Program Change Request Online Workflow

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Program Change Request Start
For Advisors:

- Go to MyOSU. In Faculty/Advisor tab, click on the Web for Advisors link in Advisor Tool Kit portlet.
- Click on Program Change Request link.
- Select any term, and click submit.
- Next, type in the student ID and then click Submit.
- The system will identify the student and display the student's name.
- Click Submit again.
- Click Request Program Change button, once.

- **IMPORTANT:** Click on the Request Program Change link **ONLY ONE TIME** to start the workflow. Each additional click will create a duplicate request.

- Next, you will be presented with Banner Workflow. Click on the workflow link to open the workflow.
- Click on the workflow associated with the student and start entering the program change information. (See the image below.)

**NOTE:** If you cannot find the workflow associated with the student that you have initiated, click the Worklist button to refresh the queue. It might take a few seconds for the workflow to appear in the queue. The Worklist button is located on the left hand-side menu navigation.

**Entering New Program Information**

Once the workflow associated with the student is open, start entering the new or updated program information as shown below:

**NOTE:** Please read the instructions carefully. Information submitted through this step will be exactly the way the student’s records will be updated. Any options, minors, majors that were on student’s
records before and not listed here, will be assumed as dropped from the student’s curriculum record.

**NOTE:** If there are any program details that student will keep (existing major, minor, option,...) but these details cannot be selected using the dropdown menus, please provide a comment in the comment box about the details of the program that need to remain on student’s curriculum.

- Effective Term dropdown will only show terms that can be selected. For example, if it is past week 2 of the current term, effective term is defaulted to the next available term.

- Use the dropdown lists Primary Curriculum, Secondary Curriculum, and Minors to enter student’s program information.
- Any current degrees, majors, minors, and options that the student would like to continue in is also listed here.

**NOTE:** Student’s current program information is listed to the right of each program detail dropdown menus.
NOTE: If the student has a major, minor, and/or option from another college that they would like to keep, please list these programs as they should continue to appear on student’s program record. Since the student is not entering the other college for the first time and has been majoring in the other college’s program, there is no need for a repeated advisor approval from the other college.

Below the Comments section, you will see, Graduation Term. This field will be populated if the student is a candidate for graduation.
Select Degree Type, Campus, College, Major, Option in the order specified. The list of items available in each dropdown is determined by what has been selected prior to this item. For example, if you select degree type BA, then the next dropdown “campus” will list only the campuses that offer the degree type BA. Then the college list then is narrowed down to the degree type and campus that has been selected.

Enter all details of student’s secondary as it should appear in the Second Curriculum dropdown list record.

**NOTE:** Secondary Curriculum Degree dropdown menu will list Certificate “CERT” as a degree type. The Certificate codes are listed as options for Major 1 and Major 2 fields. ONLY advisors authorized to admit students into the CERT program use this degree type.
- Add the minors in the minor dropdown menu.

- Review program information one more time to make sure it is all accurate. If all is well, click in the “check” box next to the statement “I approve of this change as requested by the student” and then click Complete.

- The workflow is now sent to the next step.

**Approving a Program Change Request**

For Head Advisors:

- You will receive an email from workflow that you have a program change request awaiting to be approved. See the email below.
From: Tursynay.Issbekova@oregonstate.edu
Sent: Tuesday, February 20, 2018 8:38 AM
To: 
Subject: Change of Program Proposal

Hi Jacob,

You have a change of program request for Test Person REGISTRAR, Janellanna - 931525424 awaiting your approval. Please log into Workflow to approve, deny, or rollback this request.

Thanks,
Office of the Registrar
Oregon State University

- Click on the Workflow link provided in the email and log into workflow.
- Click on the program change request in the workflow queue.
- Available options for this step are Approve, Deny, and Rollback.

Approve – moves the workflow to Office of the Registrar.

Deny – ends the workflow.

Rollback- sends the workflow to the advisor who submitted it. Comment needs to be added for advisor to act upon.

- Select Approve and click Complete to send the workflow to the Office of the Registrar for processing.

- Once the Office of the Registrar has finished processing the request, an email is sent to student as shown below.
Troubleshooting Workflow

How do I return a workflow back to the queue?

**Q:** I accidentally clicked on the wrong workflow and now it not visible to other advisors in my college/department.

**A:** It is simple to release the claimed workflow back to the queue. Click on the small magnifying glass icon that located at the end of the workflow item in the queue. See image below.

- Then click on the Release button.

How do I stop a workflow?

**Q:** I started a program change request for the wrong student. How do I stop the workflow from going forward?

**A:** Click on the small magnifying glass icon that located at the end of the workflow item in the queue. See image below. And, then click on the Stop Workflow Request button.

How do I delete a duplicate workflow?

**Q:** I clicked on the Program Change Request button twice by accident, and now there are two workflows for the same student in the queue. How do I end one that I don’t need?
A: Stop the unwanted workflow by clicking on the small magnifying glass icon and click the Stop Workflow Request button. The unneeded duplicated workflow is now ended.