HOW TO MAKE STUDENT ADJUSTMENT FOR TARGETS, WAIVERS, AND SUBSTITUTIONS
Student Adjustment Library Form" (SMASLIB)
Student Adjustments for Targets, Waivers and Subs Form" (SMASADJ)

General:

When an individual student needs to have their program or area requirements modified, these changes can be made using student adjustment forms. Student adjustments are program specific and student specific. Student adjustments have the ability to target a course into a specific area, substitute a regular course requirement with another, and waive a course requirement with or without credits, and so on. This document describes the forms and procedures used to make these types of adjustments.

There are two main forms used for targets, waivers, and substitutions. They are:

- Student Adjustment Library Form (**SMASLIB**)
  This form is used to:
  - Add a student to the student adjustment library
  - Query a student and view his/her adjustment history
  - See p. 2-4 for details

- Student Adjustments for Targets, Waivers and Subs Form (**SMASADJ**)
  This form is used to:
  - Create Targets to use a course to fulfill requirements towards a specific area, when that course can be used to fulfil more than one area in the degree evaluation report.
  - Create Waivers that waive requirements for an individual student, with or without credit
  - Create Substitutions that allow a student to replace a required course with another course
  - See p. 5-9 for details

Remember: The bottom left of the form displays errors and warnings. This area is referred to as the auto-hint line and should be consulted if you are experiencing any problems. Even if you are not experiencing difficulties you should always keep an eye on this bar, especially if you are updating fields, as it provides important information such as warnings and errors that do not necessarily block your progress.

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Created by Sabrina Liu
SMASLIB_SMASADJ.doc

Last edited on March 31, 2003
Last printed 4/9/2003 2:01 PM
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Accessing the "Student Adjustment Library Form" (SMASLIB)

Type the name of the form SMASLIB in the Direct Access field.

The adjacent screen will appear:

This library is used to store information on all students who have had student adjustments made. All students must first be entered in the Student Adjustments Library before any adjustment can be made to their program requirements.

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

How to use this form:

Before making any adjustment, the student must exist in the student adjustment library.

To search for a student, you can search by ID or by name. If the student does not exist in the library, you can add their ID by clicking on ADD ID in the Options menu.

From there you can adjust the student's program requirements, area requirements, target courses, waivers and/or substitutions.

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Fields that have a red check mark (✔) in the **Req'd** column are required fields and need to be filled in with the appropriate data (see **Explanation/Description** column for details).

Req'd	#	Field	Action	Reaction	Explanation/Description
HOW TO QUERY THE STUDENT ADJUSTMENT LIBRARY FORM					
✔	1.	ID	Enter the student's ID or perform a search if you don't know it (see "Searching for a student" instructions below).	If you performed a search a list of IDs that exist in the student adjustment library and match the criteria entered will appear. The Options menu will also become active.	The McGill Identification number and full name of the student.

The student you wish to adjust must exist in the adjustment library. If the student does not exist in the library, you must click on ADD IDs in the Options menu. (See A below). |
| | 2. | Name | | | |
| **Searching for a student:**

If you wish to search for a particular student, click on the **Enter Query** icon or press F7 and enter all or part of the name or ID number (using a % as a wildcard character if entering part of the name or number). To Execute the Query, click on the **Execute Query** icon or press F8.
If you wish to search for students under a certain type(s) of adjustment(s), click on **Enter Query** or Press F7 and check the box(es) corresponding to the type of the adjustment in the ADJUSTMENT window, then **Execute Query**. | | | | | |

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Req'd	#	Field	Action	Reaction	Explanation/Description
		HOW TO ENTER A STUDENT IN THE STUDENT ADJUSTMENT LIBRARY			
✓	A.	On the Options menu, click on "**Add ID's**". Enter the student's ID in the ID field or click on the flashlight to search for the student number. **Save** (using the Save icon on the toolbar or pressing F10). Click the **Return** button.	After the student number has been entered, the student's name will appear.	This is the student who you will add to the Student Adjustments Library. You can now apply adjustments to this student.	
	B.	Place your cursor on the ID number of the student for whom you wish to make an adjustment. • Click on "Student Program Adjustment" in the Options menu to adjust the student's overall program requirements. This will bring up the "Student Program Adjustment Form" (SMASPRG). • Click on "Student Area Adjustment" to adjust a specific area requirement. This will bring up the "Student Area Adjustment Form" (SMASARA). • Click on "Student Group Adjustment" to adjust a specific group requirement. Note: Groups are not currently used at McGill. This will bring up the "Student Group Adjustment Form" (SMASGRP). • Click on "Student Adjustment for targets, waiver and substitutions" to make these adjustments. This will bring up the "Student Adjustment for Targets, Waivers and Subs form" (SMASADJ).			
		Adjustments: (individual adjustments are described below) These fields are display only. Any adjustments to a student's program, area, etc. will be checked off here. It also can be used to query for certain type(s) of adjustment by checking off the corresponding box in query mode (see details above in #1).			
	3.	Program			Program adjustment. If the check box for Program is checked, a Program adjustment is in effect for the corresponding student.

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Req'd	#	Field	Action	Reaction	Explanation/Description
					Program adjustments include changing the total minimum credit requirement to complete the program; modifying the lowest minimum grade that can be used within the program and waiving a whole area requirement from a program for an individual student (e.g. waive a CEGEP area requirement).
	4.	Area			Area adjustment. If the check box for Area is checked, an Area adjustment is in effect for the corresponding student. Area adjustments include changing minimum area credit requirements for a particular area; modifying minimum course grade for the area or for a specific course and adding or eliminating course requirements, etc.
	5.	Group			Groups are not currently used at McGill. No Group adjustment should be made accordingly.
	6.	Target			Target adjustment f the check box for Target is checked, a Target adjustment is in effect for the corresponding student. A Target adjustment can be used to use a course to fulfill requirements towards a specific area, when that course can be used to fulfil more than one area in the degree evaluation report.
	7.	Waiver			Waivers adjustment. If the check box for Waivers is checked, the Waivers adjustment is in effect for the corresponding student. Waivers adjustment is to waive requirements for an individual student, with or without credit.
	8.	Substitution			Substitutions adjustment. If the check box for Substitutions is checked, the Substitutions adjustment is in effect for the corresponding student. Substitutions adjustment is to allow a student to replace a required course with another course

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Accessing the "Student Adjustments for Targets, Waivers and Subs Form" SMASADJ)

Type the name of the form SMASADJ in the Direct Access field.

The adjacent screen will appear:

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

How to use this form:

The ID of the student for whom you wish to adjust must be stored in the Student Adjustment Library.

You can click on the icons in the main block to make adjustments, e.g. Targets, Substitutions, and Waivers.

Req'd	#	Field	Action	Reaction	Explanation/Description
✔	1.	ID	Enter the ID of the student whose record you wish to adjust. You can also search for a student number by clicking on the	After the student number has been entered, the student's name will appear.	The McGill Identification number and full name of the student.

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Req'd	#	Field	Action	Reaction	Explanation/Description
			flashlight. If you have previously selected a student in SMASLIB, their ID should already appear in this field.		
✔	2.	Term	Enter the student's catalogue term in the Term field and tab. For students admitted prior to 200209, enter 200209 in the Term field.	The Catalogue field will automatically fill in.	Adjustment will be in effect as of the term specified.
	3.	Catalogue			
✔			Proceed to the **Next Block** by clicking the icon or by pressing Ctrl + Page Down on your keyboard.		
	A.	Adjustment Tracking			Audit Trail for student adjustment. See All Tracking below for details.

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HOW TO TARGET A COURSE

Targets are very useful when a course can fulfill several area requirements and you want the course to be used towards a specific requirement (e.g. ORGB 380 can be used to fulfil either International Business Concentration (MG_GMT_IBU) or Organizational Behaviour Concentration (MG_GMT_OBH). MG_GMT_IBU appears before MG_GMT_OBH in the degree evaluation, therefore, ORGB 380 will be used to fulfil MG_GMT_IBU first. To make ORGB 380 fulfil MG_GMT_OBH instead, you will have to target ORGB 380 towards that area.)

TO TARGET A COURSE towards fulfilling a specific area in degree evaluation, enter the subject code, course number, attribute (if applicable), and desired area.

The targeted courses will only be used in the specified area (and program, if one was entered) when Degree Evaluation is run.

Req'd	#	Field	Action	Reaction	Explanation/Description
	1.	From Term			Term the adjustment starts. Will default.
	2.	Maintenance			The Maintenance button is used to update or end an adjustment.
	3.	To Term			Term the adjustment ends. Will default.
✓	4.	Subject			Subject code of the course being adjusted.

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Req'd	#	Field	Action	Reaction	Explanation/Description
✔	5.	Course			Course number being adjusted.
	6.	Attribute			Attribute code. An attribute is given to courses that share common characteristics.
✔	7.	Area			Area code. Each program is comprised of one or more areas. Each area is comprised of the detailed requirements of a program. E.g. collection of courses.
	8.	Group			Not currently used at McGill.
Valid Programs: If you wish to associate the targeted course with a specific program, click next block and enter the program code.					
✔			Proceed to the **Next Block** by clicking the icon or by pressing Ctrl + Page Down on your keyboard.		
	9.	From Term			Term the adjustment starts. Will default.
	10.	Maintenance			The Maintenance button is used to update or end an adjustment.
	11.	To Term			Term the adjustment ends. Will default.
	12.	Program			Program student is currently enrolled in.
	13.	Program Description			Program description. Will default.
✔	A.	**Save**	**Save** your changes by clicking on the save icon or pressing F10.		
✔	B.		After saving, click **Adjustment Tracking** to enter		

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Req'd	#	Field	Action	Reaction	Explanation/Description
			an explanation for the adjustment made.		
✓		Return	Click to return to the main screen.		

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HOW TO ENTER A WAIVER

ENTERING A WAIVER: Enter the subject code, course number, and attribute (if applicable) of the requirement to be waived.

Req'd	#	Field	Action	Reaction	Explanation/Description
	1.	From Term			Term the adjustment starts. Will default.
	2.	Maintenance			The Maintenance button is used to update or end an adjustment.
	3.	To Term			Term the adjustment ends. Will default.
✔	4.	Subject			Subject code of the course being adjusted.
✔	5.	Course			Course number being adjusted.

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Req'd	#	Field	Action	Reaction	Explanation/Description
	6.	Attribute			Attribute code. An attribute is given to courses that share common characteristics.
	7.	Area	Enter the code of the area in which the waiver applies, if appropriate. If an area is not specified, the adjustment will be applied to all areas.		Area code. Each program is comprised of one or more areas. Each area is comprised of the detailed requirements of a program. E.g. collection of courses.
	8.	Group			Not currently used at McGill.
✓	9.	Action	Enter the appropriate waiver action code.		Student Adjustment Action Codes are used to further define the type of adjustment made for an individual student. By double clicking in the Action field, you can access the Action Code Validation table, which displays all action codes available to the form you are currently in, also displays the code descriptions, credit count indicator (Y/N), etc. Action Code for Waivers **ENC** - Exemption without credit **EWC** - Exemption with credit **PEC** - PreBanner Conv-Exempt with cr **PNC** - PreBanner Conv-Exempt w-out cr
	10.	Credits	If waived with credit, value must be entered. If waived without credit, leave credit field blank.		Credits awarded to the student. If you waive a course while still counting the credits, enter the appropriate number of adjusted credits. If the course is waived with credit, the student will not have to fulfil that course requirement and the adjusted credit value will accumulate towards the area/program minimum credit requirement.

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Req'd	#	Field	Action	Reaction	Explanation/Description
					If the course is waived without credit, the student will not have to fulfill that course requirement but will not receive credit towards the area/program minimum credit requirement.
Valid Programs: If you wish to associate the waived course with a specific program, click next block and enter the program code.					
✔			Proceed to the **Next Block** by clicking the icon or by pressing Ctrl + Page Down on your keyboard.		
	11.	From Term			Term the adjustment starts. Will default.
	12.	Maintenance			The Maintenance button is used to update or end an adjustment.
	13.	To Term			Term the adjustment ends. Will default.
	14.	Program			Program student is currently enrolled in.
	15.	Program Description			Program description. Will default.
✔		**Save**	**Save** your changes by clicking on the save icon or pressing F10.		
✔			After saving, click **Adjustment Tracking** to enter an explanation for the adjustment made.		
✔		Return	Click to return to the main screen.		

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HOW TO ENTER A SUBSTITUTION

ENTERING SUBSTITUTIONS: Enter the subject code, course number, and attribute (if applicable) of the original requirement.

Enter the subject code (e.g. HIST, or Z101), course number, and attribute (if applicable) which will substitute for the original requirement.

The original course will still appear as the requirement on the left-hand side of the degree evaluation, meanwhile, it will be fulfilled by the substitute course, appearing on the right hand side of the degree evaluation.

The substitute course should be entered exactly as it appears in the student academic history.
For example, if the student has Z101 250A in their academic history, it should be entered as Z101 250A as the substitute course. If instead you entered HIST 250, or Z101 250B, the substitution would not take effect.

Req'd	#	Field	Action	Reaction	Explanation/Description
	1.	From Term			Term the adjustment starts. Will default.
	2.	Maintenance			The Maintenance button is used to update or end an adjustment.
	3.	To Term			Term the adjustment ends. Will default.
✓	4.	Subject			Subject code of the original course requirement.

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Req'd	#	Field	Action	Reaction	Explanation/Description
✓	5.	Course			Course number of the original course requirement.
	6.	Attribute			Attribute code of the original course requirement. An attribute is given to courses that share common characteristics.
✓	7.	Subject			Subject code of the course substituting the original course requirement.
✓	8.	Course			Course number of the course substituting the original course requirement.
	9.	Attribute			Attribute code of the course substituting the original course requirement. An attribute is given to courses that share common characteristics.
	10.	Area	Enter the code of the area in which the substitution applies, if appropriate. If not specified, the requirement will be substituted in all areas.		Area code. Each program is comprised of one or more areas. Each area is comprised of the detailed requirements of a program. E.g. collection of courses.
	11.	Group			Not currently used at McGill.
✓	12.	Action	Enter the appropriate substitution action code.		Student Adjustment Action Codes are used to further define the type of adjustment made for an individual student. By double clicking in the Action field, you can access the Action Code Validation table, which displays all action codes available to the form you are currently in, also displays the code descriptions, credit count indicator (Y/N), etc. Action Code for Substitutions: **PSB** - PreBanner Conv-Substitution **SUB** - Substitution
	13.	Credits			Enter the full or partial credit value of the course as appropriate.

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Req'd	#	Field	Action	Reaction	Explanation/Description
					appropriate.
Valid Programs: If you wish to associate the substituted course with a specific program, click next block and enter the program code.					
✔			Proceed to the **Next Block** by clicking the icon or by pressing Ctrl + Page Down on your keyboard.		
	14.	From Term			Term the adjustment starts. Will default.
	15.	Maintenance			The Maintenance button is used to update or end an adjustment.
	16.	To Term			Term the adjustment ends. Will default.
	17.	Program			Program student is currently enrolled in.
	18.	Program Description			Program description. Will default.
✔		**Save**	**Save** your changes by clicking on the save icon or pressing F10.		
✔			After saving, click **Adjustment Tracking** to enter an explanation for the adjustment made.		
✔		All Tracking	Click on the **All Tracking** icon to view relevant information		This form displays the userid of the person that entered the adjustments, the date and the explanation of the adjustment if applicable.

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Req'd	#	Field	Action	Reaction	Explanation/Description
			regarding adjustments made for this student.		
✓		Return	Click to return to the main screen.		

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