

9.2 Define Enrollment Action Reasons

Purpose: Use this document as a reference to define enrollment action reasons in PeopleSoft.

Audience: Student Records staff.

! You must have at least one of these local college managed security roles:

- ZD SACR Student Rec Config
- ZZ SACR Student Rec Config

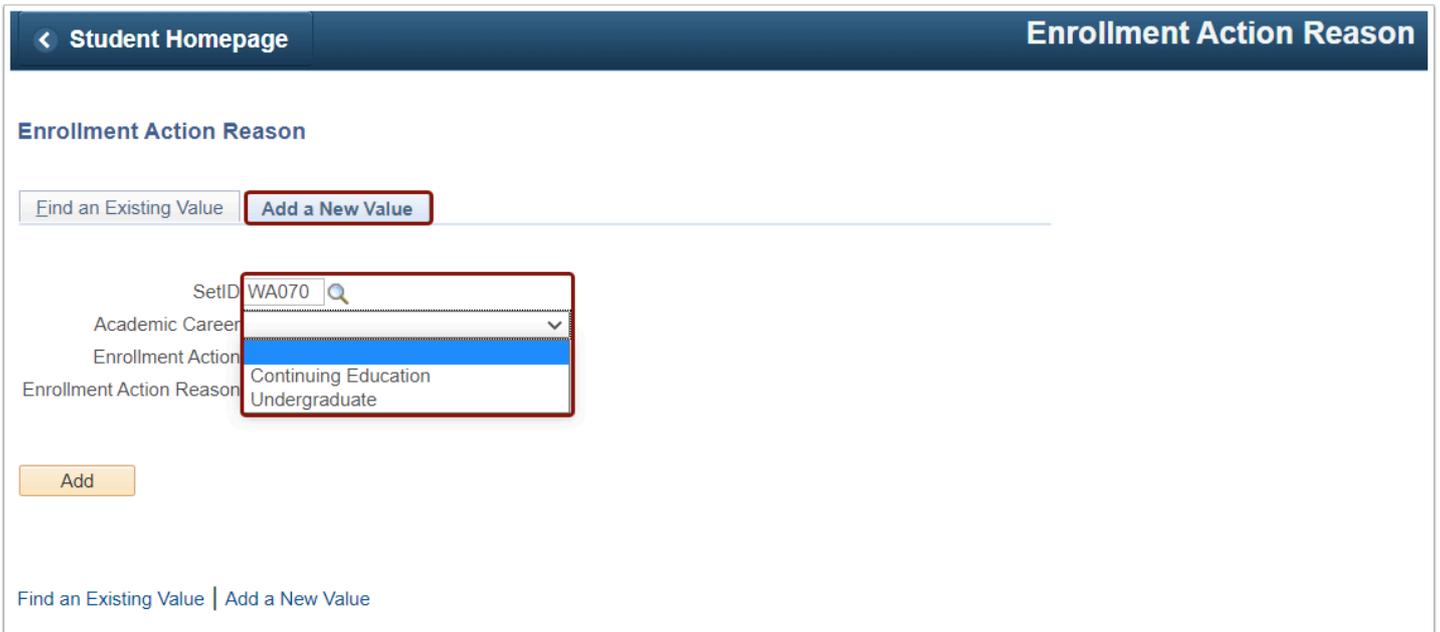
If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Define Enrollment Action Reasons

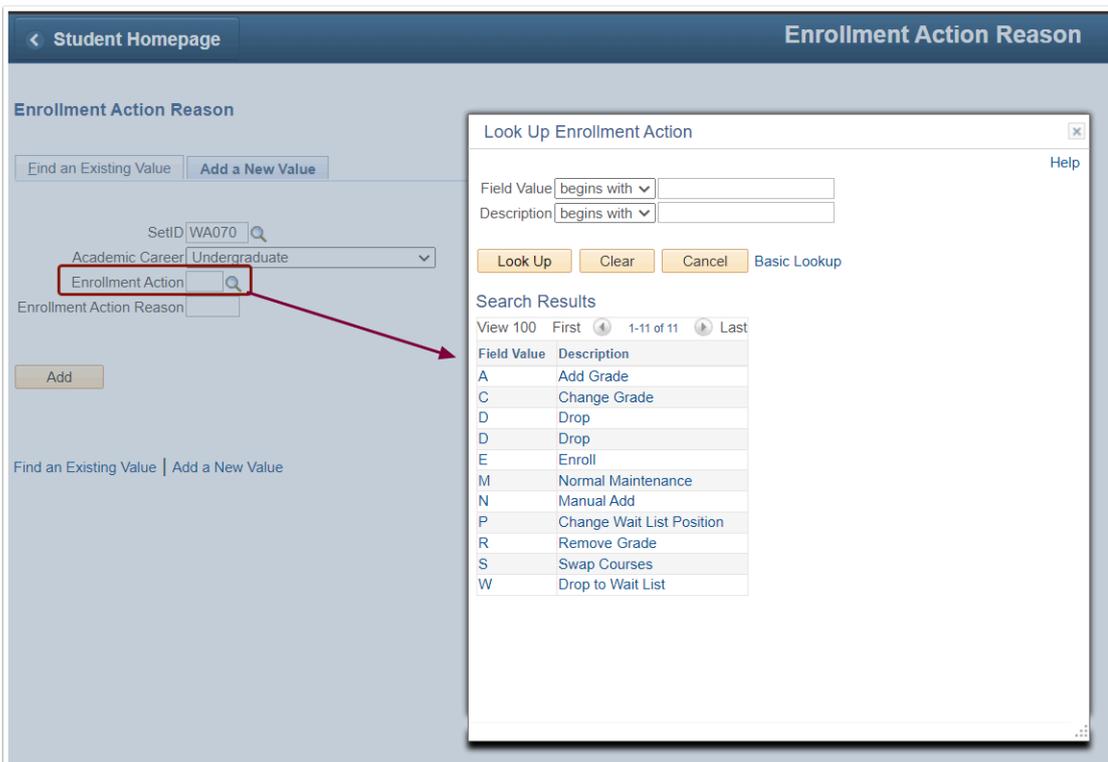
Navigation: NavBar > Navigator > Set Up SACR > Product Related > Student Records > Enrollment > Enrollment Action Reason

i **Enrollment Action Reasons** describe the reasons for enrolling, dropping, or withdrawing a student from a class. Suppose a student enrolled after class started; you can provide an explanation using an Action Reason. Action Reasons can also adjust fees based on the reasons for dropping or withdrawing from classes. The [Adjustment Calendar](#) controls how the system adjusts term and class fees. Don't hesitate to contact your Student Financials office to learn more about adjustment reason codes.

1. The **Enrollment Action Reason** search criteria page displays.
2. Select the **Add a New Value** tab to create a new Enrollment Action Reason.
3. Enter or look up the **SetID**.
4. Activate the **Academic Career** drop-down menu and choose the appropriate Academic Career.



5. Enter or look up an **Enrollment Action**. Select the looking glass to choose a value from the search results.



6. Enter a four-character **Enrollment Action Reason** and select **Add**. Example: Enrollment Action Reason MIL1 displays in the image below.

[← Student Homepage](#)
Enrollment Action Reason

Enrollment Action Reason

SetID

Academic Career

Enrollment Action

Enrollment Action Reason

[Find an Existing Value](#) | [Add a New Value](#)

7. The Enrollment Action Reason Table page displays.
8. The **SetID**, **Enrollment Action**, **Reason Code**, and **Academic Career** displays at the top of the page.

[← Student Homepage](#)
Enrollment Action Reason

Enrollment Action Reason Table

SetID WA070 **Academic Career:** Undergraduate

Enrollment Action: Drop

Reason Code MILI

Enrollment Action Reason Find | View All First 1 of 1 Last

*Effective Date	*Description	Short Description
<input type="text" value="07/14/2022"/>	Retain Drop Until Time Period <input type="text"/>	*Status <input type="text" value="Active"/>

Enrollment Action Reason panel:

9. **Effective Date:** The Effective Date defaults to the system date. Enter **01/01/1901** for a new Enrollment Action Reason.

Student Homepage Enrollment Action Reason

Enrollment Action Reason Table

SetID WA070 Academic Career: Undergraduate

Enrollment Action: Drop

Reason Code MILI

Enrollment Action Reason Find | View All First 1 of 1 Last

<p>*Effective Date</p> <input style="width: 90%;" type="text" value="01/01/1901"/>	<p>*Description</p> <p>Retain Drop Until Time Period</p> <input style="width: 95%;" type="text"/> <input style="width: 20px; height: 20px; vertical-align: middle;" type="text"/>	<p>Short Description</p> <p>*Status</p> <input style="width: 95%;" type="text"/> <p>Active</p>
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Save Notify Add Update/Display Include History Correct History

10. Enter a **Retain Drop Until Time Period Description**. You can associate an action reason with a time period for enrollment drop actions.
 - The **Short Description** and **Status** auto-populates.
11. Below the Description field, click the looking glass to choose a time period from the Look Up Retain Drop Until Time Period menu.

Student Homepage Enrollment Action Reason

Enrollment Action Reason Table

SetID WA070 Academic Career: Undergraduate

Enrollment Action: Drop

Reason Code MILI

Enrollment Action Reason Find | View All First 1 of 1 Last

<p>*Effective Date</p> <input style="width: 90%;" type="text" value="01/01/1901"/>	<p>*Description</p> <p>Retain Drop Until Time Period</p> <p>Military - 100%</p> <input style="width: 95%;" type="text"/> <input style="width: 20px; height: 20px; vertical-align: middle;" type="text"/>	<p>Short Description</p> <p>*Status</p> <p>Active</p>
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Look Up Retain Drop Until Time Period Help

SetID WA070

Academic Career UGRD

Time Period =

Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-13 of 13 Last

Time Period	Description
No Access	No Access Granted
Pre-Rgstrn	End of Pre-Registration
End 1st Wk	End of First Week
End 2nd Wk	End of Second Week
End 3rd Wk	End of Third Week
End of Add	End of Add
Permission	Enroll w/ Permissions
End Drp/Ad	End of Drop/Add
End of Drp	End of Drop
Mid-Sessn	Mid-Session
End Term	End of Term
End Grd Pd	End of Grading Period
Forever	Forever

Save Notify Add Update/Display

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- ZD SACR Student Rec Config

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12. **Note: Time Period** values are established on the **Time Period Table**.

Navigation: NavBar > Navigator > Set Up SACR > Product Related>Student Records > Enrollment > Time Period Table

Academic Career		UGRD		Undergraduate	
*Time Period	*Description	*Short Description			
000	No Access Granted	No Access	+	-	
100	End of Pre-Registration	Pre-Rgstrn	+	-	
110	End of First Week	End 1st Wk	+	-	
120	End of Second Week	End 2nd Wk	+	-	
130	End of Third Week	End 3rd Wk	+	-	
135	End of Add	End of Add	+	-	
138	Enroll w/ Permissions	Permission	+	-	
140	End of Drop/Add	End Drp/Ad	+	-	
145	End of Drop	End of Drp	+	-	
150	Mid-Session	Mid-Sessn	+	-	
300	End of Term	End Term	+	-	
400	End of Grading Period	End Grd Pd	+	-	
999	Forever	Forever	+	-	

13. Select **Save** in the lower-left corner of the page.

Enrollment Action Reason Table

SetID WA070

Academic Career: Undergraduate

Enrollment Action: Drop

Reason Code MILI

Enrollment Action Reason

Find | View All First 1 of 1 Last

*Effective Date	*Description	Short Description	*Status
01/01/1901 	Retain Drop Until Time Period Military - 100% 999  Forever	Military -  	Active 

 Save  Notify

 Add  Update/Display  Include History  Correct History

14. Process complete.