td>
<td>052 091</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current Course Mask:</th>
<th>AAAA1234</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AAA[space]1234</td>
</tr>
<tr>
<td></td>
<td>AA[2spaces]1234</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Example:</th>
<th>PSYC1200</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SOC 1200</td>
</tr>
<tr>
<td></td>
<td>FA 1020</td>
</tr>
</tbody>
</table>

Course Substitution Exception (CS)
This exception is used for a true one course to one course relationship. This exception will use a course a student has taken, and replace it with another course identity anywhere where it can be placed in the audit.
You may also use this exception for unallocated transfer credits.
This exception is available by clicking on the “Exceptions” tab.

Example Scenario: Advisor needs HIST 1380 to be recognized as ENGL 1400 in the audit.
Step 1: From the audit, copy the Program code on the top of the page.
Step 2: In the “Exceptions” tab, click on the “Add Exception” button.

Step 3: Click on the “Course Substitution” exception description.

Step 4: Using the specific course masks, insert the following information and click the save button.

**Add Course Substitution**

- **UM Achieve Program Code**: Paste the program code from the audit into this field. This will restrict the exception for this student to this specific program.
- **Course Taken by Student**: Enter the course in the student’s history.
- **Year/Term**: You must enter the term for the course that is in the student’s history unless it is a legacy course.
- **Substituted Course**: Enter the course for which the one above will replace. You may even use generic subject areas such as MATH**** if necessary.
- **Message displayed on audit**: An optional 23-character message to display next to the course.
- **Memo**: This optional memo will only display in the “Applied Exceptions” tab, not on the audit.
- **Authorized By**: Enter the name of the authorizer.
- **Date**: Enter the date for which the exception was authorized.
Step 4: You must run the audit again to view the applied exception. Click the “Audit” tab and then “Request New”. Run the same audit as you did originally (either a What-if or the student’s own program).

Step 5: The audit will now place the original course, anywhere the substituted course can be applied.

Force Course Exception (C9)
The Force Course exception is used for a one course to two courses, or two courses to one course relationship. This exception will use a course a student has taken, and replace it with a set of courses in a specific spot in the audit. Alternatively, this exception will use a set courses a student has taken and replace it with a course in a specific spot in the audit.

You must always use the Force Course exception with the Remove Course exception when necessary. Further instructions are below.

This exception is available by clicking on the “Enter Exception Mode” button on the top right of an audit.

If the course exceeds the original credit hours needed, please see the scenario on page 11.
Example 1 Course to 2 Courses Scenario:
Advisor needs a course in the student’s history to replace a required BIOL 1020 & BIOL 1030 set.

Step 1: In Exception Mode, click the expand arrow for the requirement you would like to make the exception.

Step 2: Click the orange button beside the desired sub-requirement.

Step 3: Select the course you would like to take the place of the other two by clicking the green button.

Step 4: Confirm the course and click Next.

Step 5: Ensure the “Restrict to this Degree Program” check box is checked. Fill in the Audit Note, Authorized by and Date fields. When done, click “Save & Run Audit” to see the exception take place.
Step 6: The course will now be in the requirement you forced it into with your note displaying underneath the course title.

Example 2 Courses to 1 Course Scenario:
Advisor needs two courses to replace a required LING 1200 course.

Step 1: Perform steps 1 through 5 from the previous scenario for the first course.

*Tip: For Step 5, click the “Save & Add Exception” button to save you from needing to enter exception mode again.

Step 2: Repeat steps 1 through 5 again to remove the second course.

Step 3: The course will now be in the requirement you forced it into with your note displaying underneath the course title.

IMPORTANT NOTE:
If a Select From list remains in the sub-requirement after performing a Force Course exception, you must perform a Remove Course exception for the original selection in the “Select From” list.
In the example above, the advisor would need to perform a Remove Course exception for both BIOL 1020 & 1030, as well as BIOL 1000 & 1010.

Note: Text inserted in the memo field in the previous step will not display on the audit.
Remove Course Exception (RD)

The Remove Course exception can only be used in conjunction with the Force Course exception. This will remove the original course(s) from the “Select From” list so the student cannot choose to take the old course(s) in the list. To perform the Remove Course Exception, enter Exception Mode from the student’s audit. You do not need to use this exception if the Select From list has disappeared.

Example: Advisor replaced PSYC 1200 for required BIOL 1020 & BIOL 1030 set and now needs to remove the old options (i.e., BIOL 1020 & 1030, as well as BIOL 1000 & 1010)

Step 1: In Exception Mode, locate the sub-requirement for which you performed the Force Course exception.

Step 2: Click green \(\Box\) the button next to the Select From list for the sub-requirement.

Step 3: Click the red \(\times\) for the course (or set of courses) that have been substituted.

Step 4: Click the green “Next” button.

Step 5: Ensure “Restrict to this Degree Program” and “Restrict to this Requirement” is checked. Fill in the

Audit Note, Authorized by and Date fields. Click “Save & Run Audit” to see the exception take place.

Step 6: On the new audit, the Select From list will no longer display the old course(s).
Insert Course Exception (RM)
The Insert Course exception will add a course to a “Select From” list to offer a student an additional course to choose among the list. This would mean that a student can choose any course from the list in addition to the course added in via the Insert Course Exception. Advisors and students will find this useful during planning. If this exception is applied at the time of planning, there will be no need to go back in to the audit to add an exception once the course has been completed; it will automatically fulfill the requirement.

Example: Advisor would like to add PHIL 2614 to the list of courses a particular student can select from in the Agribusiness Philosophy courses requirement.

Step 1: In Exception Mode, locate the sub-requirement you would like to add a course to Select From.

Step 2: Click the button next to the Select From list for the sub-requirement.

Step 3: Type the department code and course number, then click the button.

Step 4: Click the green “Next” button.

Step 5: Ensure “Restrict to this Degree Program” and “Restrict to this Requirement” is checked. Fill in the Audit Note, Authorized by and Date fields. Click “Save & Run Audit” to see the exception take place.
Splitting Spanned Course/Requirement Modification Exception (RM)
The Requirement Modification Exception is used when there is a spanned course in an audit that needs to be split.

**IMPORTANT NOTE:**
This exception is only to be used for spanned courses.

**Example:** An Engineering advisor would like 3 credit hours of the complimentary elective 1 course ASIA 1770 to contribute to the complimentary studies elective 2.

Step 1: in Exception Mode, locate the sub-requirement or requirement where there would be a credit hour impact (i.e. the student would require 3 credit hours less). In this case, it would be complimentary elective 2.

Note: the course currently in this sub-req. will be free to flow elsewhere after performing this exception.

Step 2: Click the button next to the corresponding sub-requirement.

Step 3: In the **Required Hours** section, adjust the hours by lessening the amount of credit hours using the button. In this example, click the button three times to adjust for 3 credit hours.

Step 4: Click the green “Next” button.

Step 5: Ensure “Restrict to this Degree Program” and “Restrict to this Requirement” is checked. Fill in the Audit Note, Authorized by and Date fields. Click “Save & Run Audit” to see the exception take place.

Step 6: On the new audit, the student will no longer require 3 credit hours where the second half of the spanned course is applicable. Instead, the audit note will display.

**IMPORTANT NOTE:** This exception is only to be used for spanned courses.
Force Requirement Complete (EE)
The Force Requirement Complete exception will remove an entire requirement from being required any longer from the student.

**IMPORTANT NOTE:**
This type of exception should only be used on requirements that do not require a student to complete any credit hours. If it is used on a requirement that indicates needed credit hours, the student will be lead to believe they are eligible to graduate with less credit hours than is required. This exception will rarely be used.

**Example:** Kinesiology has approved a student’s Standard Aid Certification Exit Requirement and would like to check off the requirement in the audit.

Step 1: In Exception Mode, locate the requirement you would like to force complete and click the black .

Step 2: Ensure “Restrict to this Degree Program” is checked. Fill in the Audit Note, Authorized by and Date fields. Click “Save & Run Audit”.

Step 3: When the new audit is viewed, the whole requirement is now complete and displays a green checkmark next to it. This indicates to the student nothing is required from them for this particular requirement as it is now complete.

**IMPORTANT NOTE:**
Never use the orange version of this button as it will not have the same effect.
Military Residency
This exception is applicable when a student has a lesser residency requirement than other students.

Example: The Bachelor of Kinesiology program requires a student complete 60 credit hours at the University of Manitoba. A military student only requires 12 credit hours.

Step 1: In Exception Mode, locate the residency requirement and click to expand it. Select the orange.

Step 1: Adjust the credit hours needed for the student to complete the residency requirement. In this scenario, the original requirement is 60 credit hours; however, the student only needs 12. (i.e. 60 credit hours -12 credit hours = 48)

This example will need to be adjusted by -48 credit hours (i.e. they need 48 credit hours less than everyone else)

Step 2: Click ‘Next’ and fill out the remaining form with a note of the Military Residency. Then click Save and Run audit. When the new audit is run, the student will only need 12 credit hours in the residency requirement.
Special Scenario

Substituted courses that exceed required hours
This scenario is applicable when a substitution is made that results in the student taking more credit hours than the original curriculum requires.

Example: The curriculum calls for STAT 2220 (3 cr. Hrs.) but the student has received an exception to use STAT 1000 and STAT 2000 (total of 6 cr. Hrs.) in its place. This will result in the student having taken an excess of 3 credit hours.

WARNING
If the Requirement Modification Exception is not performed for this scenario, the additional credit hours from the exception can take the place of another required course. This will result in a student graduating without fulfilling all degree requirements.

Step 1: Perform the exception you need to do your substitute.
This example uses a Force Course exception for STAT 1000 and 2000.

Perform the Force Course exception for both STAT 1000 and 2000
For a refresh on how to perform the Force Course Exception, see page 3

Step 2: Perform a Requirement Modification Exception to add the credit hours still outstanding in the requirement.
Once complete, run a new audit.
In this example, the student still requires 3 credit hours from MATH 2130 in the ‘Degree Core & Major’. Use the required hours section in the Requirement Modification to increase by 3 hours.

Add the outstanding credit hours due to the exception.
For a refresh on how to perform the Requirement Modification Exception, see page 8
Step 3: Perform the **Remove Course Exception** to delete the original course in the select from list.

In this example, delete the original STAT 2220.

When a new audit is run, it will now show the student still requires 3 credit hours in the requirement.
Exceptions Processed in the Registrar’s Office

The following exceptions require form submissions via email to um.achieve@umanitoba.ca. This form can be found at http://intranet.umanitoba.ca/student/records/UM_Achieve.html.

Mutually Exclusive Waiver

This will need to be submitted any time a faculty allows two courses that are mutually exclusive with one another to maintain credit. Once the audit is adjusted, these submissions will be forwarded by the UM Achieve team to the appropriate Records Advisor for correction in Banner.

Example: Student has completed the required BIOL 1020 and 1030 combination in their program but has received special permission to complete the mutually exclusive counterpart BIOL 1000 but still maintain credit for BIOL 1020.

Duplicate Transfer Courses in the Same Term

A submission is needed for a student who has two or more instances of a transfer course in the same term. Normal exceptions will not be able to handle the duplicated course whether the student needs credit from one instance or more than one.

Example: Student has two transfer credits for CHEM 1XXX for Fall 2015 in excess. The advisor would like to use one of them in a requirement.

Waive Credit Hour Exception

This exception will allow a student to graduate with less credit hours than the minimum credit hours required to graduate. This scenario may arise from an equivalency with mismatching credit hours, or an exception that was made on the audit with mismatching credit hours.

Due to system complexities, if an exception has left a student graduating with less credit hours than the minimum credit hours required to graduate, please submit the request to the Registrar’s Office.

Example: Student has taken a 3 credit hour course that is equivalent to the 4 credit hour course required in the original curriculum. This has left the student 1 credit hour short of the minimum required hours to graduate from the program.

Grouped Lists

Grouped lists are courses that students may select from but are categorized into different groups. Grouped Lists can be identified by the following note in the sub-requirement:

Example: A Major in Religion requires a student to complete courses from at least 2 religious traditions.
<table>
<thead>
<tr>
<th>Exception Name</th>
<th>Where to Locate</th>
<th>Audit Symbol</th>
<th>Reason for use</th>
<th>Important Note</th>
<th>Example</th>
<th>User Performing the Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Substitution</td>
<td>“Exceptions” Tab</td>
<td>N/A</td>
<td>Substitute one course for one course.</td>
<td>Legacy courses do not need a term</td>
<td>CIVL 4460 for ANTH 2430</td>
<td>Advisor</td>
</tr>
<tr>
<td>Force Course</td>
<td>Exception Mode</td>
<td>📌</td>
<td>Substitute one course for two, or two courses for one course. +</td>
<td>Use with Remove Course if necessary (see instructions above)</td>
<td>BIOL 1020 and 1030 set to replace BIOE 2590. +</td>
<td>Advisor</td>
</tr>
<tr>
<td>Remove Course</td>
<td>Exception Mode</td>
<td>✖️</td>
<td>Remove Course must always be used for the original course listed. +</td>
<td>Use with Force Course if necessary (see instructions above)</td>
<td>Remove the old BIOE 2590 course.</td>
<td>Advisor</td>
</tr>
<tr>
<td>Insert Course</td>
<td>Exception Mode</td>
<td>+</td>
<td>Add a course to Select From list.</td>
<td>Adding another course option to a list of courses to choose from.</td>
<td></td>
<td>Advisor</td>
</tr>
<tr>
<td>Splitting Spanned Course/Requirement Modification Exception</td>
<td>Exception Mode</td>
<td>📉</td>
<td>Spanned courses that can be split resulting in reduced credit hours in another requirement or sub-requirement.</td>
<td>Only use the required hours section of the exception.</td>
<td>3 credit hours from ASIA 1770 can be applied to another sub-requirement.</td>
<td>Advisor</td>
</tr>
<tr>
<td>Military Residency</td>
<td>Exception Mode</td>
<td>🟢</td>
<td>Lesser amount of credits needed for residency</td>
<td>Subtract amount of credit hours not needed</td>
<td>-48 cr hrs from 60 cr hr residency so only 12 hrs needed</td>
<td>Advisor</td>
</tr>
<tr>
<td>Force Requirement Complete</td>
<td>Exception Mode</td>
<td>🟢 (black)</td>
<td>Force an entire requirement to be complete.</td>
<td>Use only when <strong>no</strong> credit hours are required. Do not use the orange button</td>
<td>Completing an Exit Requirement</td>
<td>Advisor</td>
</tr>
<tr>
<td>Mutually Exclusive Waiver</td>
<td>Submit an Exception Form</td>
<td>N/A</td>
<td>Allowing 2 mutually exclusive courses to maintain credit</td>
<td>Allowing BIOL 1020 and BIOL 1000 (mutually exclusive) to maintain credit.</td>
<td></td>
<td>Registrar’s Office</td>
</tr>
<tr>
<td>Duplicate Transfer Courses in same term</td>
<td>Submit an Exception Form</td>
<td>N/A</td>
<td>An exception is needed for duplicate transfer courses in the same term</td>
<td></td>
<td>F 15 – PSYC 1200  A+</td>
<td>Registrar’s Office</td>
</tr>
<tr>
<td>Waive Credit Hours</td>
<td>Submit an Exception Form</td>
<td>N/A</td>
<td>Allow a student to graduate with less credit hours than the minimum required to graduate.</td>
<td>Please fill out the form and submit to the Registrar’s Office</td>
<td>Student has taken GEOL 1340 (3 Cr. Hrs) instead of GEOL 2250 (4 Cr.Hrs)</td>
<td>Registrar’s Office</td>
</tr>
<tr>
<td>Grouped Lists</td>
<td>Submit an Exception Form</td>
<td>N/A</td>
<td>An exception has been performed on a categorized group of courses</td>
<td>Only applicable when “Advisor note: Grouped List” note exists</td>
<td>Student needs courses from at least 2 religious traditions and an exception has been made to add a course to the select from list</td>
<td>Registrar’s Office</td>
</tr>
</tbody>
</table>