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Table of Contents

Academic Advising

Academic Advisement enables you to set up and track the requirements and rules that a student must satisfy to complete a degree or other objective.

The core function of **Academic Advisement** is the ability to generate a degree audit report. A degree audit report is the evaluation of a student's coursework and grades against the requirements and course lists for the specific program to determine what, if any, requirements still must be met. It provides the analysis of requirements, requirement groups, course lists, restrictions, conditions, and an individual's coursework and grades, known as an **Advisement Report**.

Upon completion of this module, you will be able to:
• Add/Edit Student Exceptions
• Delete exceptions or make them inactive.

Student Exceptions
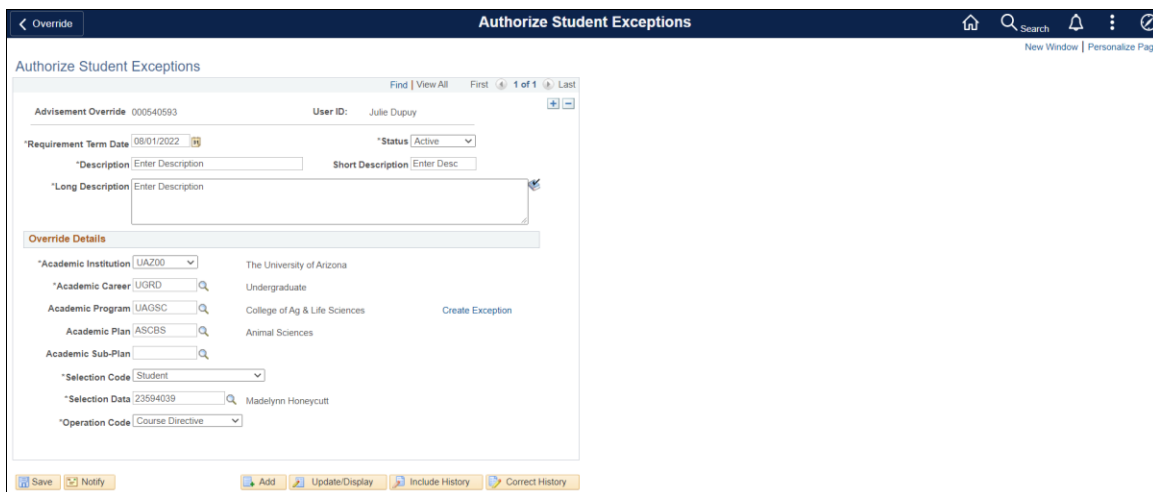
Use the Authorize Student Exceptions page to create advisement overrides. These overrides are used to create exceptions in the degree audit for a student. The different types of student exceptions are:

- A **Course Directive** authorizes a specific course to satisfy an academic requirement for a particular student. A Course Directive allows you to substitute and/or exclude a course(s) from a given requirement for a student.
- A **Requirement Change** indicates a change to unit and course maximums applicable to a specific academic requirement for a particular student.
- A **Requirement Override** is inactive and will not function.
- A **Requirement Waiver** forgoes the use of a specific existing academic requirement for a particular student. **Normally, a requirement change or requirement changes are required each time a Requirement Waiver is used.**

Authorize Student Exceptions

Procedure

Navigation: Academic Advisement → Student Advisement → Authorize Student Exceptions → Add a New Value

Step	Action
1.	Enter the appropriate date for the student's requirement term into the **Effective Date** field. **Effective Date** must be entered as the following • If the student's requirement term is **Fall** use: ○ **08/01/XXXX** (the year is the student's catalog year) (e.g. 2074 catalog year = 08/01/2007 Effective Date) • If the student's requirement term is **Spring** use: ○ **01/01/XXXX** (the year is the student's catalog year) (e.g. 2061 catalog year = 01/01/2006 Effective Date) • If the student's requirement term is **Summer** use: ○ **05/01/XXXX** (the year is the student's catalog year) (e.g. 2062 catalog year = 05/01/2006 Effective Date)
2.	Enter today's date and a general description of the exception you are making into the **Description** field: 07/29/2022 Major Core Sub
3.	Enter today's date, a general description, and any rationale for the exception into the **Long Description** field: 07/29/2022 Major Core Sub substitution approved by Dr. Smith. For an Animal Science major, (include the Subject, Title, or Theme of the area).
4.	Enter in desired **Academic Career** (UGRD) or search for desired Academic Career.
5.	Enter in desired **Academic Plan** or search for desired Academic Plan. Plan is only entered for exceptions to the major or minor. * **Academic Program** will only be populated for students from the 2104 requirement term forward. This will be populated automatically when you enter the Academic Plan.
6.	Enter the student's ID into the **Selection Data** field.

Step	Action
7.	Select your desired **Operation Code**: Course Directive, Requirement Change or Requirement Waiver. • **Course Directive:** authorizes a specific course to satisfy an academic requirement for a particular student. A Course Directive allows you to substitute and/or exclude a course(s) from a given requirement for a student. • **Requirement Change:** indicates a change to unit and course maximums applicable to a specific academic requirement for a particular student. Select your desired **Level**: Requirement Group Level, Requirement Level or Requirement Line Level. **Requirement Group (RG)**: This level represents a grouping of requirements. **Requirement (R)**: This level represents a specific Requirement section within a Requirement Group. **Requirement Line Level (L)**: This level represents a specific Line Item within a specific Requirement. • **Requirement Waiver:** forgoes the use of a specific existing academic requirement for a particular student. Select your desired **Level**: Requirement Group Level, Requirement Level or Requirement Line Level. **Requirement Group (RG)**: This level represents a grouping of requirements. **Requirement (R)**: This level represents a specific Requirement section within a Requirement Group. **Requirement Line Level (L)**: This level represents a specific Line Item within a specific Requirement.
8.	Click the **Create Exception** link. Create Exception

Creating Exceptions via Course Directive

Course Source: Transfer Credit

Procedure

Step	Action
1.	Run an Advisement Report to find the correct Requirement Group, Requirement and Line to direct the new course to.
	Click the **Look up Requirement Group (Alt+5)** button.
	Click the desired **Requirement Group** or type in appropriate Requirement Group.
2.	Click the **Look up Requirement (Alt+5)** button.
	Click the desired **Requirement** or type in appropriate Requirement.
3.	Click the **Look up Line Nbr (Alt+5)** button.
	Click the desired **Requirement Line** or type in appropriate Requirement Line.
4.	Select your **Directive Type:** Substitute or Exclude.
	You will select **Substitute** as your Directive Type if you would like to add a course to a student's Academic Requirements.
	You will select **Exclude** as your Directive Type if you would like to remove a course from a student's Academic Requirements.
	You will do both if you would like to replace one course with a different course.

Step	Action
5.	Select your **Course Source:** Course Offerings, Enrollment, Test Credit or Transfer Courses.
	Select **Course Offerings** for courses that the student has not yet taken.
	Select **Enrollment** for courses that the student has completed or is enrolled in.
	Select **Test Credit** for courses the student has completed via a test
	Select **Transfer Courses** for courses the student completed at another institution
6.	Click the **Search** button.
	Search

Step	Action
7.	Enter desired Subject or search for all transfer coursework.
	Click the **Search** button.
	Search

In this case the **Course Source** chosen is **Transfer Credit**, as we want to substitute a Transfer Course towards a requirement. The above Transfer Courses are noted as ELCR so they are not distinguishable by subject and catalog number. Note that each course has a **Model Nbr**, **Group** and **Seq#**. To determine which course you would like to select, you will look up the courses in the Transfer Credit: Report. The process is the same for a **Test Credit**.
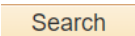
To look up these Transfer Courses, complete the following steps:

Looking up a Student's Transfer Course

Open a new UAccess window by clicking on the New Window hyperlink on the upper right-hand corner of your screen.

Navigation: Campus Community → Student Services Center

Step	Action
1.	Enter the Student ID in the ID field.
2.	Click the **Search** button. Search

Step	Action
3.	In Student Service Center, choose Transfer Credit: Report from dropdown menu.
4.	Click the radio go button to bring up report.

Student Services Center

Jason Weir ID 23388902

Until the Model Status reads Posted all Transfer Credit is subject to change.

Course Credits

Model Nbr 1 Posted
Institution The University of Arizona   Credit Source Type   External
Career Undergraduate   Source Institution   Pima Community College
Program College of Soc & Behav Sci

Group	Seq	Term	Year	Incoming Course	Description	Units Taken	Grade Input	Equivalent Course	Units Transferred	Grade	Status	Repeat Code	Requirement Designation
1	1	FALL	2015	SPA 202	Intermediate Spanish II	4.00	TB	SPAN 202	4.000	TB	Posted		
2	1	FALL	2015	SPA 201	Intermediate Spanish I	4.00	TA	SPAN 201	4.000	TA	Posted		
3	1	SPR	2015	SPA 102	Elementary Spanish II	4.00	TA	SPAN 102	4.000	TA	Posted		
4	1	FALL	2014	SPA 101	Elementary Spanish I	4.00	TA	SPAN 101	4.000	TA	Posted		
5	1	FALL	2015	JRN 102	Survey of Media Communication	3.00	TA	ELCR 1TR	3.000	TA	Posted		GEIS
6	1	FALL	2015	JRN 101	Intro to Reporting & Media Wr	3.00	TA	JOUR 205	3.000	TA	Posted		
8	1	FALL	2014	WRT 126	Short Story Writing	3.00	TA	ENGL 210	3.000	TA	Posted		
9	1	SPR	2015	WRT 154	Career Communications	3.00	TA	ENGL 1TR	3.000	TA	Posted		
10	1	SPR	2015	WRT 102	Writing II	3.00	TA	ENGL 102	3.000	TA	Posted		
11	1	FALL	2014	BIO 127IN	Human Nutrition & Biology	4.00	TA	NSC 170C1	4.000	TA	Posted		
12	1	FALL	2014	BIO 160IN	Intro to Human Anat & Phys	4.00	TA	ELCR 1TR	4.000	TA	Posted		GENS
13	1	SPR	2017	GENED AGEC A	Agec A		TCR	TRAN AGECA	0.000	TCR	Posted		
14	1	SPR	2015	CAD 101	Computer Aided Drafting I	4.00	TA		0.000		Rejected		
15	1	SPR	2016	JRN 185	Newspaper Publishing	3.00	TA	JOUR 1TR	3.000	TA	Posted		
16	1	FALL	2016	WRT 206	Short Story Writing	3.00	TB	ENGL 210	0.000	TB	Posted	ERAB	
17	1	FALL	2016	HIS 141	History of United States I	3.00	TA	HIST 160C1	3.000	TA	Posted		

Student Services Center

Model Nbr 2 Posted
Institution The University of Arizona   Credit Source Type   External
Career Undergraduate   Source Institution   College of Southern Nevada
Program College of Soc & Behav Sci

Group	Seq	Term	Year	Incoming Course	Description	Units Taken	Grade Input	Equivalent Course	Units Transferred	Grade	Status	Repeat Code	Requirement Designation
1	1	SPR	1991	ENG 101	Composition I	3.00	TA	ENGL 101	3.000	TA	Posted		
2	1	SPR	1992	SOC 101	PRIN OF SOCIOLOGY	3.00	TB	SOC 1TR	3.000	TB	Posted		
3	1	FALL	1991	PSY 101	GENERAL PSYCHOLOGY	3.00	TC	PSY 1TR	3.000	TC	Posted		
4	1	SPR	1991	PSC 101	INTRO AMERICAN POLITICS	4.00	TA	POL 1TR	4.000	TA	Posted		
5	1	FALL	1991	ACC 151	ELEM ACCOUNTING I	3.00	TA	ACCT 1TR	3.000	TA	Posted		
6	1	SPR	1992	ACC 152	ELEM ACCOUNTING II	3.00	TC	ACCT 1TR	3.000	TC	Posted		
7	1	FALL	1991	CIT 115	INTRO TO PROGRAMMING	3.00	TA	ELCR 1TR	3.000	TA	Posted		
8	1	FALL	1991	MATH 110	COLLEGE ALGEBRA	3.00	TA	MATH 1TR	3.000	TA	Posted		M112
9	1	SPR	1992	ENG 102	Composition II		TW		0.000		Rejected		
10	1	SPR	1992	ENG 243	INTRO TO SHORT STORY	3.00	TB	ENGL 1TR	3.000	TB	Posted		
11	1	SPR	1993	ACC 202	MICROCOMPUTER ACCTNG SYS		TW		0.000		Rejected		
12	1	SPR	1993	BUS 101	INTRO TO BUSINESS		TW		0.000		Rejected		
13	1	SPR	1993	ECON 101	PRINC-MACROECONOMICS		TW		0.000		Rejected		
14	1	SPR	1993	ENG 102	Composition II		TW		0.000		Rejected		
15	1	SPR	1993	MKT 130	INTRO TO MARKETING		TW		0.000		Rejected		
16	1	SPR	1993	SOC 102	CONTEMPORARY SOCIAL ISS		TW		0.000		Rejected		
17	1	SPR	1994	ECON 101	PRINC-MACROECONOMICS	3.00	TB+	ECON 1TR	3.000	TB+	Posted		
18	1	SPR	1994	ENG 102	Composition II		TW		0.000		Rejected		

Step	Action
5.	This student has Transfer Credit from two schools. Review the transfer courses to find the ELCR 1TR course you would like to substitute. Note the **Model**, **Group,** and **Sequence** number.
6.	Let's select ELCR 1TR: Model 2, Group 7, Sequence 1.

Now that you have identified the Transfer Course you wish to substitute, go back to your Authorize Student Exceptions window. |

Authorize Student Exception Window

Step	Action
7.	Click the **Add Class** button for **Model 2, Group 7, Seq. 1** to substitute this Transfer Course.

Step	Action
8.	Click the **OK** button once you are finished.
	If you would like to add another substitution or exclusion for this student's requirement, Click the **Add a new row at row 1 (Alt+7)** button.
	Repeat necessary steps.

Step	Action
9.	Click the **Save** button. ![Save]
10.	Run Advisement Report to verify exception is correct. **End of Procedure.**

_____

***For **Course Directive** if you would like to replace one course for another you need to Substitute the course you want to add, add a new row and Exclude the course that you want to replace with the substituted course.*

In this example, this is one exception made to one requirement line. The ELCR course is used to replace the ALC 422 course required for the line.

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Creating Exceptions via Requirement Change
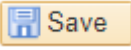
Procedure

Step	Action
1.	Run an Advisement Report to find the correct Requirement Group, Requirement and Line to make the change to. Complete Steps 1-7 of Authorize Student Exceptions and select Requirement Change as the Operation Code, and LN as the Level. Click the **Look up Requirement Group (Alt+5)** button or type in the appropriate Requirement Group. Click the desired **Requirement Group.**
2.	Click the **Look up Requirement (Alt+5)** button or type in the appropriate Requirement. Click the desired **Requirement.**
3.	Click the **Look up Line Nbr (Alt+5)** button or type in the appropriate Requirement Line. Click the desired **Requirement Line.**
4.	Change the **New Values** that you would like to update.
5.	Click the **OK** button.

Step	Action
6.	Click the **Save** button. ![Save]
7.	Run Advisement Report to verify exception is correct. **End of Procedure.**
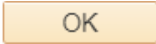
Creating Exceptions via Requirement Waiver
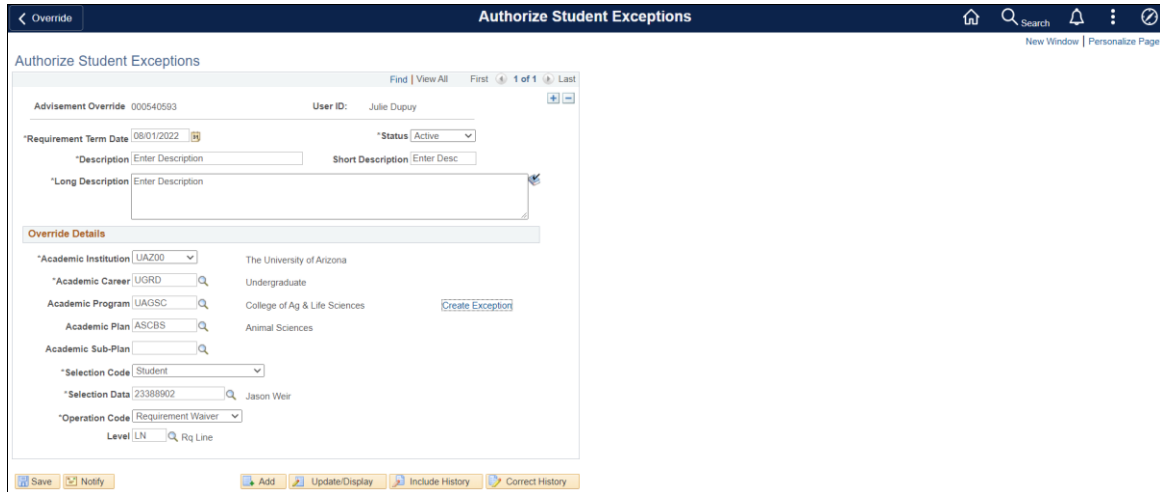
Procedure

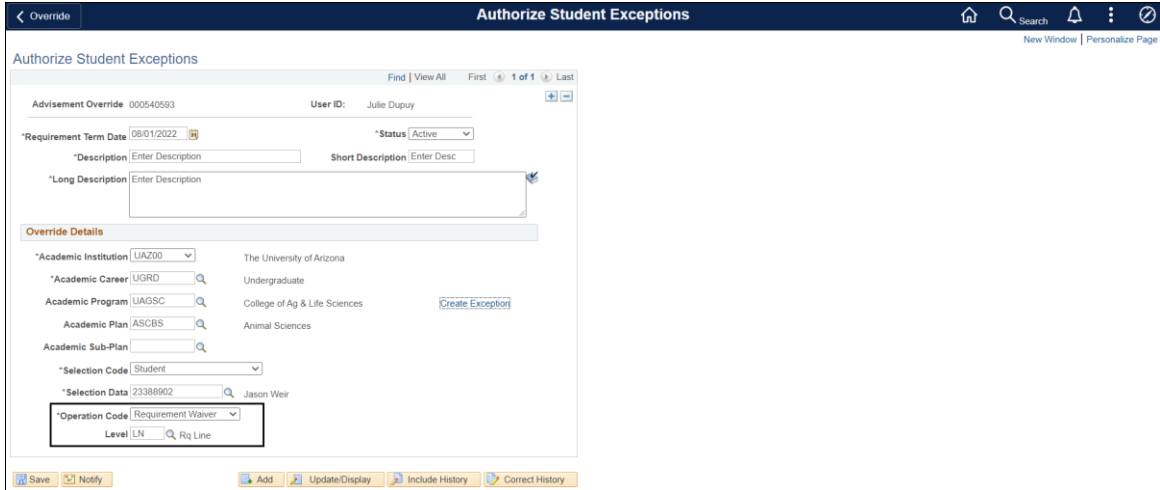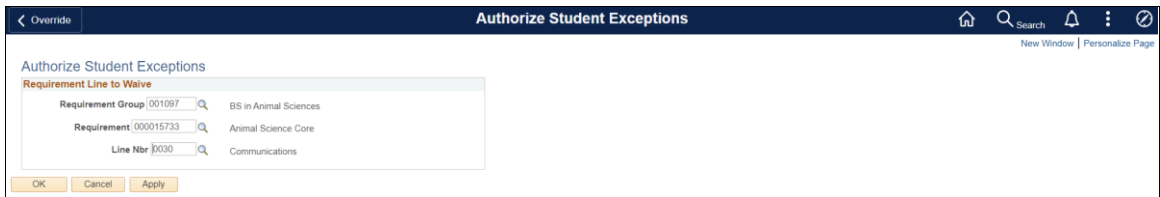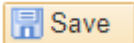| Step	Action
1.	Run an Advisement Report to find the correct Requirement Group, Requirement and Line to waive. Complete Steps 1-7 of Authorize Student Exceptions and select Requirement Change as the Operation Code. Click the **Look up Requirement Group (Alt+5)** button or type in the appropriate Requirement Group. 🔍 Click the desired **Requirement Group.**
2.	Click the **Look up Requirement (Alt+5)** button or type in the appropriate Requirement. 🔍 Click the desired **Requirement.**
3.	Click the **Look up Line Nbr (Alt+5)** button or type in the appropriate Requirement Line. 🔍 Click the desired **Requirement Line.**

Step	Action
4.	Click the **OK** button. OK

Step	Action
5.	Click the **Save** button. Save
6.	Run Advisement Report to verify exception is correct. **End of Procedure.**

Important Note:

   **When making exceptions to students' degree audits, as soon as you click the "Create Exception" link, for all types of exceptions, the exception number is saved in the system. This means that if you don't finish creating the exception, it will be in the system with an assigned number, but the exception will be blank. If you identify a blank exception, which is an exception that has no information in the "Create Exception" page please finish the exception if it is needed or delete the exception.*

Using the Online Advisement Report to Enter Course Directive Exceptions

Creating course directive exceptions from the online advisement report saves time and eliminates the need to gather disparate pieces of information: requirement term, career, program, plan, and student ID information on the first page of the exception; and requirement group, requirement, and line numbers on the second page of the exception.

Navigation: Academic Advisement > Student Advisement > Request Advisement Report

Step	Action
1.	Generate an ADVIP advisement report for the student you need to enter exceptions for.
2.	Scroll to the area of the advisement report you want to make an exception to.

Science and Pre-Professional Option Requirements (R2410)

Not Satisfied: Science and Pre-Professional Option Requirements

▼ **1. Core Courses (R2410/L10)**

Not Satisfied: Complete 7 units. Choose one course between MCB 410 or MCB 305.

- Units: 7.00 required, 1.00 taken, 6.00 needed

The following courses may be used to satisfy this requirement:

Personalize | View All | 🔲 First ◄ 1-4 of 4 ► Last

Course	Description	Units	When	Grade	RptCd	RqDes	Notes	Status	Pair
ACBS 102L	Intro to Animal Sci Lab	1.00	Fall 2020	A				✅	Pair
ACBS 445	Nutrition Physio+Metabol	3.00	Fall						Pair
MCB 305	CellDevelopment Biology	4.00 - 5.00	Fall						Pair
MCB 410	Cell Biology *** view multiple offerings	3.00 - 4.00							Pair

Substitute/Exclude

3.	Notice that next to each course is a "Pair" link and below the course list is a "Substitute/Exclude" link.
	- **Pair:** Clicking the Pair link will create a course directive exception that excludes the course associated with the link you clicked. The exception will also generate a line for you to choose which course you want to direct to the line.
	- **Substitute/Exclude:** Clicking Substitute/Exclude will create a course directive exception that allows you to substitute or exclude a course. No course is paired with the exception automatically if you choose this option.

Step	Action
5.	Notice that the Requirement Term Date, Career, and Selection Data fields are automatically filled out for you. The **Description** and **Long Description** fields are both required. None of the items under "Override Details" need to be input. If a major is chosen that information will also populate for you (please see upcoming example). Note: The description does not appear on the advising report; however, if searching for an exception via description this is the field it will search, and this is also the description that appears in the search results. The Long Description does appear on the online advising report, so use it to include pertinent data regarding your exception. Examples include the date you enter the exception, name of transfer course, reason for exception, etc.
6.	Once you have input your Description and Long Description click **Create Exception**.

Step	Action
7.	Notice that the requirement group, requirement, and line numbers have auto-filled for you. Further, the class that was selected to pair is already set to exclude. Now you just need to select your **Course Source** for the Substitute and choose the appropriate course for your exception.
8.	Once you have completed and saved your exception you can simply close the UAccess window and return to the advisement to enter more exceptions or to refresh the report. To enter more exceptions just follow the same process by clicking Substitute or Pair where you want to enter you exception. Please note that new exceptions won't appear on the advising report until you have refreshed it. To refresh the advising report scroll to the bottom of the report and click on "**Return to Report Request**." Next, click "**Process Request**" to generate a new online advising report that will be up to date with the exceptions you just made.
9.	The process works the same when using the **Substitute/Exclude** link. The only difference is you don't have a course that is automatically excluded.

Science and Pre-Professional Option Requirements (R2410)

Not Satisfied: Science and Pre-Professional Option Requirements

▼ **1. Core Courses (R2410/L10)**

Not Satisfied: Complete 7 units. Choose one course between MCB 410 or MCB 305.

- Units: 7.00 required, 1.00 taken, 6.00 needed

The following courses may be used to satisfy this requirement:

Personalize | View All | 🔲   First ◀ 1-4 of 4 ▶ Last

Course	Description	Units	When	Grade	RptCd	RqDes	Notes	Status	Pair
ACBS 102L	Intro to Animal Sci Lab	1.00	Fall 2020	A				✅	Pair
ACBS 445	Nutrition Physio+Metabol	3.00	Fall						Pair
MCB 305	CellDevelopment Biology	4.00 - 5.00	Fall						Pair
MCB 410	Cell Biology *** view multiple offerings	3.00 - 4.00							Pair

Substitute/Exclude

Authorize Student Exceptions

Authorize Student Exceptions

Find | View All   First ◀ 1 of 1 ▶ Last

Advisement Override 000000000   User ID: Julie Dupuy

*Requirement Term Date 08/24/2020   *Status Active

*Description

*Short Description

*Long Description

Override Details

*Academic Institution UAZ00   The University of Arizona
*Academic Career UGRD   Undergraduate
Academic Program UAGSC   College of Ag & Life Sciences   Create Exception
Academic Plan ASCBS   Animal Sciences
Academic Sub-Plan
*Selection Code Student
*Selection Data 23591256
*Operation Code Course Directive

Save | Notify   Add | Update/Display | Include History | Correct History

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Step	Action
10.	Notice how this time the program and plan information pulls in to the exception since it is needed for an exception to the major.

Step	Action
11.	Once you click Create Exception, you'll see that, again, the requirement group, requirement, and line number have all populated with the correct information. However, no course is automatically excluded. At this point you are ready to substitute or exclude courses to the line.

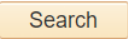| Step	Action
12.	If the course (i.e. course offering, enrollment, test, or transfer) is already being used in an active exception you will get a warning message telling you where the course has already been used and what the corresponding advisement override number is. This is just a warning, so you can still click okay and save your exception and have it apply to the advising report. If you do not want to use the course in your exception you can either select a different course or delete the exception. Note: This warning references the advising report and searches for exceptions that are being *applied* to the advising report. So if you are inputting multiple exceptions at once without refreshing the report you will not see this error, nor will you see this warning if the course was used in an exception that is not being applied (e.g. the course was used in an exception to a major that the student dropped).

Looking up a Student's Exceptions

To look up a student's exceptions navigate to:
Academic Advisement →Student Advisement → Authorize Student Exceptions

Step	Action
1.	Select **Student** as the Selection Code.
2.	In the Selection Data field, enter the **Student ID** that you wish to look up.
3.	Check the **Correct History** box to allow you to make changes to the student's exceptions that you are looking up. ✅ Correct History
4.	Click Search. ⬛ Search This will bring up a list of all the Exceptions that this Student has. Select the one that you wish to view, change or delete.

Deleting an Exception

To delete an Exception, first you will need to **Look up the Student's Exception** that you want to delete by following the steps above.

Once you have opened the exception that you want to delete, follow these steps:

Step	Action
1.	To delete this exception, you first need to click on the Correct History button on the bottom right of the first page. **Correct History**
2.	Once you are in Correct History mode, go to the top right of the page and click the blue minus button .
3.	A Delete Confirmation message will appear asking if you want to delete current/selected row. Click ok.
4.	Click Save. **Save**
5.	The Exception is now Deleted. **End of Procedure.**

Making an Exception Inactive

To an Exception inactive removes it from a student's advisement report but keeps it in the system to be edited at a later date.

Once you have opened the exception that you want to make inactive, follow these steps:

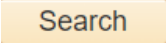| Step	Action
1.	To make this exception inactive, you first need to click on the Correct History button on the bottom right of the first page.
2.	Once you are in Correct History mode, go to the Status field top right of the page and click the down arrow to select Inactive.
3.	Click Save.
4.	The Exception is now Inactive. **End of Procedure.**
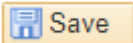
Viewing all exception created on a student's Advisement Report

The UA Exceptions Summary page was created to display all exceptions that have been made to a student's advisement report. The page is broken into requirement groups to where to exceptions have been made. Every section displays all relevant information for each exception. The Advisement Override number, in each box, is a link to the exception where any edits can be made.

Navigation:

Academic Advisement → Student Advisement → UA Exception Summary

Step	Action
1.	Enter the student ID in the ID field and hit search.
	Search

Step	Action
1.	To edit an exception from the Exception Summary Page, click on the Override number link. A new window will pop up with the Authorize Student Exception page, for that exception.
2.	Click the Correct History button before making edits. Correct History
3.	Once you are in Correct History mode, make any necessary edits.
4.	Click Save. Save
5.	**End of Procedure.**

Appendix

Exception Help Guide

Desired Exception	UAccess Exception Code to Use
To add an additional course to an existing requirement in a major or minor	Course Directive
To exclude a course from an existing requirement in a major or minor	Course Directive
To make a course substitution of one course for another course to a requirement in a major or minor	Course Directive Substitution Course Directive Exclusion
To waive a course from a requirement in a major or minor	Requirement or Requirement Line Change to change the requirement AND Course Directive to exclude that course from the requirement
To waive hours from a requirement in a major or minor	Requirement or Requirement Line Change to change the course count or the required hours
To waive an entire Requirement or Requirement Line	Requirement Waiver
To split units between two Requirements or Requirement Lines	Eg. A student transfers in a 6 unit course and you want to use 3 units in the student's Major and 3 units in Gen. Ed. Course Directive to direct the course to the student's Major (this directs all 6 units) AND Requirement or Requirement Line Change (to waive 3 units in Gen. Ed. These 3 units were fulfilled with the 6 unit class that you directed to their Major)