Introduction

Course exceptions will be required in UM Achieve for students that have been given an exception to what appears in the Academic Calendar’s curriculum. There are five different 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:

- Exceptions should not be performed on in progress (IP) courses.
- Exceptions are restricted to a degree program where the exceptions added.

Course Mask

The format template for courses in UM Achieve is called the course mask. It is made up of the subject abbreviation and the course number. The input is case sensitive and may require spaces. 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;

- **Legacy Course Mask:** ###[space]###
  - Example: 052 091

- **Current Course Mask:** AAAA1234, AAA[space]1234, AA[2spaces]1234
  - Example: PSYC1200, SOC 1200, FA 1020

Types of Exceptions

- **Course Substitution (CS)**
  - Substitutes one course for another course from a ‘select from’ list that is required

- **Force Requirement Complete (EE)**
  - Forces a requirement to be complete
  - Closes a check requirement when a course that fulfills it is in Excess Courses
  - Closes the residency requirement for Military students who meet the minimum requirement of 12 credit hours at the University of Manitoba for all faculties except Arts, Science, and Riddell

- **Sub-requirement Modification Exception (RM)**
  - Splits spanned courses to move additional credits into a different sub-requirement
  - Lessens amount of credits needed for residency (Military Residency) for Arts, Science, and Riddell

- **Insert Course (RM)**
  - Adds a course as an additional option to a Select From list of non-required courses

- **Set of exceptions for special circumstances: substituted courses that do not match required credit hours**
  - **Insert Course (RM)**
    - Replaces two courses with one course
    - must be used with the Remove Course exception
  - **Remove Course (RD)**
    - Removes a course as an option in the Select From list
    - may be used with Sub-requirement Modification Exception (RM)
  - **Sub-requirement Modification Exception (RM)**
    - Increases or reduces credits required for a sub-requirement
Submit an Exception Form to Registrar’s Office to perform exceptions in the following situations:

- **Mutually Exclusive Waiver** - Allows two mutually exclusive courses to maintain credit. This will be related to a request for Banner record modification. Be aware that making a change to Banner does NOT change the mutually exclusive rules within UM Achieve. Please submit the exception form when making the request to change Banner to your Records Advisor - cc the UM Achieve email.

- **Duplicate Transfer Course in same term** – Allows a student to have in two of the same courses (UofM spanned course that is split at another institution – i.e., two 3 credit PSYC 1200 courses).

- **Waived Minimum Credit Hour for Graduation** – Allows a student to graduate with less than minimum credit hours required.

- **Grouped List** – Specialized exception used when a sub-requirement contains a grouped list. There is a note within audits notifying advisors of grouped lists. This situation needs an exception submitted to the RO.

- **Force Course** – Very rare situations as most instances will require one of the previous exceptions. These may require minor encoding modifications. Discussion will ensue if an encoding change is possible.
  - Adding a course to a completed sub-requirement
  - Adding a transfer course to a sub-requirement
  - Adding transfer courses that have two (or more) of the same course in the same term (i.e., two 3 credit hour PSYC 1200 courses in the same term)
  - Adding a rejected course to a sub-requirement

Exception mode buttons that are not used by the UofM Advisors – for RO use only

- **Edit Requirement (RM)**
  - We will not use this exception. DO NOT USE

- **Advanced Exceptions**
  - We will not use this exception. DO NOT USE

- **Force Course (C9)**
  - We will not use this exception. DO NOT USE

- **Force Sub-Requirement Complete (EE)**
  - We will not use this exception. DO NOT USE

- **Advanced Exceptions**
  - We will not use this exception. DO NOT USE

- **Add course to Not From**
  - We will not use this exception. DO NOT USE

- **Remove course from Not From**
  - We will not use this exception. DO NOT USE
Within the "Exceptions" Tab: Course Substitution Exception (CS)

This exception is used when a student is allowed to substitute one course for another and their credit hours match. This exception will use a course a student has taken and replace it with a required course identity in all instances where it can be placed in the audit. This is the “>>&MATCHED AS” exception. You may also use this exception for unallocated transfer credits.

This exception is available by clicking on the “Exceptions” tab.

Example Scenario: Advisor needs GEOL 1340 to be recognized as GEOL 2250 in the audit.

**Step 1:** From the audit, copy the Program code on the top of the page.

**Step 2:** Find the course in the audit that you want to use as the substitute and make note of the term in which it was taken.

**Step 3:** In the “Exceptions” tab, click on the “Add Exception” button.

**Step 4:** Click on the “Course Substitution” exception description.

If the course exceeds the original credit hours needed, please see the Requirement Modification for splitting spanned course credits.
**Step 4:** Using the specific course masks, insert the following information and click the **Save** button.

**1. UM Achieve Program Code**
Paste the program code from the audit in to this field. This will restrict the exception for this student to this specific program.

**2. Course Taken by Student**
Enter the course in the student’s history.

**3. Year/Term**
You must enter the term for the course that is in the student’s history unless it is a legacy course.

**4. Substituted Course**
Enter the course for which the one above will replace. You may even use generic subject areas such as MATH**** if necessary.

**5. Message Displayed on audit**
This is a 23-character message to display next to the course.

**6. Memo**
This memo is required and will display in the “Applied Exceptions” tab, not on the audit.

**7. Authorized By** (this field will populate itself)
The name of the authorizer

**8. Date** (this field will populate itself)
The date for which the exception was authorized

Course substitution exception completed

<table>
<thead>
<tr>
<th>#</th>
<th>Code</th>
<th>Audit Note</th>
<th>Pseudo Name</th>
<th>Course</th>
<th>Recourse</th>
<th>Auth Code</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CR</td>
<td>GEOL.1340 subs GEOL2250</td>
<td></td>
<td>GEOL1340</td>
<td>GEOL2250</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Step 5:** You must run the same 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 declared program).

**Step 6:** The audit will now place the new course, anywhere the substituted course can be applied.

**NEEDS:** 49.0 HOURS 12 COURSES

**SELECT FROM:**
CIVL 3690  CIVL 3700  CIVL 3730  CIVL 3760  CIVL 3770  CIVL 3790  CIVL 4220
CIVL 4380  CIVL 4390  CIVL 4400  CIVL 4460  CIVL 4590

5 and 6 have a specific wording policy that needs to be followed. Please refer to the chart at the end of this document.
**Force Requirement Complete (EE)**

The Force Requirement Complete exception will close a requirement that has been completed but has courses in excess or that is a non-academic requirements.

***** IMPORTANT NOTE: This type of exception should only be used on requirements that are non-credit or Check Requirements. Check Requirements are denoted with an italicized title. If this exception is used on a requirement that needs credit hours, the student will be lead to believe they are eligible to graduate with less credit hours than is required.

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

Example: Check Requirement (denoted with an italicized title) - Faculty of Arts student has completed the Major, Minor and Options courses. The student has completed the Science Requirement, but 3 credits for Science are in Excess Courses.

Example: A Military student does not meet the normal University of Manitoba residency requirement but meets the minimum residency requirement for Military students. FOR ALL FACULTIES (EXCEPT ARTS, SCIENCE, RIDDELL – for these see Edit Sub-requirement Example B on page 7).

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

***** IMPORTANT NOTE: Never use the orange version of this button as it will not have the same effect.

**Step 2:** Fill in the Audit Note, Memo, 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 that nothing further is required from them for this particular requirement.
Example A: Splitting a Spanned Course - The Requirement Modification Exception is used when there is a spanned course in an audit that needs to be split between two requirements.

An Engineering advisor would like 3 credit hours of the Complimentary Elective 1 course ENGL 1200 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 (not where the course populated). In this case you would locate the Complimentary Studies Elective 2 sub-requirement.

The student would require 3 credits less in this sub-requirement.

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

►Step 3: In the Required Hours section, lessen the amount of credit hours by using the button.

***** IMPORTANT NOTE: Never use the Required Course Count or Required GPA areas.

►Step 4: Click the green “Next” button.

►Step 5: Fill in the Audit Note, Memo, 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.
Example B: Military Residency – FOR FACULTIES OF ARTS, SCIENCE, AND RIDDELL (all others use Force Requirement Complete outlined on page 5).
The Bachelor of Arts program requires students to complete 48 credit hours at the University of Manitoba. A military student only requires 12 credit hours.

Note: If orange buttons could not be located, please complete this exception by using Force Requirement Complete □

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

►Step 2: Adjust the credit hours needed for the student to complete the residency requirement. In this scenario, the original requirement is 48 credit hours; however, the student only needs 12. (i.e., 48 credits - 12 credits = 36) This example will need to be adjusted by -36 credits (i.e., they need 36 credit hours less than everyone else).

***** IMPORTANT NOTE: Never use the Required Course Count or Required GPA areas.

►Step 3: Click ‘Next’ and fill out the remaining form with an audit note and memo. Then click Save and Run audit. When the new audit is run, the student will only need 12 credit hours in the residency requirement.
Insert Course Exception (RM)

The Insert Course exception will allow an advisor to add a course to a “Select From” list. This exception would be used if an advisor wanted to offer a student an additional course choice. This would mean that a student can choose any course from the list in addition to the course added via the Insert Course Exception. This exception is helpful for student planning. If a student knows in advance that they plan to take a particular course, for example an upcoming topic, to satisfy a requirement, then the course can be added to the list and will automatically be used when the student registers.

The Insert Course exception is available by clicking on “Enter Exception Mode” on the top right of an audit.

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

**Step 2**: Click on the button beside Select From under the desired sub-requirement. In this case, it’s Complementary Studies Elective 2 and 3.

**Step 3**: In the “Add Course” tab, scroll down and look for the desired completed course (B) or type the subject code and course number (A) then click the button if this is a course the student has not yet taken. The courses selected will appear on the right side. If you insert the wrong course, click on the button to remove the selected course.

**Step 4**: Click on the button to continue to the next tab “2. Verify & Save”.

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Revised on November 02, 2018
**Step 5:** Fill in Audit Note (27 characters max.), i.e. **Add ENVR1000. Please do not use “&” in this field.**

Please add a reason in the Memo field following the recommended text. Authorized By and Date fields are filled automatically.

**Step 6:**

→ Click on the **Save & Add Exception** button to proceed to the next step.

Or

→ Click on the **Save & Run Audit** button to save and view the audit.

Additional Note:

A. When inserting a course that student already registered for and it’s listed in Excess, the course will automatically populate when the next audit is run.

B. When inserting a course that student will register it in the future, the new course number will listed in “Select From” list.
Set of exceptions for special circumstances: substituted courses that do not match required 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.

Student needs two courses STAT 1000(3) & 2000(3) to replace a required STAT 2220(3) course.

**Insert Course Exception (RM)**

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

▶ **Step 2:** Click on the + button beside *Select From* under the desired sub-requirement.

▶ **Step 3:** In “Add Course” tab, Scroll down and look for the desired completed course (B) or type the subject code and course number (A) then click the + button if this is a course the student has not yet taken. The courses selected will be added on the right side. If you insert the wrong course, click on the - button to remove selected course.

▶ **Step 4:** Click on the Next button to continue to next tab “2. Verify & Save”.

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Revised on November 02, 2018
Step 5: Fill in Audit Note (27 characters max.), i.e. Add STAT1000+2000. Please do not use “&” in this field.

Please add a reason in the Memo field following the recommended text. Authorized By and Date fields are filled automatically.

Step 6:
→ Click on the Save & Add Exception button to proceed next step.

Or

→ Click on the Save & Run Audit button save and view the audit.

Remove Course Exception (RD)

The Remove Course exception can only be used in conjunction with the Course Insert Exception where there’s a two to one course or one to two courses relation, and the Requirement Modification 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.

WARNING: Please do not use this exception for course substitution exceptions.

Step 7: Click on the beside Select From under the desired sub-requirement (this must be the same sub-requirement from previous exception, in this scenario it’s Degree Core & Major: Biosystems Engineering).

Click on the beside the course (or set of courses) that have been substituted.
Step 8: Click on the Next button to continue to next tab “2. Verify & Save”.

Step 9: Fill in Audit Note Field (27 characters max.), i.e. Del STAT 2220. Please do not use “&” in this field.

Please add a reason in the Memo following recommended text. Authorized By and Date fields are filled automatically.

Step 10:
→ Click on the Save & Add Exception button to proceed next step.
Or
→ Click on the Save & Run Audit button save and view the audit.

Edit Subrequirement (RM)

Step 11: In Exception Mode, locate the subrequirement or requirement where there would be a credit hour impact (not where the course populated)

Step 12: Click the button next to the corresponding subrequirement.

Step 13: In the Required Hours section, adjust the hours by clicking or button.

Step 14: Click the green “Next” button.
**Step 15**: Fill in the Audit Note, Memo, Authorized by and Date fields. Click “Save & Run Audit” to see the exception take place.

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### Subrequirement Modification Exception

**Subrequirement**

Biosystems Engineering Degree Core

<table>
<thead>
<tr>
<th>Required Course Count</th>
<th>Required Credit Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original Value: 0</td>
<td>Original Value: 81</td>
</tr>
<tr>
<td>Adjust by: 0</td>
<td>Adjust by: 3</td>
</tr>
</tbody>
</table>

**Required GPA**

| Original Value: 0 | Adjust by: 0.00 |

☑ Restrict to this Degree Program. ☑ Restrict to this Requirement.

**Audit Note**

`STAT1000+2000~STAT2220`

(Maximum characters: 27)

**Memo**

Student completed 6 cr where 3 cr is required in the sub-req. Add 3 cr to the sub-req

(Maximum characters: 255)

**Authorized by**

heck

(Maximum characters: 30)

**Date**

10/04/2018

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**Example B**: After adding the STAT 1000 & 2000, the audit states that the student needs to take 34 credits. The actual amount of credits needed based on the courses required is 37 credits.

By performing **Requirement Modification**, it will adjust the “NEEDS” to 37 credits.
Exceptions Processed in the Registrar’s Office

The following exceptions require form submission 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. These submissions can either go to the Records Advisor who then forwards them to the UM Achieve team or they can be submitted to the UM Achieve team who will forward them 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 PSYC 1200(3) 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 two optional courses with mismatching credit hours or an exception that was made with less credit hours than required. 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 course that is equivalent to the 4 credit hour course required in the original curriculum. This has left the student 1 credit 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 two religious traditions.

Force Course

1. Adding a course to a completed sub-requirement
2. Adding a transfer course to a completed sub-requirement
3. Adding transfer courses that have two (or more) of the same course in the same term (i.e., two 3 credit hour PSYC 1200 courses in the same term)
4. Adding a rejected course to a sub-requirement
## Exception Chart

<table>
<thead>
<tr>
<th>Exception Name</th>
<th>Location</th>
<th>Audit Symbol</th>
<th>Important Note</th>
<th>Description</th>
<th>Examples</th>
<th>Audit Note</th>
<th>Memo Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Substitution (CS)</td>
<td>Exception Tab</td>
<td>N/A</td>
<td>Only subs a required course listed in Select From list. Please record Program Code, Original Course, New course number and term student completed Legacy courses do not need input a term</td>
<td>Substitute a required course with a different course</td>
<td>MATH 1240 replaced with COMP 2130</td>
<td>BBBB9999 subs AAAA9999</td>
<td>Substitution approved by ________</td>
</tr>
<tr>
<td>Requirement Modification (RM)</td>
<td>Exception Mode</td>
<td>( )</td>
<td>Apply this exception only in the requirement affected, not where the course is populated</td>
<td>Modified required cr in a sub-requirement</td>
<td>FAAH 1030 replaced with 054 103</td>
<td>999 999 subs AAAA9999</td>
<td>Legacy Course</td>
</tr>
<tr>
<td>Insert Course (RM)</td>
<td>Exception Mode</td>
<td>+</td>
<td>Use only when Select From list is visible. If not, please contact RO for assistant</td>
<td>Provide an additional course selection in Select From list</td>
<td>Add AAAA9999</td>
<td>Additional course added, approved by ________</td>
<td></td>
</tr>
<tr>
<td>Force Requirement Complete (EE)</td>
<td>Exception Mode</td>
<td>✅</td>
<td>Use only when NO cr. Hrs. are required</td>
<td>Force an entire requirement to be complete</td>
<td>Completing an Exit Requirement</td>
<td>AAAA9999</td>
<td>AAAA9999 used to fulfill _______ CK req</td>
</tr>
<tr>
<td>Two to one course exception Scenario</td>
<td>Insert Course (RM)</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remove Course (RD)</td>
<td>Exception Mode</td>
<td>−</td>
<td>Use only when original course is still listed in Select From</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requirement Modification (RM)</td>
<td>Exception Mode</td>
<td>( )</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One to two courses exceptions scenario</td>
<td>Insert Course (RM)</td>
<td>+</td>
<td>used when one 6 cr. course is replaced by two 3 cr. courses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remove Course (RD)</td>
<td>Exception Mode</td>
<td>−</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Insert Course (RM)
- **Use only when** Select From list is visible. If not, please contact RO for assistant
- **Provide an additional course selection in** Select From list
- **Add AAAA9999**
- **Additional course added, approved by ________**

### Force Requirement Complete (EE)
- **Use only when NO cr. Hrs. are required**
- **Force an entire requirement to be complete**
- **Completing an Exit Requirement**
- **Degree requirements are complete but CHECK requirement is not and, in this instance would use courses from Excess**
- **Military Residency** (NOT for ARTS, SCIENCE, RIDDLELL)
- **Military Residency 12cr req**
- **Military Student only required 12 cr to fulfill residency requirement**

### Two to one course exception Scenario
- **STAT2220(3) is required, but student completed STAT1000(3) and STAT2000(3)**
- **BBBB9999+CCCC9999=AAAA9999**
- **BBBB9999+CCCC9999=AAAA9999**

### Remove Course (RD)
- **Use only when original course is still listed in Select From**
- **Used when two courses replace one course**
- **BBBB9999+CCCC9999=AAAA9999**
- **BBBB9999+CCCC9999=AAAA9999**
- **AAA9999 has been replaced with BBBB9999 and CCCC9999**

### Requirement Modification (RM)
- **Apply this exception only in the requirement affected, not where the course is populated**
- **Modified required cr in a sub-requirement**
- **Splitting Spanned (6 cr) course to fulfill two requirements**
- **3 cr AAAA9999 applied**
- **__ cr from AAAA9999 used in this requirement**
- **Military Residency** (only for ARTS, SCIENCE, RIDDLELL)
- **Military Residency 12cr req**
- **Military Student only required 12 cr to fulfill residency requirement**

### One to two courses exceptions scenario
- **ECON1010(3) and ECON1020(3) replaced by ECON1200(6)**
- **CCCC9999=AAAA9999+BBBB9999**
- **AAA9999 and BBBB9999 has been replaced with CCCC9999**
- **AAA9999 and BBBB9999 has been replaced with CCCC9999**
- **AAA9999 and BBBB9999 has been replaced with CCCC9999**