9.0 TRAINING

Student Exceptions

Updated: August, 2010
Table of Contents

Overview .......................................................................................................................... 3
Notes .................................................................................................................................. 4
Course Directive .................................................................................................................. 5
Requirement Change ......................................................................................................... 10
Requirement Waiver .......................................................................................................... 14
Altering Existing Exception ............................................................................................. 17
Course Substitution .......................................................................................................... 24
OVERVIEW

Course Materials Overview
In this manual you will learn how to do the following:
- Complete a Course Directive of Substitute and Exclude
- Complete a Requirement Change
- Complete a Requirement Waiver
- Complete a Course Substitution

What is a Student Exception?
A student exception is the manipulation of a requirement or course for an individual student.

There are four primary types of student exceptions:
1. Course Directive
2. Requirement Change
3. Requirement Waiver
4. Course Substitution

The Course Directive allows you to either move a course into a specific requirement ("Substitute") or move an existing course out of a specific requirement ("Exclude"). The exception is only applied to the specified requirement, not throughout the Degree Progress Report.

The Requirement Change allows you to alter a requirement’s parameters – e.g., reduce the number of required credits in a requirement from 10 to 8.

The Requirement Waiver allows you to exempt a student from a requirement. This exception should not be confused with simply waiving a specified number of credits from a requirement, which would require a Requirement Change.

The Course Substitution is a straight substitution of one course for another throughout the Degree Progress Report. You only use a Course Substitution when you want a course to take the place of another course in every applicable requirement on the Degree Progress Report. Only select users have access to complete a Course Substitution; whenever possible, a Course Directive should be completed rather than a Course Substitution.
NOTES
COURSE DIRECTIVE

OVERVIEW
The Course Directive allows you to either move a course into a specific requirement ("Substitute") or move an existing course out of a specific requirement ("Exclude"). The exception is only applied to the specified requirement, not throughout the Degree Progress Report.

Navigation: Home > Academic Advisement > Student Advisement > Authorize Student Exceptions

Process:

Step 1: Click the “Add a New Value” tab or link

Step 2: Click the Add button
Step 3: Enter the following values on the “Authorize Student Exceptions” page

**Effective Date:** leave as default (current date) or back-date, if necessary

**Description:** enter an appropriate description for the exception

**Short Description:** enter an appropriate short description for the exception

**Long Description:** enter an appropriate long description for the exception

---

**Academic Institution:** leave as default (“UWMIL”)

**Academic Career:** enter “UGRD” (for “Undergraduate”)

**Academic Program:** enter appropriate program code for student or search using spyglass (optional)

**Academic Plan:** enter appropriate plan code for student or search using spyglass (optional)

**Academic Sub-Plan:** enter appropriate plan code for student or search using spyglass (optional)

**Selection Code:** leave as default (“Student”)

**Selection Date:** enter student’s Empl ID or search using spyglass

**Operation Code:** select “Course Directive” from drop-down – the screen will refresh after this selection

---

**NOTE:** Academic Program, Academic Plan, and Academic Sub-Plan are optional fields. Using these fields is dependant upon where the requirement you are trying to change is written. For instance, if the requirement you are trying to change is written at the program level, you should enter the code into the Academic Program field. Likewise, if the requirement you are trying to change is written at the plan level, you should enter the appropriate code Academic Plan field.
Step 4: Click the “Create Exception” link

Step 5: Enter the following values
- **Requirement Group**: enter appropriate Requirement Group number or search using spyglass
- **Requirement**: enter appropriate Requirement number or search using spyglass
- **Line Nbr**: enter appropriate Line number or search using spyglass

<table>
<thead>
<tr>
<th>Requirement Group</th>
<th>Requirement</th>
<th>Line Nbr</th>
</tr>
</thead>
<tbody>
<tr>
<td>002424</td>
<td>L&amp;S HISTORY MAJOR REQUIREMENTS</td>
<td></td>
</tr>
<tr>
<td>000002194</td>
<td>L&amp;S HISTORY REQUIREMENTS</td>
<td></td>
</tr>
<tr>
<td>0030</td>
<td>HISTORY- NON-WESTERN/GLOBAL</td>
<td></td>
</tr>
</tbody>
</table>

- **Course Sequence**: leave as default
- **Directive Type**: select appropriate from drop-down
  - Substitute = moving course into selected requirement
  - Exclude = moving course out of selected requirement
- **Course Source**: select appropriate from drop-down
  - Course Offerings = all courses available at UWM
  - Enrollment = all UWM courses on student’s enrollment record
  - Other Credit = all Other Credit listings from student’s record
  - Test Credit = all Test Credit listings from student’s record
  - Transfer Courses = all Transfer Courses from student’s record
- **Term**: leave blank
- **Directed Units**: leave blank
- **Min Grade Points/Unit**: leave blank
- **Directed Courses**: leave blank
- **Course Topic ID**: leave blank
**Step 6:** Click the **Search** button.

**Step 7:** Search for and select desired course by clicking ☑️ next to the course in the search list.

**NOTE:** There may be multiple lines listed for each course. This is because the course may have gone through numerous revisions over time. Since the Course ID is the same for each version, you can select any of the lines of the course for the student exception to function properly.

The selected course will auto-populate into the Directed Courses box.

**Step 8:** Click the **OK** button.
**Step 9:** Run a Degree Progress Report to make sure the course was directed properly in the Advisement report with appropriate “Course [directed to/excluded from] this line” text and operator name.

Here’s how the Course Directive will appear on the Advisement Report:

```
Course directed to this line

Fall 2005  HIST  600  Seminar in History  3.00  C  EN

[appropriate description]

Operator: Seth Zlotocha
```
REQUIREMENT CHANGE

OVERVIEW
The Requirement Change allows you to alter a requirement's parameters – e.g., reduce the number of required credits in a requirement from 10 to 8.

Navigation: Home > Academic Advisement > Student Advisement > Authorize Student Exceptions

Process:

Step 1: Click the “Add a New Value” tab or link

Step 2: Click the Add button
Step 3: Enter the following values

**Effective Date**: leave as default (current date) or back-date, if necessary

**Description**: enter an appropriate description for the exception

**Short Description**: enter an appropriate short description for the exception

**Long Description**: enter an appropriate long description for the exception

### Authorize Student Exceptions

- **Effective Date**: 08/25/2006
- **Status**: Active
- **Description**: Enter appropriate description
- **Short Description**: Notrop
- **Long Description**: Enter appropriate long description

### Academic Institution
- Leave as default (“UWMIL”)

### Academic Career
- Enter “UGRD” (for “Undergraduate”)

### Academic Program
- Enter appropriate program code for student or search using spyglass (optional)

### Academic Plan
- Enter appropriate plan code for student or search using spyglass (optional)

### Academic Sub-Plan
- Enter appropriate sub-plan code for student or search using spyglass (optional)

### Selection Code
- Leave as default (“Student”)

### Selection Date
- Enter student’s Empl ID or search using spyglass

### Operation Code
- Select “Requirement Change” from drop-down – the screen will automatically refresh after this selection and the Level row will be added

### Override Detail

- **Academic Institution**: UWMIL University of Wisconsin-Milwaukee
- **Academic Career**: UGRD Undergraduate
- **Academic Program**: LAUG Letters & Science Undergrad
- **Academic Plan**: HISTORY9A2 History
- **Academic Sub-Plan**: 
- **Selection Code**: Student
- **Selection Date**: 08/04/06
- **Operation Code**: Requirement Change

**Level**: enter appropriate or search using spyglass

- RG = Requirement Group
- RQ = Requirement
- LN = Line
NOTE: Academic Program, Academic Plan, and Academic Sub-Plan are optional fields. Using these fields is dependant upon where the requirement you are trying to change is written. For instance, if the requirement you are trying to change is written at the program level, you should enter the code into the Academic Program field. Likewise, if the requirement you are trying to change is written at the plan level, you should enter the appropriate code Academic Plan field.

NOTE: The Level is dependant upon where the requirement you are trying to change is written. For instance, if the requirement you are trying to change is written at the Line level, you should enter LN. Likewise, if the requirement you are trying to change is written at the requirement level, you should enter RQ.

Step 4: Click the “Create Exception” link

Step 5: Enter the following values
- **Requirement Group**: enter appropriate Requirement Group number or search using spyglass
- **Requirement**: enter appropriate Requirement number or search using spyglass (if applicable)
- **Line Nbr**: enter appropriate Line number or search using spyglass (if applicable)
Once the desired RG, RQ, or LN is selected, the default values will auto-populate in the New Values box.

### Requirement Line to Change

<table>
<thead>
<tr>
<th>Requirement Group:</th>
<th>002424</th>
<th>L&amp;S HISTORY MAJOR REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requirement:</td>
<td>000002194</td>
<td>L&amp;S HISTORY REQUIREMENTS</td>
</tr>
<tr>
<td>Line Nbr:</td>
<td>0030</td>
<td>HISTORY - NON-WESTERN/GLOBAL</td>
</tr>
</tbody>
</table>

### New Values

<table>
<thead>
<tr>
<th>Minimum Units:</th>
<th>9.00</th>
<th>Maximum Units Allowed:</th>
<th>9.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Courses:</td>
<td></td>
<td>Maximum Courses Allowed:</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** If nothing auto-populates in the New Values box, then there are no values for the selected RG, RQ, or LN. You should return to the previous screen by clicking the Cancel button in order to select a new Level for the exception.

**Step 6:** Change the values in the New Values box to the new values being allowed under the exception.

### New Values

<table>
<thead>
<tr>
<th>Minimum Units:</th>
<th>3.00</th>
<th>Maximum Units Allowed:</th>
<th>9.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Courses:</td>
<td></td>
<td>Maximum Courses Allowed:</td>
<td></td>
</tr>
</tbody>
</table>

**Step 7:** Click the **OK** button.

**Step 8:** Run a Degree Progress Report to make sure the requirement was changed properly in the Advisement report with appropriate “[Value changed] Required changed from” text and operator name.

Here’s how the Requirement Change will appear on the Degree Progress Report:

```
Minimum Units Required changed from 9.00 to 3.00

[appropriate description]

Operator: Seth Zlotocha
```
REQUIREMENT WAIVER

OVERVIEW
The Requirement Waiver allows you to exempt a student from a requirement. This exception should not be confused with simply waiving a specified number of credits from a requirement, which would require a Requirement Change.

Navigation: Home > Academic Advisement > Student Advisement > Authorize Student Exceptions

Process:
Step 1: Click the “Add a New Value” tab or link

 Autorize Student Exceptions
Enter any information you have and click Search. Leave fields blank for a list of all values.

 Find an Existing Value Add a New Value

Advisement Override:
Description:
Selection Code:
Selection Data:
Override Operation Code:
Academic Institution:
Academic Career:
Academic Program:
Academic Plan:
Academic Sub-Plan:

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value Add a New Value

Step 2: Click the Add button

Authorize Student Exceptions

Find an Existing Value Add a New Value

Advisement Override: }0000000000

Add

Find an Existing Value Add a New Value
Step 3: Enter the following values
- **Effective Date**: leave as default (current date) or back-date, if necessary
- **Description**: enter an appropriate description for the exception
- **Short Description**: enter an appropriate short description for the exception
- **Long Description**: enter an appropriate long description for the exception

### Authorize Student Exceptions

<table>
<thead>
<tr>
<th>Advisement Override</th>
<th>User ID: Sub Zolocha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date:</td>
<td>09/1/2006</td>
</tr>
<tr>
<td>Description:</td>
<td>[enter appropriate]</td>
</tr>
<tr>
<td>Long Description:</td>
<td>[enter appropriate long description]</td>
</tr>
</tbody>
</table>

**Academic Institution**: leave as default (“UWMIL”)
**Academic Career**: enter “UGRD” (for “Undergraduate”)
**Academic Program**: enter appropriate program code for student or search using spyglass (optional)
**Academic Plan**: enter appropriate plan code for student or search using spyglass (optional)
**Academic Sub-Plan**: enter appropriate plan code for student or search using spyglass (optional)
**Selection Code**: leave as default (“Student”)
**Selection Date**: enter student’s Empl ID or search using spyglass
**Operation Code**: select “Requirement Waiver” from drop-down – the screen will automatically refresh after this selection and the Level row will be added

### Override Detail

- **Academic Institution**: UWMIL, University of Wisconsin-Milwaukee
- **Academic Career**: UGRD, Undergraduate
- **Academic Program**: LAAU0, Letters & Science Undergrad
- **Academic Plan**: HISTORYBA2, History
- **Academic Sub-Plan**: 
- **Selection Code**: Student
- **Selection Data**: 00004664, Rita Paws
- **Operation Code**: Requirement Waiver
- **Level**: enter appropriate or search using spyglass
  - RG = Requirement Group
  - RQ = Requirement
  - LN = Line
NOTE: Academic Program, Academic Plan, and Academic Sub-Plan are optional fields. Using these fields is dependant upon where the requirement you are trying to waive is written. For instance, if the requirement you are trying to waive is written at the program level, you should enter the code into the Academic Program field. Likewise, if the requirement you are trying to waive is written at the plan level, you should enter the appropriate code Academic Plan field.

NOTE: The Level is dependant upon where the requirement you are trying to waive is written. For instance, if the requirement you are trying to waive is written at the Line level, you should enter LN. Likewise, if the requirement you are trying to waive is written at the requirement level, you should enter RQ.

Step 4: Click the “Create Exception” link

Step 5: Enter the following values
- **Requirement Group**: enter appropriate Requirement Group number or search using spyglass
- **Requirement**: enter appropriate Requirement number or search using spyglass (if applicable)
- **Line Nbr**: enter appropriate Line number or search using spyglass (if applicable)

Step 6: Click the **OK** button.

Step 7: Run a Degree Progress Report to make sure the requirement was waived properly in the Advisement report with appropriate “Exempted” text and operator name.

Here’s how the Requirement Waiver will appear on the Degree Progress Report:

```
Exempted -

[appropriate description]

Operator: Seth Zlotocha
```
ALTERING EXISTING EXCEPTION

Overview
Certain instances exist when it is necessary or useful to alter an existing exception rather than creating a new exception. Some examples include:

- When a student has moved from intended major status to declared major status (e.g., HISTORYBA1 to HISTORYBA2). If an exception is entered for requirements created under the intended major plan code, the exception must be altered for the requirements created under the declared plan code.
- When a Course Directive is entered for the incorrect course. PAWS will not allow a new Course Directive to be entered for the same requirement line if a Course Directive already exists for that requirement line. The existing Course Directive needs to be entered.

Altering exceptions in each of the two examples are demonstrated below.

Scenario 1: A Requirement Change to reduce the number of required American History credits was entered for a student when she was a History – Intended major (HISTORYBA1). The student is now a History – Declared major (HISTORYBA2), and the exception is no longer appearing on the advisement report.

Navigation: Home > Academic Advisement > Student Advisement > Authorize Student Exceptions

Step 1: Click on the “Find an Existing Value” tab.

Step 2: Enter the following values on the search page:
Advisement Override: leave blank
Description: leave blank
Selection Code: select “Student” from the drop-down
Selection Data: enter the student’s EMPLID
Override Operation Code: leave blank
Academic Institution: leave blank
Academic Career: leave blank
Academic Program: leave blank
Academic Plan: leave blank
Academic Sub-Plan: leave blank

Check the “Correct History” check box.
Step 3: Click the **Search** button.

Step 4: Select the exception from the list that needs to be altered.

Step 5: Change the “Academic Plan” in the Override Details section to the student’s new plan code.
Step 6: Click on the “Create Exceptions” link to alter the requirement that is being changed.

Step 7: Override the Requirement Group, Requirement, and Line Nbr values by using the look-up button to select the values associated with the new plan code.

Step 8: Alter the values in the New Values section to the desired level.

NOTE: These values will revert to the default settings for the requirement after the Requirement Group, Requirement, and Line Nbr fields are altered.
Step 9: Click the **OK** button to save the changes.

### Authorize Student Exceptions

<table>
<thead>
<tr>
<th>Requirement Line to Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requirement Group: 001424</td>
</tr>
<tr>
<td>Requirement: 000002194</td>
</tr>
<tr>
<td>Line No.: 0020</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Units: 3.00</td>
</tr>
<tr>
<td>Minimum Courses:</td>
</tr>
</tbody>
</table>

### Scenario 2:
A **Course Directive** was entered prior to the completion of a course. The student did not earn a passing grade in the directed course. The student subsequently re-enrolled in the course. The existing **Course Directive** needs to be altered to direct the re-enrolled course into the requirement.

### Navigation:
Home > Academic Advisement > Student Advisement > Authorize Student Exceptions

**Step 1:** Click on the **“Find an Existing Value”** tab.

### Step 2:
Enter the following values on the search page:
- **Advisement Override:** leave blank
- **Description:** leave blank
- **Selection Code:** select “Student” from the drop-down
- **Selection Data:** enter the student’s EMPLID
- **Override Operation Code:** leave blank
- **Academic Institution:** leave blank
- **Academic Career:** leave blank
- **Academic Program:** leave blank
- **Academic Plan:** leave blank
- **Academic Sub-Plan:** leave blank

Check the **“Correct History”** check box.
Step 3: Click the **Search** button.

Step 4: Select the exception from the list that needs to be altered.

Step 5: (if necessary) Change the Description fields to fit the re-enrolled course.

<table>
<thead>
<tr>
<th>Description</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Hist 132 as Euro Hist</td>
<td>Hist 132</td>
</tr>
<tr>
<td>Allow Hist 131 as Euro Hist</td>
<td>Hist 131</td>
</tr>
</tbody>
</table>
Step 6: Click on the “Create Exceptions” link.

Step 7: Select the appropriate Course Source for the re-enrolled course. If the student has already re-enrolled in the course, use “Enrollment.” If the student has not re-enrolled in the course, use “Course Offerings.” Click the Search button.
**Step 8:** Enter the Subject Heading for the re-enrolled course. Click the **Search** button.

**Student Course Directive Search**

**Academic Institution:** University of Wisconsin-Milwaukee  
**Subject Area:** HIST  
**Search:**

**Step 9:** Click the **button to select the appropriate course from the search list.

<table>
<thead>
<tr>
<th>Course Selection</th>
<th>Subject</th>
<th>Catalog Nbr.</th>
<th>Course Name</th>
<th>Class Nbr.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>HIST 121</td>
<td>World History to 1500</td>
<td>13043</td>
<td>43010</td>
</tr>
<tr>
<td></td>
<td>HIST 122</td>
<td>World History Since 1500</td>
<td>13044</td>
<td>43015</td>
</tr>
<tr>
<td></td>
<td>HIST 192</td>
<td>Freshman Seminar</td>
<td>13046</td>
<td>60031</td>
</tr>
</tbody>
</table>

**Step 10:** Click the **OK** button to save the changes.
COURSE SUBSTITUTION

OVERVIEW
The Course Substitution is a straight substitution of one course for another throughout the Degree Progress Report. You only use a Course Substitution when you want a course to take the place of another course in every requirement on the Degree Progress Report. Only select users have access to complete a Course Substitution; whenever possible, a Course Directive should be completed rather than a Course Substitution.

Navigation: Home > Academic Advisement > Student Advisement > Create Course Substitution

NOTES: Substitutions also can be set up in advance of course completion. For example, transfer work in the summer session can be pre-approved so it is automatically calculated in the fall session. If the student never takes the course, the substitution is not processed. The course substitution panel is keyed off a student's ID making each substitution student-specific.

Substitutions affect a student's career. Each career can contain course substitutions. A student with multiple careers can have multiple course substitutions that are relevant to the specific career.

Process:

Step 1: Enter a student’s identifying information (preferably an ID) on the search page.

If the student has multiple careers, select the career to which the substitution should apply.

Select appropriate

<table>
<thead>
<tr>
<th>ID</th>
<th>Academic Career</th>
<th>Program Short Desc</th>
<th>Institution Short Desc</th>
<th>National ID</th>
<th>Country</th>
<th>SSN</th>
<th>Date of Birth</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>0004934</td>
<td>UGRO</td>
<td>AHUG</td>
<td>UWM</td>
<td>USA</td>
<td>S5N</td>
<td>04/19</td>
<td>Fawaz, Rita Barbara</td>
<td></td>
</tr>
</tbody>
</table>
If this is the first substitution for the student, use the blank row that appears.

If the student has other substitutions, click the button to add an additional row.

**Step 2:** Enter the following values

- **Substitution Seq:** leave as default
- **Course Source:** select appropriate from drop-down
  - *Course Offerings* = All available courses in UWM catalog
  - *Enrollment* = All UWM courses student has enrolled in
  - *Other Credit, Test Credit, Transfer Credit* = Credits and courses earned by the student from other sources than course offerings and enrollment
- **Long Description:** enter appropriate description for substitution

**Step 3:** Click the button next to the **Select Course** text.
Step 4: Search for course to be substituted.

Step 5: Select desired course from list by clicking on button.

You will be automatically returned to the Course Substitution page.

Step 6: Click button next to the Substitute for text.

Step 7: Search for course to be substituted for.

Step 8: Select desired course from list by clicking on button (see screen shot above).

You will be automatically returned to the Course Substitution page.

Step 9: Click button.
**Step 10:** Run a Degree Progress Report to make sure the course substituted properly throughout the Degree Progress Report with appropriate “Use in place of” text.

Here’s how the substitution will appear on the Degree Progress Report:

<table>
<thead>
<tr>
<th>Term</th>
<th>Course</th>
<th>Description</th>
<th>Units</th>
<th>Grade Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2005</td>
<td>HIST</td>
<td>249</td>
<td>3.00</td>
<td>A-</td>
</tr>
<tr>
<td>Use in place of HIST 275</td>
<td>Intro Midd East/West Relig</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>