# MANAGING GRADUATION APPLICATIONS

# TABLE OF CONTENTS

Revision History2
Introduction and Purpose2
Related Policies, Regulations, Guiding Principles, and Common Practices2
Impacted Departments, Units, Programs, and Centers2
Before You Begin
Pages
Procedures
Viewing a Student's Application to Graduate in Banner3
How to Approve a Student to Graduate6
How to Cancel a Student's Application to Graduate8
How to Proceed if the Registrar Returns the Student Application to the College
How to Update Banner and Degree Works for an Undergraduate Student Who Has Completed the College-Specific Application to Graduate
How to View When a student has been sent a Confirmation or a denial email11
How to View When a Student's Degree Has Been Awarded12
Final Quiz13

# **REVISION HISTORY**

Version	Date	Name	Description
2	Feb 2017	Kari	Added PM code; added section on seeing confirmation and denial emails; updated policies re: deadlines
3	July 2018	Tammy W.	Updated for Banner 9

## INTRODUCTION AND PURPOSE

The purpose of this document is to explain how graduation applications are managed in Banner. Specifically, it outlines how to view an application a student has filed, how to approve or deny it for graduation, and how to view a conferred degree for a student. Academic Advisors will utilize these procedures to manage graduation applications students have filed in self-service Banner and to communicate with the Registrar's Office on the status of whether degree requirements have been met.

## RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

- 1. Undergraduate R6 Campus Graduation Requirements (En 5 May 81)
  - a. http://senate.ucr.edu/bylaws/?action=read\_bylaws&code=r&section=06
- 2. Deadlines have been reviewed and established for application deadlines equivalent to July 1 for summer and fall, Dec 1 for winter, and Mar 1 for spring for undergraduates and the third Monday of the term for graduate students. It has been agreed that the application will open on the first day of enrollment for a term.
- 3. Students must have their legal name printed on their diploma.
- 4. The Registrar's Office confers all degrees after receiving the College or Graduate Division Academic Affairs approval.
- 5. Students must apply for each degree and major they are planning to graduate with in self-service Banner. Undergraduate students will also be required to complete the College's application for each major with the exception being when all majors are in the same College.
- 6. Eligibility rules for students in each College vary and will be coded in Banner according to what has been requested. Undeclared/non-finite majors cannot apply for graduation. UG CHASS and SB students – no restrictions; UG BCOE must have 135 units and CNAS students must have 125 units and terms to apply for are restricted by expected graduation date. Graduate students must be D2 for Doctoral and Masters must have 12 units. Medical students must be M4.
- 7. Colleges and Graduate Academic Affairs approve students for graduation only when their degree audit clears all requirements.
- 8. The catalog for each year states the requirements that must be met in order for a student to graduate with a degree and major.
- 9. Letters to students who do not meet graduation requirements will be sent on an ongoing, rolling basis. They are sent both by email and USPS mail.

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

- 1. College Offices and Academic Advisors
- 2. Registrar
- 3. Graduate Division Academic Affairs
- 4. Medical School Student Affairs Office

## **BEFORE YOU BEGIN**

If this is the first time you are reviewing this procedure, go to R'Space and click on the Banner Training icon in order to follow along. Please contact IT for trouble accessing the link.

## PAGES

The Pages listed below are covered in this training.

Page	Page Name	Description
SHAGAPP	Graduation Application	Graduation application information including application status, graduation dates, and curriculum.
SGASTDN	General Student	Current and historical information about a student, including curriculum, field of study, activities, veteran status, comments, and academic/graduation status.
STVTERM	Term Code Validation	A list of all term codes with descriptions, term start and end dates, the corresponding academic year, and housing start and end dates.
SHANCRS	Academic Non-Course	Non-course degree requirements such as a dissertation or thesis, project, College specific graduation application, or exam.
SHADEGR	Degree and Other Formal Awards	Information pertaining to degrees or other awards including graduation status, graduation dates, curriculum, honors, institutional and transfer courses, and non-course work.

# PROCEDURES

### VIEWING A STUDENT'S APPLICATION TO GRADUATE IN BANNER

When a student completes the Self-Service Banner application to graduate there will be data visible in SHAGAPP:

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The **Graduation Application Sequence** shows how many applications to graduate have been filed. In the example here, 2 applications have been filed. Previous applications can be viewed using the arrows to the left.

The Active check box indicates that the application is active. This is based on having an Application Status that we consider active such as: AC (Application Filed), CA (College Approved), NR (Needs College Review), PM (College Resolving Problem), ON (One degree approved; Cont on), or RA (Registrar Approved).

The **Application Date** is when the student submitted the application through self-service or an advisor filed the application on the student's behalf. This should not be changed.

The **Application Status** is the key field that says where the student's application is at in the degree conferral process; it is also the field where staff manage the application. A report is available to view and manage student applications and facilitate communication between the Registrar and the College. Note that once the application status is changed to DN (Does not meet requirements) or IA (College deferred application), the action cannot be reversed because these are inactive statuses. Students can view their graduation application in self-service after it has been filed if their application has a status that is considered active (AC, CA, NR, PM, ON, or RA). Students cannot cancel or change their application through self-service after they have submitted it; this must be done by staff.

The **Application Status Date** populates with the date the application was submitted by the student (or filed by an advisor on behalf of a student).

The **Graduation Information section** is automatically populated with all necessary information when the student fills out the self-service application.

The **Curricula Summary section** shows the curricula the student selected to apply for in self-service. There are two records for each curricula – one is titled Student Outcome (meaning a degree record in SHADEGR) and the other is Student (meaning it is the same as the SGASTDN learner record).

If the student is applying to graduate with more than one degree or major, there will be an application associated with each degree or major. The application for each degree and/or major is managed separately and therefore for students with 2+ majors the Curricula Summary changes when another application is viewed.

If a student applies to graduate *with the same curricula more than once* the Curricula Summary section will be blank on the first application(s). This is because the curricula can only be associated with one graduation application. For example, the student below applied 3 times with the same curriculum. Even though the Curricula Summary is blank in the first and second applications, it can be inferred that the Curricula was identical to the Curricula in the third application. <u>Please note</u>, when a manual graduation application is submitted, SHAGAPP will automatically open and display only that current graduation application. You can close any open pages (SGASTDN and SHAGAPP), then reopen SHAGAPP, in order to view all the student's graduation applications.

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#### HOW TO APPROVE A STUDENT TO GRADUATE

If the student has cleared all graduation requirements, follow the steps below:

- 1. Go to **SHAGAPP**.
- 2. Enter SID. Next section (Alt + Page Down) or Go button
- Use the arrow buttons (1 of 3) to select the active application for the curricula you are approving. An application is active if the Active checkbox is checked.
- 4. The **Application Status** should say either **AC** (application status has not been updated), **PM** (application has been reviewed by college office and problem is being resolved) or **NR** (application has been reviewed by Registrar and they have asked for an additional review by the college office).
- 5. The **Curricula Summary** and **Graduation Term** are displayed for reference in locating the correct application.

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- 6. If the student has met all requirements, change the Application Status to CA (College Approved) *if all requirements on the degree audit are clearing.*
- 7. Note: The Graduate Division Academic Affairs should use code ON (One degree approved; Cont on) instead of CA when a student is earning a master's degree and continuing at UCR for another degree such as a PhD. This will ensure the student's SGASTDN record remains active to pursue the second degree. This code should not be used for an undergraduate student who is planning to continue as a graduate student at UCR.
- 8. SAVE. This status update signifies to the Registrar that the record has been approved and ready to be reviewed.

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If the student will clear all graduation requirements pending the resolution of a problem, follow the steps below:

- 9. If you have identified a problem causing the student's degree not to be approved, but are in the process of resolving the problem, you may optionally use the **PM (College Resolving Problem)** to note that in the Application Status. This code is optional to use and does not change the deadline for when the student's record must be approved or denied by the college.
- 10. **SAVE**. This status update signifies to the Registrar that the record is *not* ready to be reviewed. Applications with **PM** will need to be internally monitored and updated to approved status (see #6-8) once the problem has been resolved in order to notify the Registrar's office that the application is ready to be reviewed.

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### HOW TO CANCEL A STUDENT'S APPLICATION TO GRADUATE

1. Go to **SHAGAPP**.

- 2. Enter SID. Next section (Alt + Page Down) or Go button
- 3. If the application (with curricula) you want to cancel doesn't appear, use the arrow buttons to find it. ▲ ① of 3 ▶ ▶ Once found, change the application status to the appropriate value: IA for college deferred application or DN for does not meet requirements. DN is a denial due to requirements not being met and will generate a letter and email sent by the Registrar to the student notifying the student that the degree requirements have not been met. The letter directs the student to contact their College for further information. Do not delete applications from SHAGAPP.
- 4. SAVE. Please note that this action cannot be undone.

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When another application needs to be filed, please ask the student to fill out another application in self-service. If the deadline has passed for the student to do this, please work with the designated point person in your college to file an application on behalf of a student.

**Note:** When there is an active graduation application on file and the student tries to file an application before you have canceled it, they receive a message that says "no curricula available for graduation". The student will not be able to file another application in self-service for this curricula until you have updated the application status to IA or DN. If you will be re-filing the application on behalf of the student, once you have entered IA or DN, wait 10 minutes before filing the new application so the degree record in SHADEGR can be cleared out.

Graduation applications with a status of IA or DN will remain in SHAGAPP. The outcome record in SHADEGR that is associated with these applications will be cleared by an ITS job which allows the student to apply again for the same curriculum (runs every 10 minutes). In addition, the row in SHANCRS indicating that the student has completed the college specific application to graduate will also be cleared to ensure the degree audit states this requirement is incomplete, as the student is required to file this again.

#### HOW TO PROCEED IF THE REGISTRAR RETURNS THE STUDENT APPLICATION TO THE COLLEGE

After you have entered CA or ON into the Application Status field, the Registrar will review the record and confer the degree. If the Registrar staff identify an error or have a question regarding the student's degree audit, they will enter **NR (Needs College Review)**. Please review the report to identify these students, as the responsibility to review the student record now lies with the College.

Please review the record and make any appropriate notes or changes. If you have identified a problem causing the student's degree not to be approved, but are in the process of resolving the problem, you may optionally use the **PM (College Resolving Problem)**. Please note the PM code does not extend the amount of time the college has to review the record. If the student does *not* meet requirements, please enter **IA (College Deferred Application)** or **DN (Does Not Meet Requirements)**. DN will generate an email and a paper letter to be sent from the Registrar to the student notifying the student that the degree requirements have not been met.

If the student *does* meet requirements, ensure the degree audit clears and enter CA (College Approved) or, for the Graduate Division, ON (One degree approved; Cont on) if the student is continuing on for another degree at UCR.

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# HOW TO UPDATE BANNER AND DEGREE WORKS FOR AN UNDERGRADUATE STUDENT WHO HAS COMPLETED THE COLLEGE-SPECIFIC APPLICATION TO GRADUATE

All degree-seeking students initiate the application to graduate in Banner self-service. Undergraduate students in CHASS, CNAS, BCOE, and SB have an additional action step that must be fulfilled in order for their application to be considered complete. That second step is to fill out the college-specific application to graduate.

The link to the college-specific application to graduate is only available to undergraduates who have completed the first step in Banner self-service. The link to each college is provided on the confirmation page and also in an email that is sent to the student. For some students, the degree audit indicates a graduation requirement for undergraduates is to complete the college-specific application to graduate. For BCOE and CNAS students this requirement appears in the audit once the student has achieved senior class standing. CHASS and SB students do not have this requirement showing in the audit.

In order to clear this requirement on the student's degree audit, take the following steps:

- 1. Go to SHANCRS.
- 2. Enter SID. Next section (Alt + Page Down) or Go button
- 3. On an empty row in the **Academic Non-Courses section**, enter the following code in the **CAPP Non-Course Requirement** field for the appropriate college:

Go

Code	Description	ACTIVITY DATE
GABU	SOBA UG App to Graduate	06/08/2015
GAEN	BCOE UG App to Graduate	06/08/2015
GAHS	CHASS UG App to Graduate	06/08/2015
GANA	CNAS UG App to Graduate	06/23/2015
ORIN	Orientation Exam Inorganic	10/13/2016
OROR	Orientation Exam Organic	10/13/2016
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- 4. In the **Status** field, enter **C** for **Complete**.
- 5. **SAVE**. The student's degree audit will be updated to check off the requirement as complete according to the University's refresh schedule or when an advisor refreshes it.

#### HOW TO VIEW WHEN A STUDENT HAS BEEN SENT A CONFIRMATION OR A DENIAL EMAIL

There are two types of letters sent to students related to graduation.

Students receive a confirmation email that their application in R'Web was received. The email is sent within 24 hours of the student applying in R'Web. The undergraduates receive the URL for the college specific application which is the second step of the process. A confirmation email is not sent when an advisor manually files the graduation application. To view when a letter has been sent to a student, follow the directions below.

Students who are assigned a DN (Does Not Meet Requirements) code by the College will be sent a letter by the Registrar telling the student that they do not meet requirements to graduate. The letter is sent by email and USPS mail and refers the student to contact their College for questions about their requirements. To view whether a letter has been sent to a student, follow the directions below.

- 1. Go to SUAMAIL
- 2. Enter the SID. Next section (Alt + Page Down) or Go button
- 3. Execute the Query (F8). Remember to do this step; skipping this step results in a blank screen where no records can be seen.
- 4. The letter code **RO\_GRADAPP\_HSTX** is the letter to students confirming their application to graduate in R'Web is complete. Please note that the '**HS**' in the code above indicates the CHASS letter was sent; replace HS to locate an email sent to a student in another college (**BU, EN, ED, NA, PP**). The date indicates when the student received the email.

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5	201740	Student			RO_GRADAPP_HSTX	Grad App Confirmation - CHASS	09/26/2017	09/26/2017						
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S	201740	Student			RO_GRADAPP_HSTX	Grad App Confirmation - CHASS	09/26/2017	09/26/2017						
5	201740	Student			RO_GRADAPP_HSTX	Grad App Confirmation - CHASS	09/27/2017	09/27/2017						
5	201740	Student			RO_GRADAPP_HSTX	Grad App Confirmation - CHASS	09/27/2017	09/27/2017						
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5. The letter code **GRAD\_NOT\_MET** is the letter to students who did not meet graduation requirements. The date indicates when it was sent via email and USPS mail.

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s	999999	Student			GRAD_NOT_MET	Graduation regmnts not met	01/25/2018	01/25/2018	Generated					
s	201810	Student			AR_FRA_ERROR	Financial Reponsibility Agreeme	12/11/2017	12/11/2017						
s	201810	Student			AR_SBS_REMINDER	Fees/Tuition Reminder	12/04/2017	12/04/2017						
s	201810	Student			AR_SBS_REMINDER	Fees/Tuition Reminder	12/15/2017	12/15/2017						
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5	201810	Student			RO_CONT_ALL_TXT	Reg New Term Continuing All	10/31/2017	10/31/2017						
8	201740	Student			AR_SBS_REMINDER	Fees/Tuition Reminder	09/06/2017	09/06/2017						
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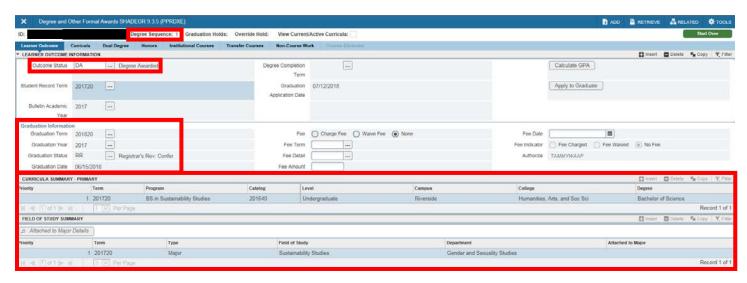
### HOW TO VIEW WHEN A STUDENT'S DEGREE HAS BEEN AWARDED

- 1. Go to **SHADEGR**.
- 2. Enter SID.
- 3. Enter the Degree Sequence (1 for the first degree earned, 2 for the second degree earned, etc.) that corresponds to the

degree you are wanting to confirm. Next section (Alt + Page Down) or Go button

Tip: Click the \_\_\_\_\_ next to Degree Sequence if you are unsure which number to enter. This will open the SHADGMQ Page. Choose the degree you want to view from the list.

4. You will know the degree has been conferred by the Registrar when you see **DA (Degree Awarded)** in the **Outcome Status field** and **RR** (Registrar's Rev; Confer) or **RC** (Registrar's Rev; Confer Cont) in the **Graduation Status field**. The **Graduation Term** and **Graduation Date** indicate the conferral date the degree was earned.



## FINAL QUIZ

- 1. What field gives you the main information on where the student's application is at in the degree approval process?
  - A. A) Application Status
  - B. B) Graduation Status
  - C. C) Active check box

Answer: A

- 2. When a student is applying to graduate with more than one degree or major, there will be an application associated with each degree or major. TRUE
- 3. Students can select any name to display on their diploma as long as it is close to their legal name. FALSE
  - A. The student must have their legal name on the diploma.
- 4. If the Curricula Summary section in SHAGAPP is blank it means that the student did not complete the application to graduate. FALSE
  - A. A blank Curricula Summary means that the student has filed more than one application with the same curricula and did not graduate the first time. In this case, it can be inferred that the curricula on the current application was also the curricula on the prior application(s).
- 5. College staff will be reviewing graduation applications that are active and have an Application Status of AC (Application Filed) or NR (Needs College Review). TRUE
- 6. It is okay to place a CA (College Approved) status in the Application Status even if the student's degree audit does not clear but you know the student has met the requirement. FALSE
  - A. The College should not approve a student to graduate if their degree audit is not clearing. If you need assistance with the degree audit please contact the Registrar's Office for help in resolving the error you are receiving or if the student should be given an exception please add the appropriate waiver to the degree audit.
- 7. You have an undergraduate student who is graduating and continuing on at UCR for their graduate program. Should you code the student with ON (One degree approved; Cont on) when you have approved the undergraduate degree? Yes or No
  - A. NO; the ON status is only used at the graduate level. It allows for a student who is pursuing two degrees to complete and graduate from one and continue with the other degree. An example is a student who receives their masters, but continues on to receive their PhD.

- 8. What is the fundamental difference between the use of the IA (College Deferred Application) and DN (Does Not Meet Requirements) Application Status codes?
  - A. A) There is no difference so you can select either one.
  - B. B) The DN code will trigger an email and letter to be sent to the student from the Registrar's Office formally notifying the student that the degree requirements have not been met. The letter directs the student to contact their College for further information.
  - C. C) The IA code will trigger an email and letter to be sent to the student from the Registrar's Office formally notifying the student that the degree requirements have not been met. The letter directs the student to contact their College for further information.

Answer: B

- D. Student X knows he is not going to graduate once he received his grades for the quarter, so he logs on to submit a new graduation application for the next quarter. Can he submit another application before you complete your review of his current application? Yes or No
  - i. Answer: NO. The application must be changed to IA or DN before the student can apply for the same program again in self-service.
- E. Once you have made a graduation application inactive by placing an IA or DN it cannot be undone. TRUE
- 9. The Registrar's Office will only return the student to the College Office if a problem or question is found. TRUE
- 10. All NR (Needs College Review) must be reviewed by the College and appropriately updated with a new status based on if the student did or did not satisfy the degree requirements. TRUE
- 11. Undergraduate students must complete both the Banner self-service application and their College graduation application. TRUE
- 12. What Page will you use to update that a student has submitted their College graduation application?
  - A. A) SHATRNS
  - B. B) SHACRSE
  - C. C) SHANCRS
    - Answer: C
- 13. The only field you have to complete in SHANCRS is the CAPP Non-Course Requirement field. FALSE
  - A. You have to complete that field, but you also must place a C in the Status field to mark it Complete. Both fields must be appropriately updated for Degree Works to show information correct to the student.
- 14. If a GRAD\_NOT\_MET letter is present on the student's record, this indicates that the Registrar's office has notified the student by email and by USPS mail that they did not meet the requirements to graduate. TRUE
- 15. After entering the SID and selecting Next Section, the list of letters to scroll through will appear. FALSE
  - A. You must Execute Query (F8) after selecting Next Section in order to be able to view the letters on the student's record.
- 16. All graduation application confirmation emails will be located under the code RO\_GRADAPP\_HSTX. FALSE
  - i. RO\_GRADAPP\_BUTX should be used for SB graduation applications
  - ii. RO\_GRADAPP\_ENTX should be used for BCOE graduation applications
  - iii. RO\_GRADAPP\_EDTX should be used for GSOE graduation applications
  - iv. RO\_GRADAPP\_NATX should be used for CNAS graduation applications
  - v. RO\_GRADAPP\_HSTX should be used for CHASS graduation applications
  - vi. RO\_GRADAPP\_PPTX should be used for SPP graduation applications
- 17. The official conferred degree can be confirmed on SHADEGR. TRUE
- 18. The degree conferral Page is updated by the College Offices once all degrees are reviewed. FALSE
  - A. This Page (SHADEGR) is updated only by the Registrar's Office once the College Office and the Registrar's Office agree a student has satisfied all degree requirements.
- 19. If a student has earned more than one degree at UCR there will be more than one Degree Sequence number in SHADEGR. TRUE