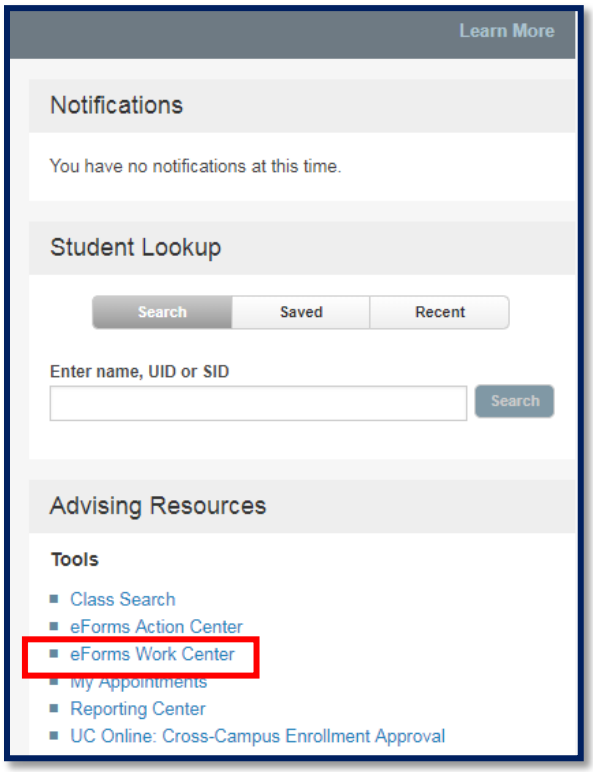
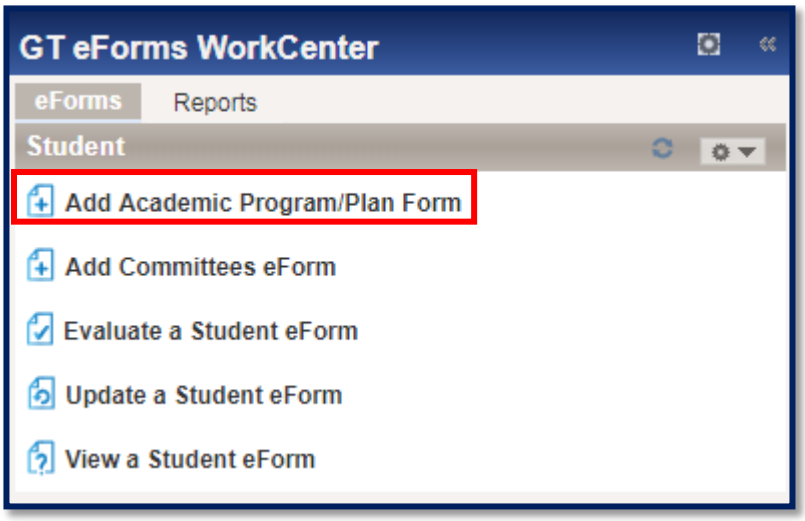
# Academic Change of Program/Plan eForm and Routing

This job aid describes the eForm process to add, drop or change an Academic Program, Plan, Designated emphasis or Subplan and the routing of the eForm once submitted.

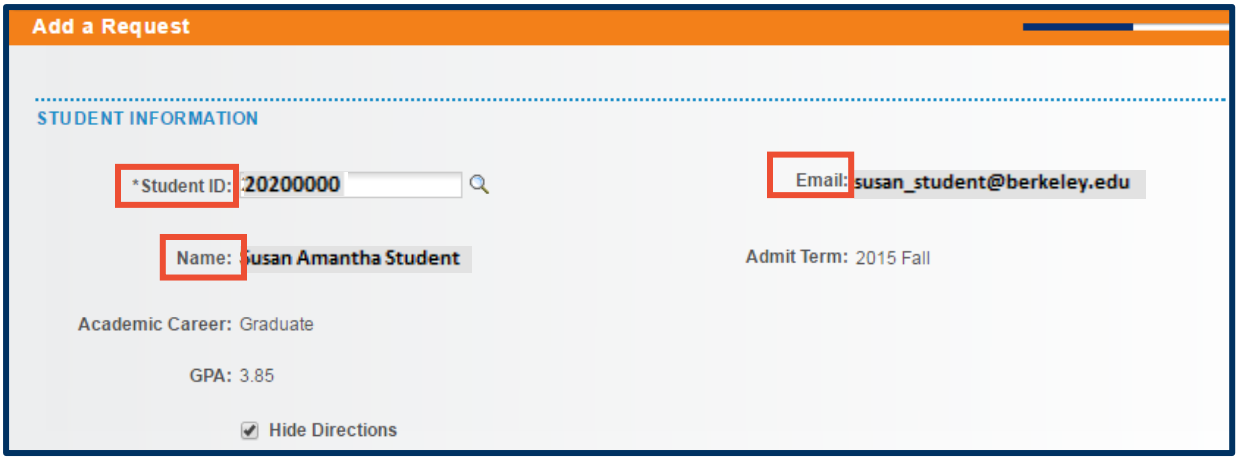
1. Log in to CalCentral using your CalNet ID and passphrase.
   Select **eForms WorkCenter** from the list of **Advising Resources.**




2. Under the **Student** heading, click on **Add Academic Program/Plan eForm**.

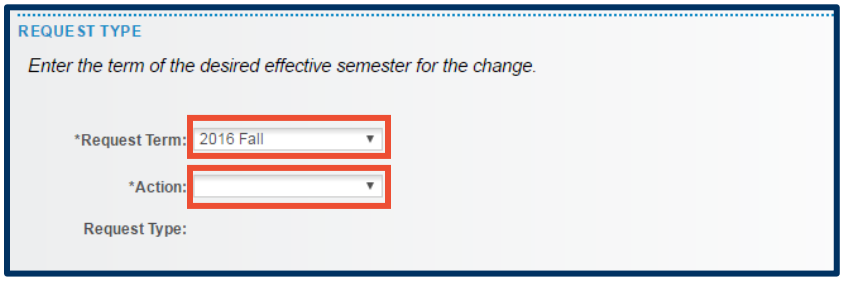


3. You arrive at the **Add a Request** window.

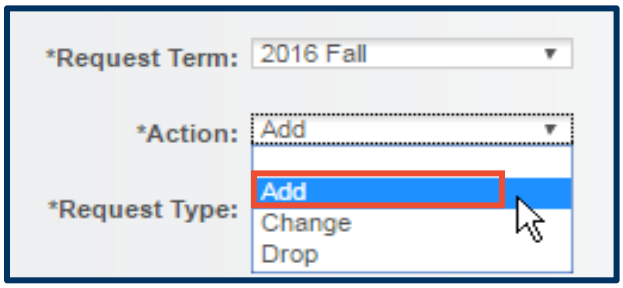



Note: The student ID is input manually or through the **Look Up** magnifying glass. Press the tab key, once you have entered the student's ID, to change from your UID to the student's ID. The student's Name and Email will then auto-populate.

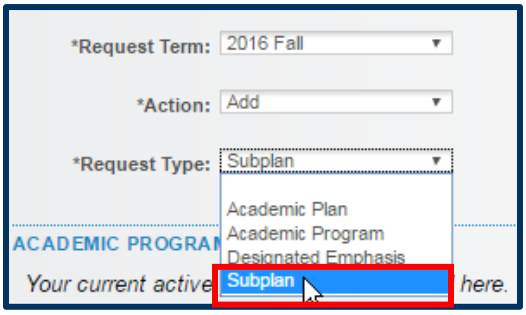
4. Select a **Term** from the **Request Term** drop-list. Once **Term** is selected, **Action** becomes available.



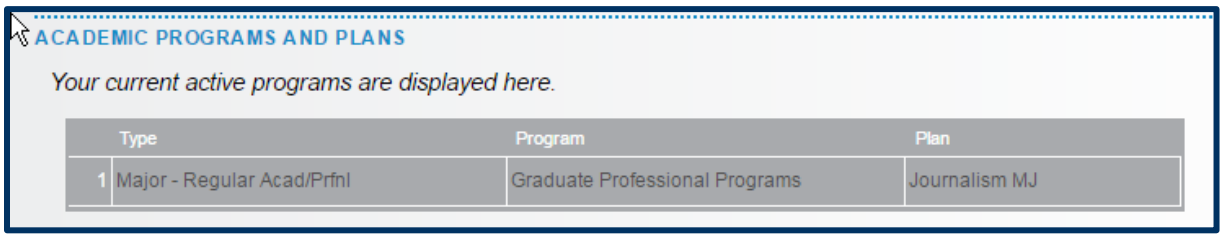

5. Select an **Action** (**Add**, **Change**, or **Drop**). In this instance, we are choosing "**Add**".



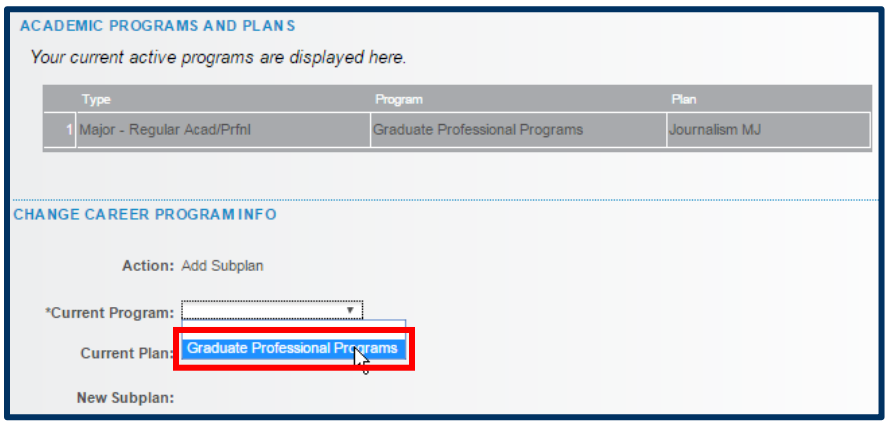
6. Select from the **Request Type** drop list. (Here, our student wants to add a **Subplan**.)



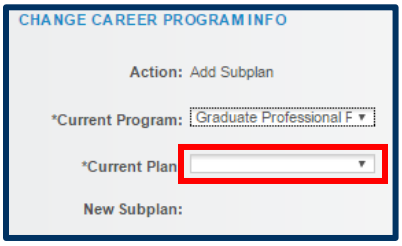

You will see the student's current **Academic Programs and Plans**.



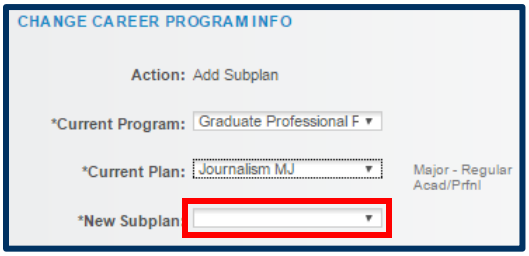

7. Under **CHANGE CAREER PROGRAM INFO**, select the current program from the Current Program drop list. Then **Current Plan** and **New Subplan** can be configured.

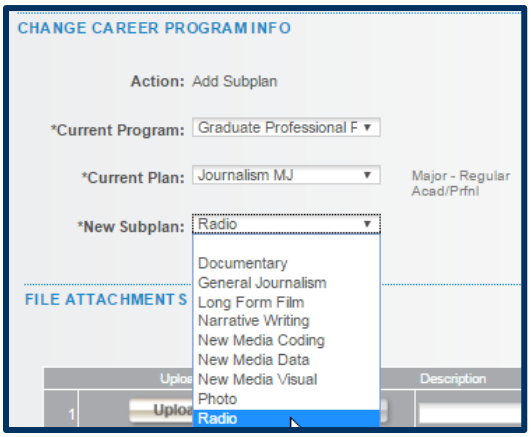



8. Select **Current Plan**.



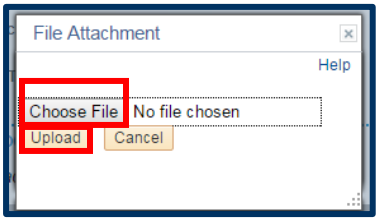
**9.** Then select **New Subplan**.



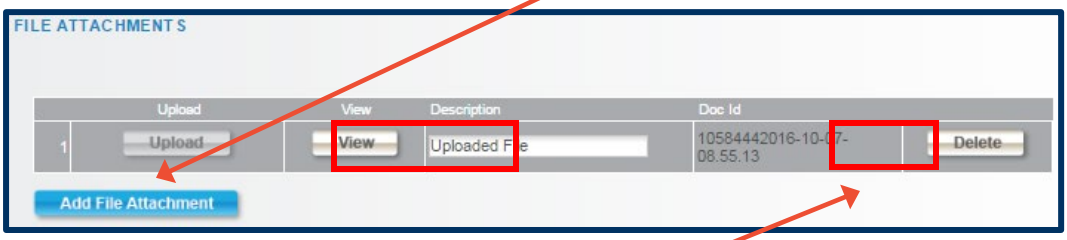

Following that, there is a section within which you can attach a file. To do so, click the **Upload** button. (Examples of documents you might upload are letters in support of the action.)

**10.** Next, click the **Choose File** button, and select a file from a local or network drive.



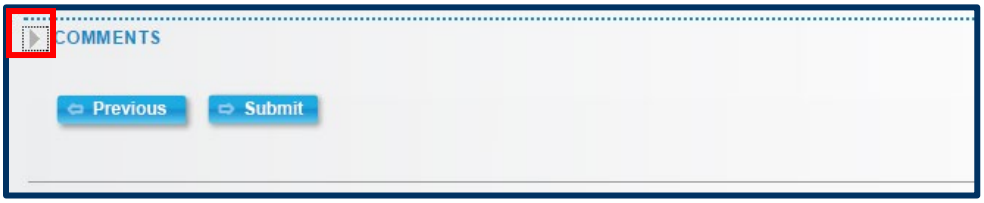

**11.** Click the second **Upload** button.

**12.** Finally, type a **Description** for the file. Descriptions are mandatory. (Click the **Add File Attachment** button to upload more files.)



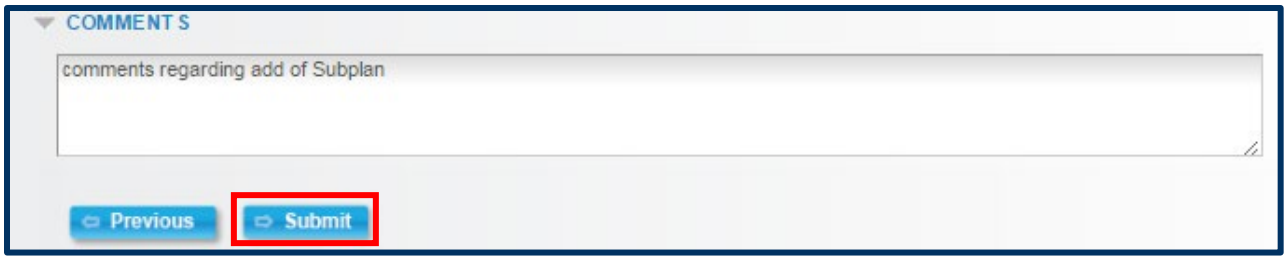

(Note that the attachment can be deleted.)

**13.** The **COMMENTS** section appears below attachments. To add a comment, click the **right-pointing triangle** next to the word, **COMMENTS.**

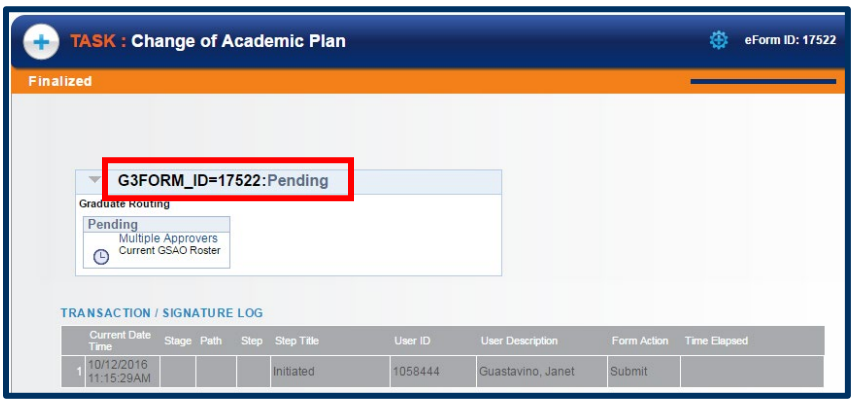



This opens a text box into which you may type comments,
examples of which might relate to exceptions and additional background.

**14.** To save the **Academic Plan Add**, click the **Submit** button below the **Comments** box.



**15.** The second-to-last step in the process is routing the submitted request. Different requests pass through different routes, but in this case, routing led to the Subplan change being **Pending** (with an eForm ID number of **17522**).




Finally, click the **Close** button in the lower-right corner of the screen ( Close ).

### Approval of an eForm

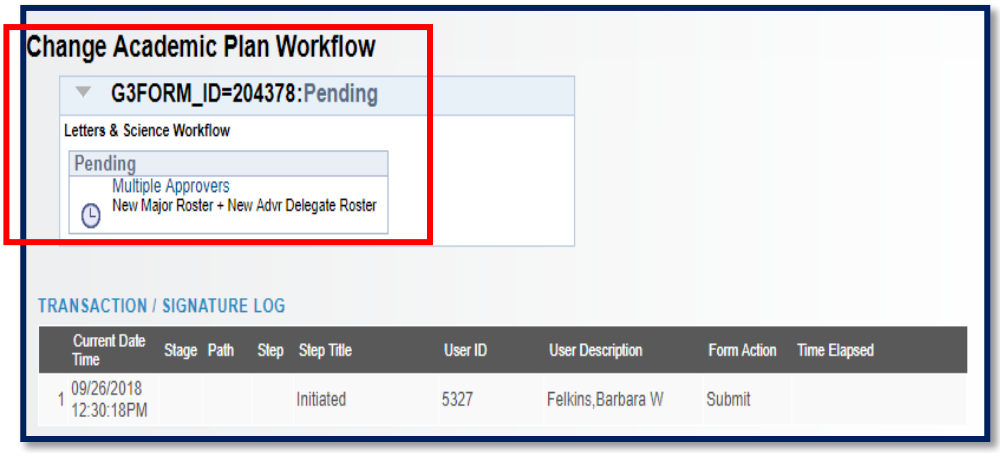
Upon the Academic Program/Plan being submitted for approval the following can occur:

## One Step Approval

### IF Initiator is NOT same as Approver . . .

In this example Barbara Felkins (who is not a Letters & Science advisor) submitted the eForm.

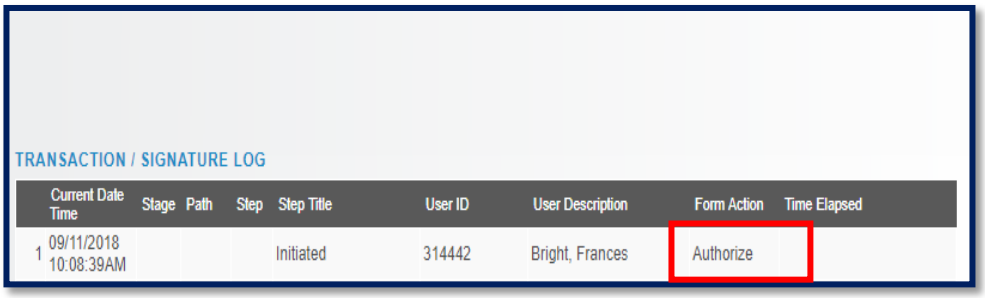
Form routes to the advisor of the other college where the status is now pending.




### IF Initiator is same as Approver . . .

In this example Frances Bright who is a Letters & Science advisor submitted the form.

Note: the Form Action is "**Authorize**" which means the request has been approved.

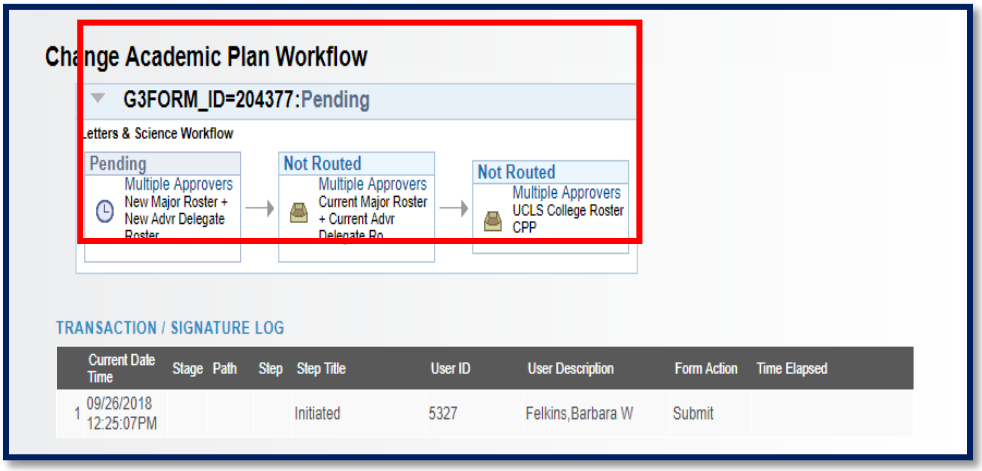


## Sequential Routing

### IF Initiator is NOT same as Approver . . .

In this example Barbara Felkins who is not a Letters & Science advisor submitted the form.

The form is routed to the additional college for approval.



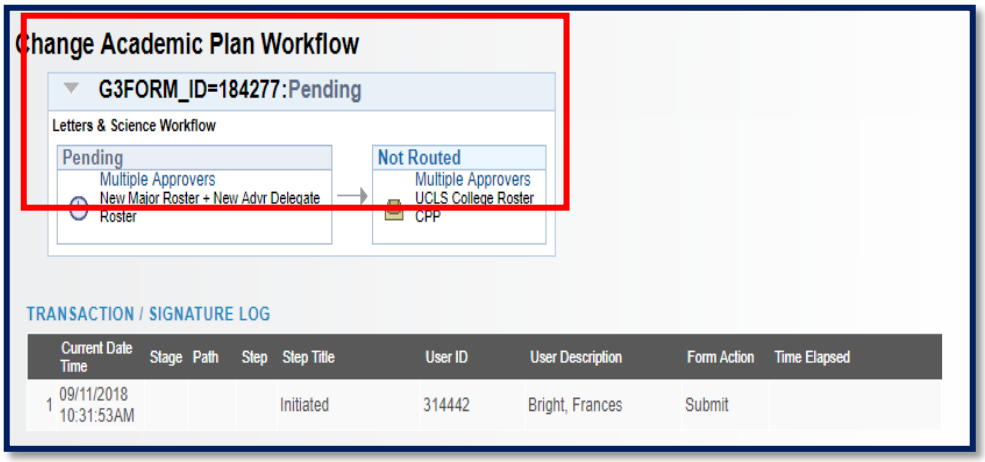

### IF Initiator is same as Approver . . .

In this example Frances Bright, a Current Major Advisor for the student Letters & Science, advisor submitted the form.

Because she is the Current Major Advisor**, it skipped the approval step for 'Current Major Roster**'

Email Notifications: After the form is submitted an email notification is sent to the first step approvers (in this case New Major Advisor) and after they approve on the first step, an email will be sent to the third step approvers (in this case Letters & Science College Advisors) requesting for approval.

**Note**: In this case both the approval step (Current Major Advisor) is skipped and the email notification (Current Major Advisor) isn't sent.



# SIM Degree EGT Change Request

For SIM degree EGT change requests, the advisor of the home college is no longer required to add the advisor of the second college using the ad hoc routing functionality. The form automatically routes to both colleges sequentially for approval.

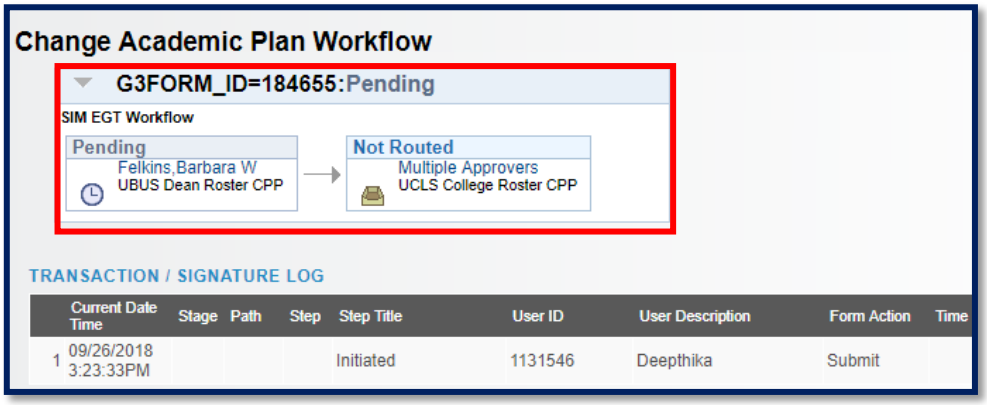
**Order of colleges**

1. Business
2. Chemistry
3. Engineering
4. Environmental Design
5. Letters and Science
6. Natural Resources

## 1. Standard Routing

### Routes to both colleges, if Initiator is NOT same as Approver

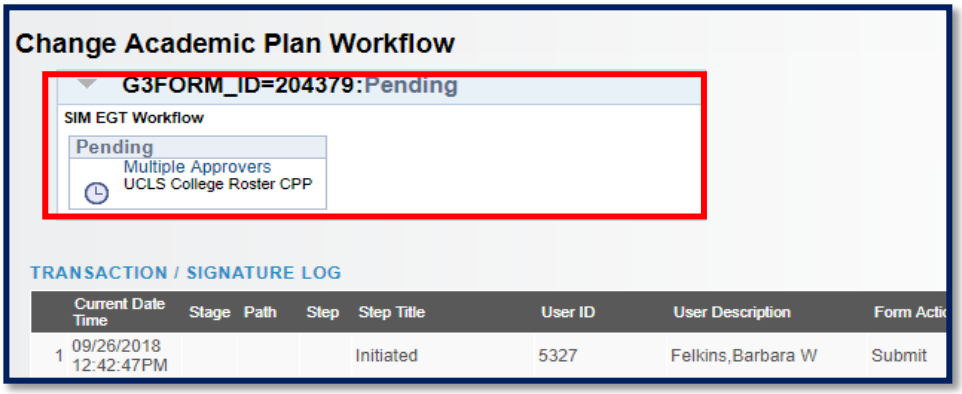
In this example a student has a SIM degree in Letters & Science and Business. An advisor who is neither Letters & Science nor Business submitted the form, hence it requires approval from both colleges.




## 2. Skip Approval Routing

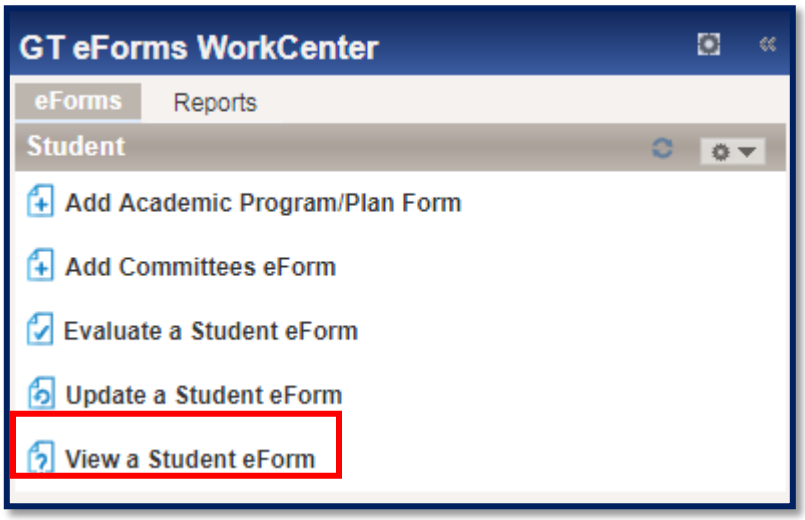
### Skip approvals happen if the Initiator is same as Approver

In this example the student has a SIM degree in Letters & Science and Business. Barbara Felkins who is a Business Dean submitted the form hence it skipped the approval from Business and only routed to Letters & Science.



## Reviewing Prior eForms

The advisor can review submitted eforms from the link **'View a Student eForm'**




### Support:

For questions or assistance, please contact SIS Production Support:

- Email: sishelp@berkeley.edu
- Call 510-664-9000 (press option 6)

For additional SIS resources, please visit:

- http://sis.berkeley.edu/training