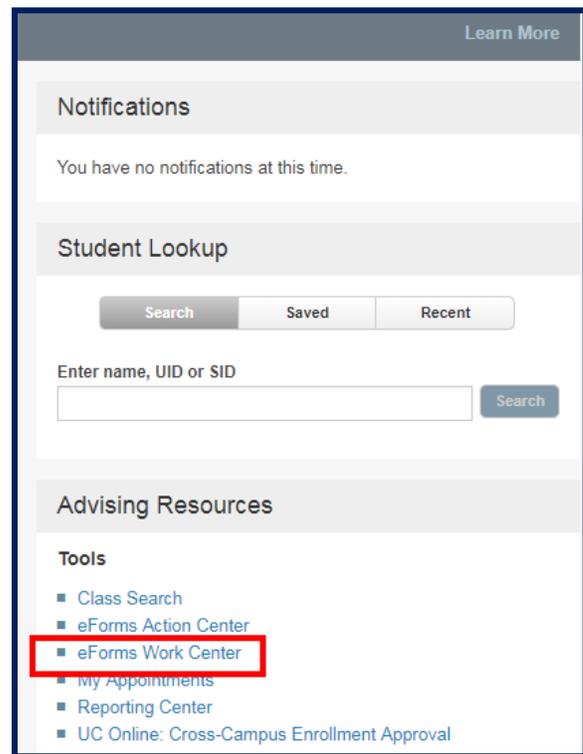


## Academic Change of Program/Plan eForm and Routing

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.

The screenshot shows the 'Add a Request' window with the following details:

- STUDENT INFORMATION**
- \*Student ID: 20200000 (with a magnifying glass icon)
- Email: susan\_student@berkeley.edu
- Name: susan Amantha Student
- Admit Term: 2015 Fall
- Academic Career: Graduate
- GPA: 3.85
- Hide Directions

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.

The screenshot shows the 'REQUEST TYPE' section with the following details:

- Enter the term of the desired effective semester for the change.
- \*Request Term: 2016 Fall
- \*Action: (empty dropdown)
- Request Type: (empty text field)

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

The screenshot shows the 'Action' dropdown menu with the following details:

- \*Request Term: 2016 Fall
- \*Action: Add (selected)
- \*Request Type: (empty text field)
- Request Type options: Add, Change, Drop

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**.

Type	Program	Plan
1 Major - Regular Acad/Prfnl	Graduate Professional Programs	Journalism MJ

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**.

CHANGE CAREER PROGRAM INFO

Action: Add Subplan

\*Current Program: Graduate Professional F

\*Current Plan: Journalism MJ Major - Regular Acad/Prfnl

\*New Subplan: [Red Box]

CHANGE CAREER PROGRAM INFO

Action: Add Subplan

\*Current Program: Graduate Professional F

\*Current Plan: Journalism MJ Major - Regular Acad/Prfnl

\*New Subplan: Radio

Documentary

General Journalism

Long Form Film

Narrative Writing

New Media Coding

New Media Data

New Media Visual

Photo

Radio

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.)

FILE ATTACHMENTS

	Upload	View	Description	Doc. Id
1	Upload	View		

Add File Attachment

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

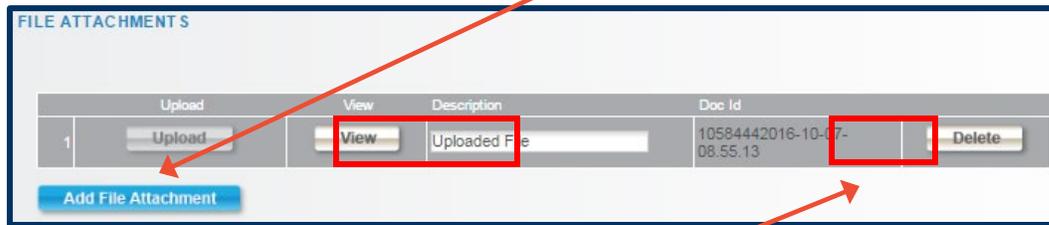
File Attachment

Choose File No file chosen

Upload Cancel

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.)

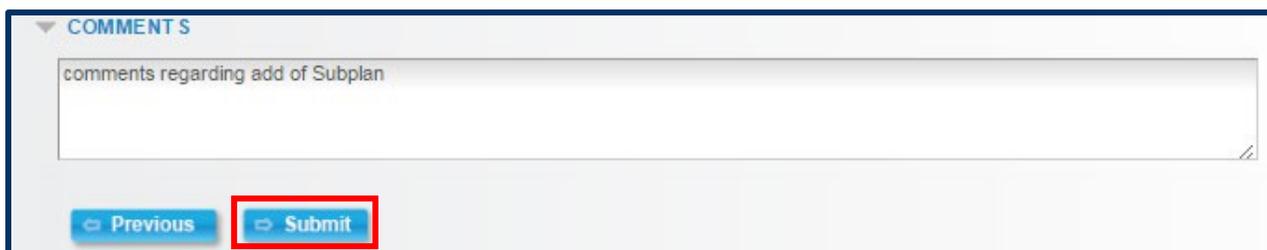
13. The **COMMENTS** section appears below attachments. To add a comment, click the **right-pointing triangle** next to the word, **COMMENTS**.



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**).

TRANSACTION / SIGNATURE LOG									
	Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
1	10/12/2016 11:15:29AM				Initiated	1058444	Guastavino, Janet	Submit	

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

### 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.

The screenshot shows a workflow interface titled "Change Academic Plan Workflow". A red box highlights the top section, which includes a dropdown menu showing "G3FORM\_ID=204378: Pending". Below this, it indicates "Letters & Science Workflow" and "Pending" status. A sub-section titled "Multiple Approvers" lists "New Major Roster + New Advr Delegate Roster". Below the workflow information is a "TRANSACTION / SIGNATURE LOG" table.

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
09/26/2018 12:30:18PM				Initiated	5327	Felkins, Barbara W	Submit	

#### 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.

The screenshot shows a "TRANSACTION / SIGNATURE LOG" table with the following data:

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
09/11/2018 10:08:39AM				Initiated	314442	Bright, Frances	Authorize	

## 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.

**Change Academic Plan Workflow**

G3FORM\_ID=204377:Pending

Letters & Science Workflow

```

    graph LR
      A[Pending: Multiple Approvers  
New Major Roster +  
New Advr Delegate  
Roster] --> B[Not Routed: Multiple Approvers  
Current Major Roster  
+ Current Advr  
Delegate Roster]
      B --> C[Not Routed: Multiple Approvers  
UCLS College Roster  
CPP]
    
```

TRANSACTION / SIGNATURE LOG

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
1 09/26/2018 12:25:07PM				Initiated	5327	Felkins, Barbara W	Submit	

### 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.

**Change Academic Plan Workflow**

G3FORM\_ID=184277:Pending

Letters & Science Workflow

```

    graph LR
      A[Pending: Multiple Approvers  
New Major Roster + New Advr Delegate  
Roster] --> B[Not Routed: Multiple Approvers  
UCLS College Roster  
CPP]
    
```

TRANSACTION / SIGNATURE LOG

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
1 09/11/2018 10:31:53AM				Initiated	314442	Bright, Frances	Submit	

## 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.

TRANSACTION / SIGNATURE LOG									
Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time	
1 09/26/2018 3:23:33PM				Initiated	1131546	Deepthika	Submit		

### 2. Skip Approval Routing

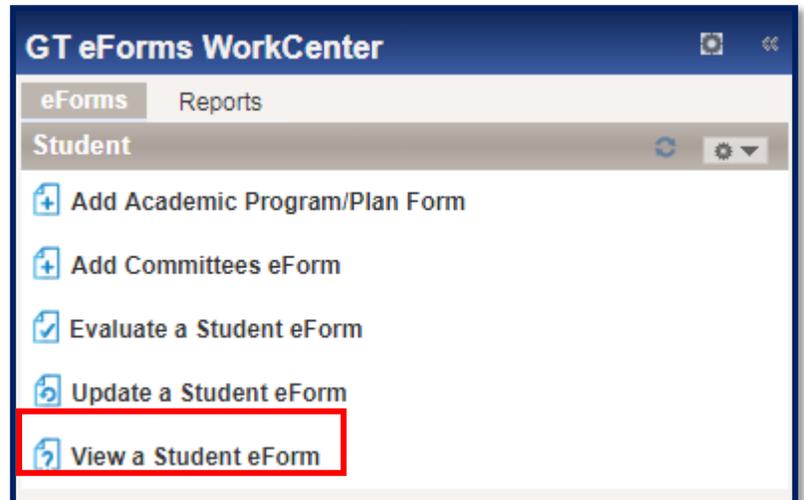
Skip approvals happen if the Initiator is same as Approver

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.

TRANSACTION / SIGNATURE LOG									
Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time	
1 09/26/2018 12:42:47PM				Initiated	5327	Felkins, Barbara W	Submit		

## Reviewing Prior eForms

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



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### Support:

For questions or assistance, please contact SIS Production Support:

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

For additional SIS resources, please visit:

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