Degree Works Audit Exception Management Authorization Form

For an exception to be approved for a student's official degree audit, the following steps must be completed by the advisor, Dean/Chair, and the registrar's office. The registrar's office has the right to reject and delete exceptions after they have been entered by a Dean/Chair. Follow the steps in the "How to File a Degree Works Petition and Exception" document. Please contact the registrar's office with any questions/concerns on whether an exception will be allowed. Please contact the Degree Works Analyst with any questions about entering a petition or exception.

☐ Advisor created the petition in Degree Works

☐ Advisor sent this form to the student's Dean/Chair for approval

_____   _____

Advisor's Signature   Date

☐ Dean/Chair approved the petition in Degree Works

☐ Dean/Chair sent this for to the registrar's office

_____   _____

Dean/Chair's Signature   Date

☐ Registrar has received and approved the petition

☐ Registrar has received and rejects the petition

_____   _____

Registrar's Signature   Date

How to File a Petition in Degree Works

ADVISING STAFF

A petition can be a request to have a particular requirement modified or waived for a particular student. To create a petition, first select the student for whom you wish to enter a petition and then click the Petitions tab. This will bring up the petition screen shown below.

Portal	FAQ	Help	Print	Exception Management	Log Out

Find Student ID ⏮ ◀ Name ▶ ⏭ Degree Major | Level | Classification | Last Audit | Last Refresh
****456 | Gerrard, Stephen ▼ | B.A. ▼ | Banner Accounting | U | Freshman | Today | Today at 4:36 p.m. | ◯

Worksheets	Planner	Notes	Petitions	Exceptions	GPA Calc	Admin

View Petitions ❯

Add Petition

Modify Petitions

Delete Petitions

View Petitions for Exceptions

No Petitions Waiting Approval

Petitions Approved

Description	Created By	Create Date
Stephen would like to change the computer requirement to a math requirem ent (MATH 2220) instead.	Manager, DegreeWorks Middle Second	09/25/2008

Petitions Applied as Exceptions

Description	Created By	Create Date
Stephen spent a year in Berlin and should skip the foreign language requ irement.	Manager, DegreeWorks Middle Second	09/25/2008

Petitions Rejected

Description	Created By	Create Date
Stephen should be able to skip the introductory accounting course becaus e his father is an accountant.	Manager, DegreeWorks Middle Second	09/25/2008

The petition screen shows all petitions that have been entered on the student's behalf. The View Petitions screen is shown by default whenever the petition tab is selected. Petitions are grouped according to their status. Petitions can either be waiting for approval, approved, applied as exceptions or rejected. All new petitions have a default status of waiting for approval when first created.

To create a new petition, click the Add Petition button. This will bring up a text box where you can enter the text for the petition.

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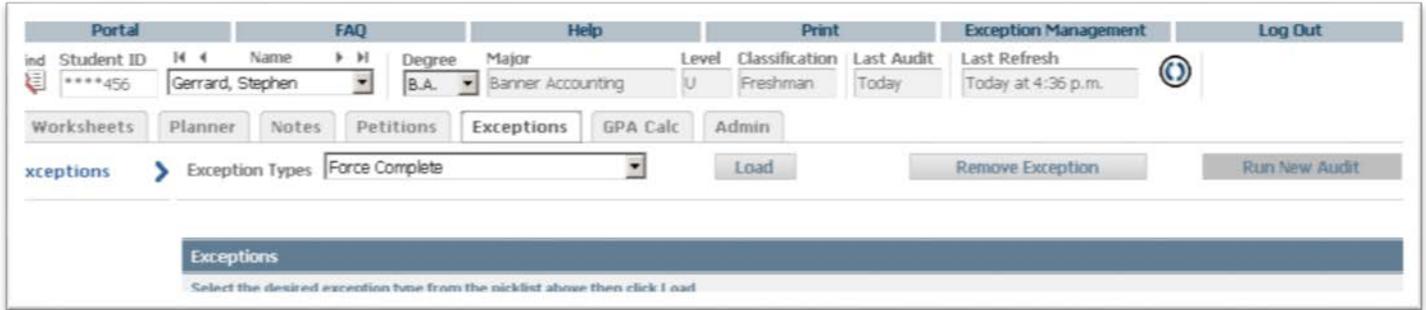
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Once you have entered the text for the petition, click the Submit Petition button to save the petition to the database. A message will appear telling you your petition was added successfully. To add another petition, click the Add Petition button again and repeat the process.

To modify a petition, click the Modify Petition button. Only petitions with a status of Waiting Approval may be modified. A text window will open up for those petitions created by you. You will not be able to modify petitions created by others. To modify a petition, click in the text window and add or delete text. Click the Save button to the left of the petition to save your changes.

To delete a petition, click the Delete Petition button. Only petitions created by you can be deleted. Click the Delete button to the left of the petition to remove it from the database. Petitions that have been approved, applied as exceptions or rejected cannot be deleted. Only the registrar's office can delete petitions once they have been acted upon.
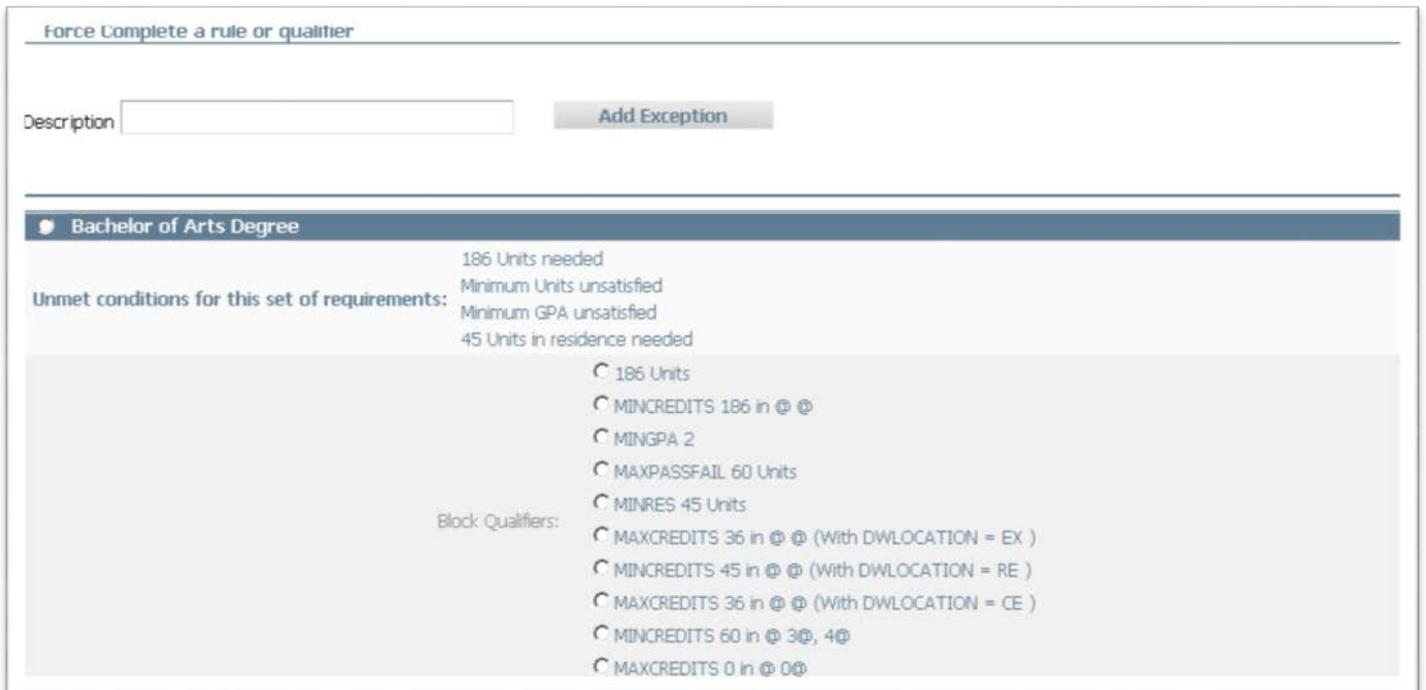
DEPARTMENT DEAN/CHAIR

The Exceptions function allows those users having access to this function to modify the requirements for degree completion for a specific student. To access the Exceptions function, first find the student you will be performing the exception for and then click the Exceptions tab. This will open up the Exceptions screen shown below.

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The Exceptions screen contains two parts. The upper part of the screen contains a drop-down list of the types of exceptions available to the user. Click the down arrow to open up the drop-down list and select the appropriate exception type.
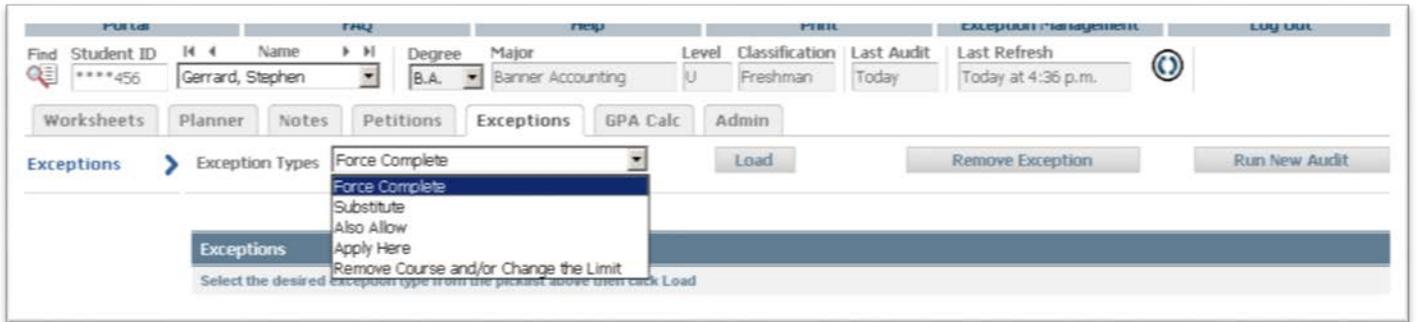
Click the Load button to load the chosen exception type. A middle screen will appear with additional fields specific to the exception type chosen. The bottom part of the Exceptions screen shows an audit for the student showing all exceptions that have been entered and/or applied to the student audit.

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Degree Works allows you to process the following types of exceptions:

Force Complete - This exception completes a course rule, subset rule, block qualifier or rule qualifier without applying additional classes. It is the most powerful exception type available

Substitute - This exception allows you to substitute one course for another

Also Allow - This exception appends a course to a course list on a rule

Apply Here - This exception allows the user to apply a specific course to a rule regardless of the Scribe text or the auditor best- fit algorithm. The auditor will not move courses applied to rules with this exception type unless a block or rule qualifier overrides the exception.

Remove Course / Change the Limit - This exception allows you to remove a class from a course rule or qualifier or to change the number of classes or credits required on a rule or qualifier. Some exception types require more information than others. The bottom half of the screen shows an audit report for the student. The audit shows where each course has been applied and what remaining requirements are left outstanding. The radio buttons are used for selecting the rule on which to add the selected exception.

To Add a new exception, select the exception type you wish to add by selecting it from the Exception Type drop-down list.

Select the course rule or qualifier where you wish to add the exception by clicking the correct radio button. Fill in the information required for each exception type. Each exception type will be discussed in greater detail below. Once the correct information has been entered, enter a description of the exception being added and click the Add Exception button to save the exception. If you do not enter a description, you will be prompted with a message that one will be entered for you describing the exception type you are using.

Exceptions are both student-specific and block-specific. In other words, an exception applies to a specific block used in a student degree audit. If an exception is processed in a major block for a student and that student then changes his/her major, the previous exception will no longer apply to the student's new major. Unused exceptions will appear at the bottom of the audit report in the Audit Errors section. Exceptions are also used with What-If audits. Exceptions will only appear in the exception screen and on audit reports configured to show Exceptions. By default, the Registrar's Audit report is configured to show exceptions. The text description entered with the exception will appear next to the exception on the audit report along with a time stamp indicating the name and date of the person who entered the exception.

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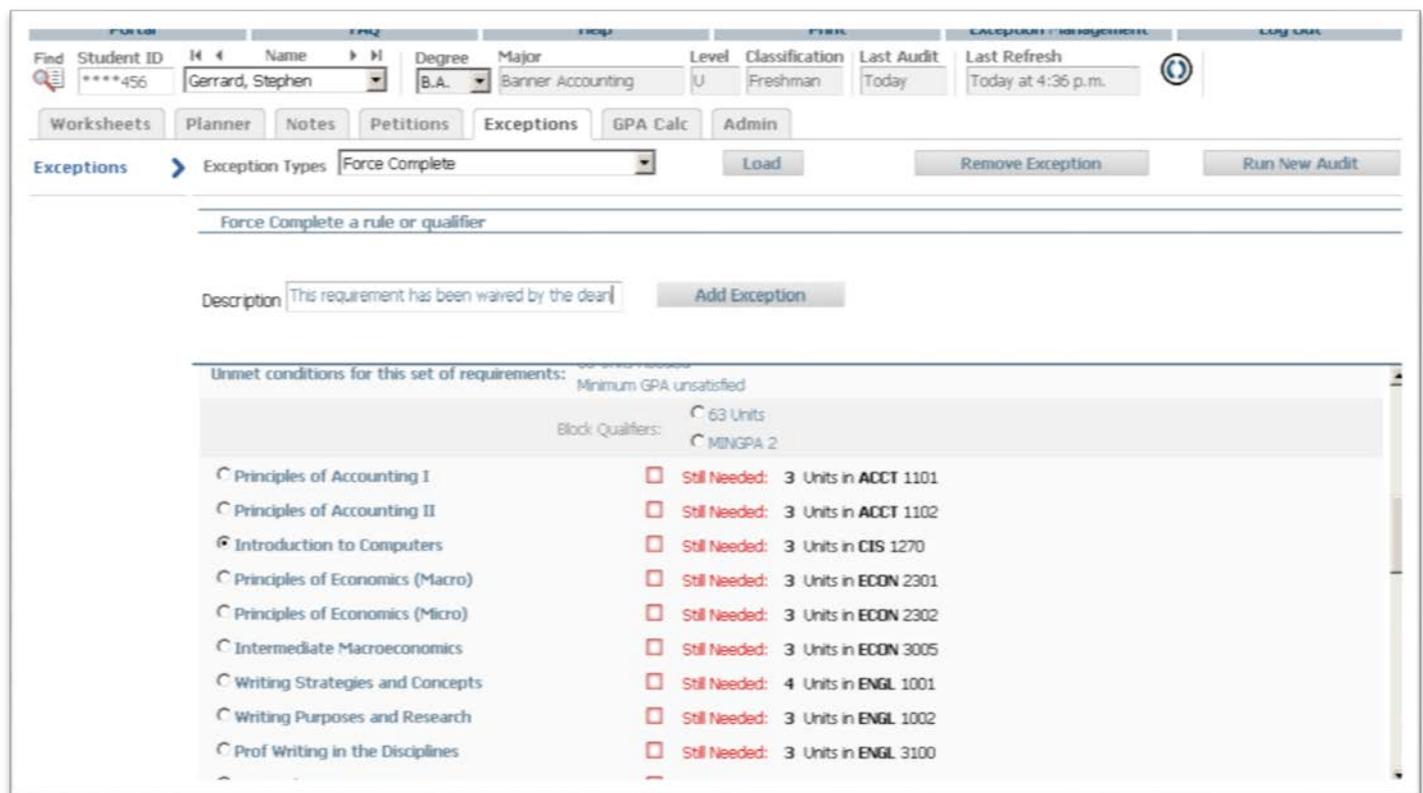
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Types of Exceptions

Force Complete

To process a Force complete exception, select Force Complete from the Exception Types dropdown list and click the Load button.

Select the course rule or qualifier by clicking the radio button next to it in the degree audit.

Enter a description of why this exception is being processed and then click the Add Exception button located in the middle of the screen.

A text box will appear indicating that the exception was successfully saved to the database. If there was an error while trying to process an exception, an error message box will appear indicating the type of error encountered.

Shown below is an example of a Force Complete exception processed for the Philosophical Foundations of Sport & PE requirement.

The Force complete exception can be used on any course rule and most qualifiers. This exception type is completely independent of all student data. It will simply complete a rule on a student degree audit regardless of any qualifiers that might apply. Forcing a qualifier complete tells the auditor to ignore the qualifier the next time and audit is performed for this student.

Substitute

The Substitute exception is used to substitute one course for another. This is distinct from the Also Allow exception type in that one course is exchanged for another. To process a substitute exception, select the Substitute entry from the Exception Type drop-down list and click the Load button.

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Select the rule or qualifier where you would like the exception to apply. Enter the target course from the course rule in the Replace fields. The target course must be found on the rule where the exception is to be placed in order to be saved to the database. Enter the substituted course in the With fields. The substituted course may also be selected by clicking on a course in the Electives area. This will automatically add the course to the With field.

You can further define the Also Allow exception using With qualifiers from the drop-down list. The values listed in the drop-down list are system defined With qualifiers. When With qualifiers are included as a condition for this exception type, only those courses meeting the WITH qualifier criteria will be evaluated for the exception.

Enter a brief description of why the exception is being processed and click the Add Exception button.

The substitute exception requires that one course be used in place of another. If the rule contains only a single course, then the substituted course is required for completion of the block. If a substitute exception is processed on a rule with more than one course option that can be used to complete the rule, then the substituted course is not required and is an option available to the student. Only qualifiers that list courses support this type of exception.
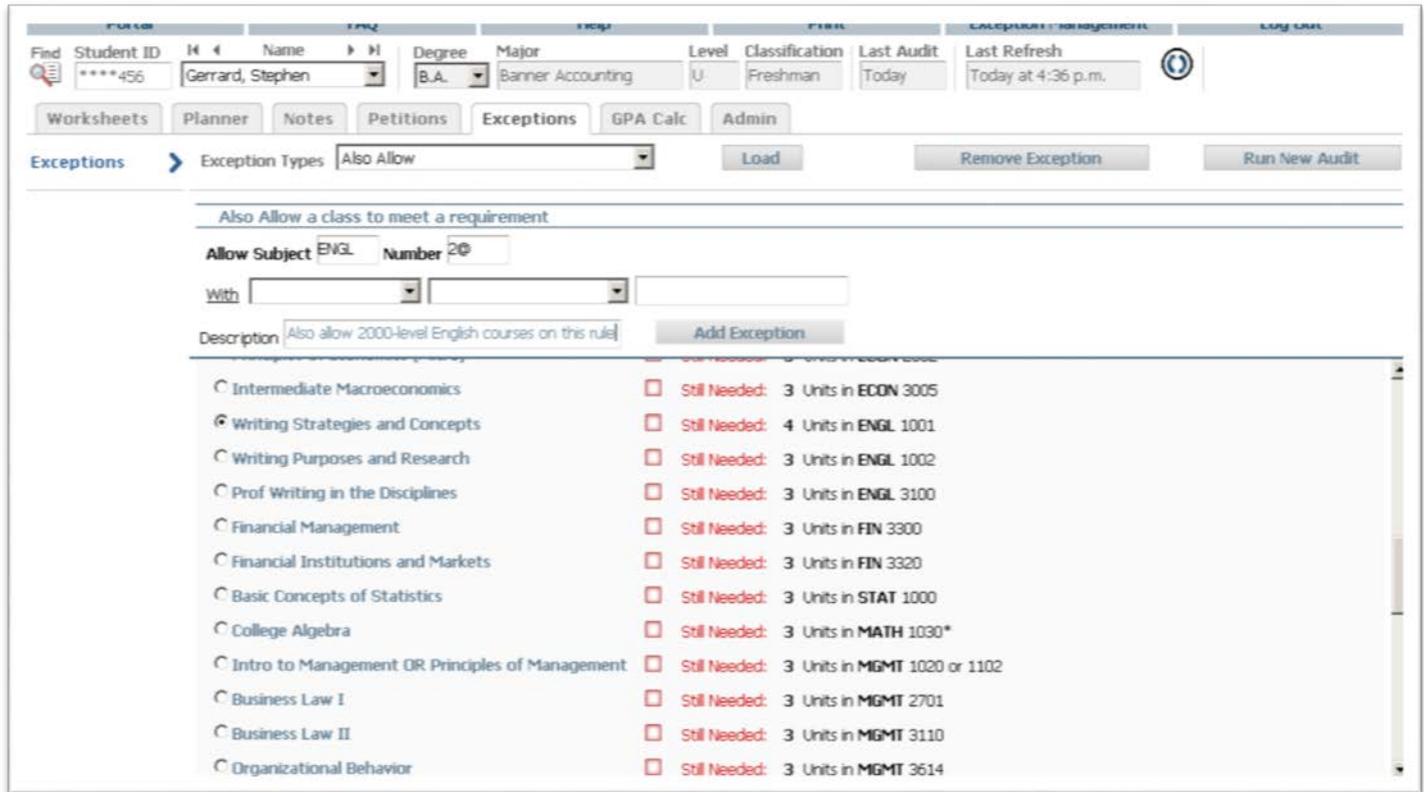
Also Allow

The Also Allow exception modifies a course rule by appending a course to the course rule. This exception can be used when you wish to expand the course options available on a specific rule. Courses applied using the Also Allow exception are still subject to header qualifiers in the blocks in which they are used and are still subject to the best-fit algorithm. For example, if an Also Allow exception is processed allowing ENGL 215 to be used to satisfy a course rule and there is a block header or rule qualifier preventing the use of ENGL 215 within that block, the exception will be added to the database, but ENGL 215 will not be allowed to be used within that block.

When processing an Also Allow exception to a group rule, the exception can only be processed on the individual rule labels inside the group rule, not the GROUP RULE HEADER LABEL.

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To process an Also Allow exception, select the Also Allow entry from the Exception Type dropdown list. Select the course rule where you want the exception to apply. Enter the discipline and course number in the appropriate fields on the Also Allow exception and enter a brief description of why this exception is being processed. The course may also be selected by clicking on a course in the Electives area. This will automatically add the course to the course field for the exception type selected. Click the Add Exception button to complete the exception.

You may further define the Also Allow exception using With qualifiers from the drop-down list. The values listed in the drop-down list are system defined With qualifiers. When With qualifiers are included as a condition for this exception type, only those courses meeting the WITH qualifier criteria will be evaluated for the exception.

The Also Allow exception does not require that the selected course be used on the modified rule.

The best-fit algorithm of the Audit Processor Engine will still function with this type of exception. Consequently, the allowed course may not be applied to rule bearing the exception if there is a better fit for this course elsewhere in the degree audit.

Note that one exception has already been processed for this student in the previous screen shot. This exception shows up as white band with blue text across the Exceptions page. In addition to the description, the name of the person who processed the exception and the date the exception was processed is also shown. If an exception has been processed but not used in the degree audit, it will show up in the Audit Errors section at the bottom of the screen labeled as Exceptions Not Used.

Block header exceptions do not support the Also Allow exception.

Apply Here

The *Apply Here* exception allows the user to apply a course to a rule even if the course is not listed as an option. This exception is very useful in correcting audits in cases where the user wishes to dictate specifically where courses are to be used within the degree audit. The *Apply Here* exception will apply a course to a rule regardless of any scribing, rule or block header qualifiers. For example, suppose a block contains a 'MAXPASSFAIL 0 CLASSES' header qualifier. You can use the *Apply Here* exception to apply a PASSFAIL class to a rule in this block without having to modify the block header qualifier. The *Apply Here* exception will also override an EXCEPT list on a rule. Courses applied to rules using this exception type will not be moved around within the audit. When processing

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an *Apply Here* exception on a group rule, the exception can only be processed on the individual rule labels inside the group rule. *Apply Here* exceptions cannot be processed on a Group Rule Header.

To process an *Apply Here* exception, select the *Apply Here* exception from the Exception Type drop-down list. Enter the course you want applied to a rule. The course selected must be a course already taken by the student and found on the degree audit or one the student is planning to take. The *Apply Here* exception cannot be used for courses that have not yet been taken. Once you have entered the course you want applied, select the rule to which the course should be applied. A message box will appear telling you the exception has been saved to the database.

You may further define the *Apply Here* exception using WITH qualifiers from the drop-down list. The values listed in the drop-down list are system defined WITH qualifier. When With qualifiers are included as a condition for this exception type, only those courses meeting the WITH qualifier criteria will be evaluated for the exception.

When placing an *Apply Here* exception any existing WITH data is removed so that a course that normally did not meet the WITH qualifiers will be able to fit on the rule. If the *Apply Here* exception contains a new WITH qualifier that will be applied – replacing the previous WITH data.

To view the exception you placed on the student's record, click the Audit Tab, select the Detailed or Registrar's audit and process a new audit for this student. The exception will show up in blue text directly below the rule on which it was placed. If the exceptions are not showing up, be sure you have selected an audit report type that shows exceptions. Exceptions may not be viewable on all report types. Block header exceptions do not support the *Apply Here* exception.

Remove Course
The Remove Course Exception allows the user to remove a course from a course rule or qualifier or to change the limit on a course rule or qualifier. This exception type is very useful in modifying audit reports when students successfully petition to have a specific course or part of a specific requirement waived. This exception type is also useful in correcting the advice given to students when a specific course is disallowed on a specific rule by a student. For example, if a student receives advice that they can take CSC 113 to

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fulfill the Technology Requirement but the course has been disallowed on this rule for a specific student, you can correct the advice given to the student by using the Remove Course exception.

To process a Remove Course exception, select the Remove Course and/or Change Limit entry from the Exception Type drop-down list. Select the rule or qualifier containing the course you want to remove. Enter the course discipline and number you wish to remove. Enter a brief description for the exception. If the exception also involves changing the limits on the rule or qualifier for the student, enter the new limit in the Change Limit to field on the exception. Click the Add Exception button to save the exception.

Exceptions Details
Other than the 50-character description, users can enter a longer textual explanation about the exception. Users may want to describe why the exception is being added or who approved it.

Once the "Enter details" graphic is clicked, the user is presented with a window allowing longer text, up to 220 characters, to be entered.

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On worksheets the details will appear as a pop-up hint over the description. The details will not, however, display when students are viewing the worksheets; the text will only appear to nonstudent users.

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