9.2 Student Program/Plan FAQs

Purpose: This quick reference guide highlights frequently asked Student Program/Plan questions.

Audience: Student Records Staff

Upon matriculation, the student record is available on the Student Program/Plan page. Student Program/Plan is a component that compiles and tracks a student's program, plan, sub plans, and other information. Program changes (program changes, plan changes, data changes, discontinued, leave of absence, etc.) occur throughout the program's completion.

Student Program/Plan FAQs

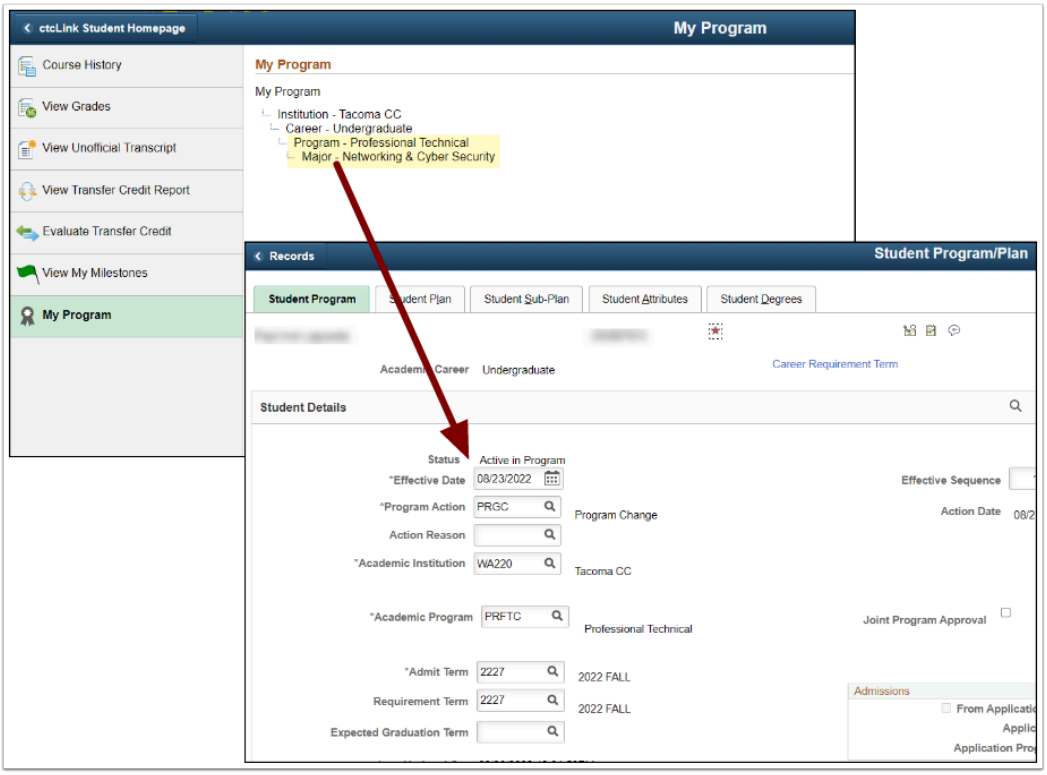
1. How does the Effective Date Impact PeopleSoft Functionality?

There are two dates associated with each stack change: the Action Date (when the change is recorded in PeopleSoft) and the Effective Date (when the student wishes for the change to take effect). To avoid negatively impacting the current term, changes to a student's Program/Plan must be **Effective Dated** between terms.

Effective Date. All new rows are effective dated. It is recommended that each row has an effective date after the previous row. Under exceptional circumstances, an effective date may need to be backdated. The backdated row must still have a date before the previous row. You will receive a message stating the following:

"The inserted EffDT is not within the range of effective dates in the prior and subsequent rows. The effective date in a row must fit into the sequence of other effective dates in the same scroll. It should be before the effective date of the row above it, and after the effective date of the row below it."

- The **Effective Date** controls when program/plan changes are visible on Student Homepage, Student Services Center, and Advisor Center. In the example below, it was not until 08/23/2022 that the PRFTC program/plan was displayed.



- The **Effective Date** indicates when the new program/plan will be used for the AAR run. Given this, the What-If Report allows selecting a future-dated program/plan.
- The updated term in Financial Aid Term will depend on the **Effective Date**.
  - **Note:** Financial Aid staff can view future effective dated changes if the student is term activated to that career number. Consequently, the effective date must be before or on the term begin date of the future term. With this in mind, Financial Aid staff may have to rebuild the term to see the plan change manually.

- Tuition calculations may be affected by **Effective Dating**.
- Suppose a Program/Plan change is required in the middle of a term, you will backdate the change before or on the term begin date. For example, your Financial Aid department requests that you change a student's plan because it should be coded in the Accounting AAS-T rather than a certificate. Contact your NSC reporter to adjust/correct the student's record directly with NSC.

Related QRGs:

1. 9.2 Producing an Academic Advisement Report
2. 9.2 Request a What-If Report
3. 9.2 View a Financial Aid Term
4. 9.2 Maintaining Student Program/Plan Stacks

2. How Can My Choice of Effective Date Cause NSC Errors?

When changes to program/plans that are effective for the prompted term have been effective-dated after the term begin date, errors may occur. For example, the program or plan reported for the student in the first file submission differs from the program or plan in the final file submission.

Related QRG:

1. 9.2 Generating a National Student Clearinghouse (NSC) Report

NSC Resources:

1. The National Student Clearinghouse Enrollment Reporting Programming and Testing Guide (September 2021) is based on the NSLDS Enrollment Reporting Guide and provides specific information about the structure of an NSC report
2. NSC's Secure FTP Help page is your best resource for using NSC's FTP site, which is where you will go to upload your NSC reports.
3. Subscribe to NSC's Compliance Central Blog to stay up-to-date on all things NSC.
4. Keep an eye on NSC's Event Directory for a schedule of live webinar training and, post-COVID stuff, in-person In Your Neighborhood meetings. NSC's webinars are critical resources for new NSC reporters and are useful refreshers for more established reporters.
5. Get a HEUG account! HEUG is an international group for colleges using PeopleSoft and is an essential resource for SMEs. There are forums, presentation files, and live WebExs about any PeopleSoft Campus Solutions topic. All ctcLink users have access to a HEUG account through SBCTC. You'll need to work with your PM to get a HEUG account.

3. Is it Necessary to Future Effective Date a Program/plan when We Matriculate an Admissions Application?

For new students, your matriculation date can be any day on or before the start date of their first term (a.k.a. Admit Term). If the student is matriculated for a future term, the matriculation effective date can fall within the current term. The system will prevent you from term activating for the current term. For additional information, visit the QRGs listed below.

Suppose a new student applies for fall on July 15. Since they will not be term activated for summer, it is okay to matriculate them as soon as the application is reviewed. There is no need to future date the matriculation. This actually will help downstream business processes rather than future dating the matriculation.

For example, you cannot assign an Advisor or a Milestone before the matriculation effective date. In order to avoid negative downstream impacts, you will not need to forward the date of matriculation unless it is an exceptional circumstance.

Related QRGs:

1. 9.2 Move an Admit Term after Matriculation
2. 9.2 Move an Admit Term after Matriculation Video
3. 9.2 Term Activate a Student after the Term Begin Date
4. 9.2 Term Activate a Student after the Term Begin Date Video

4. If We Effective Date a Month Before the Start of the Term, what Happens when We Hit that Date?

This is a local decision. As long as you keep the effective date between terms in mind, you will minimize negatively impacting other departments at your college. Click here for examples of what happens when you hit that date. It may be helpful to reach out through the CSSupport listserv or Registrars listserv to see what's worked best for different colleges. Here is the link to a complete list of distribution lists to join.

5. To Avoid/ Fix PPS Effective Date Errors, what Tools are Available to Me?

- QARS allows colleges to prevent coding mistakes affecting state and federal reporting. The data source is the SBCTC Master Data Views built using PeopleSoft application data.
- Queries:
  1. QCS_SR_TERM_ACT_INACTIVESTACK - Identifies term activations that do not have a valid.program/plan stack for the term on the career number listed. This causes tuition calculation issues.
  2. QCS_SR_PPS_TERM_EFFDT - Earliest date that can be used (usually) for PRGC\PLNC for the given term.
  3. QCS_SR_NSC_PROG_PLAN_CHANGES - Identifies program changes (program action PRGC) and plan changes (program action PLNC) using an effective date after the term begins. Note this will only identify issues with the "top" record in the PPS.
  4. QCS_SR_NSC_COMPL_EFFDT_ISSUES - Identifies completions with an effective date prior to term end date.
  5. QCS_SR_NSC_DISCONTINUED_STACKS - Identifies Program/Plan Stacks that were discontinued with an effective date before term end.
- To access the most up-to-date query information, visit dataservicesmetalink.sbctc.edu.

Related QRGs:

1. **Quality Assurance Reporting System (QARS)**