

NAVIGATION OF GENERAL STUDENT (SGASTDN)

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REVISION HISTORY

Version	Date	Name	Description

INTRODUCTION AND PURPOSE

The purpose of this document is to explain how the student record is recorded and viewed in SGASTDN or the General Student record in Banner. The form contains general but important information on the type of student and program of study over time. This navigation is not intended to instruct a user how to make changes on this form but to provide an understanding of the data it contains.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

The form is updated by designated offices on campus. Certain fields such as student status, residency for tuition purposes, and fee assessment rate are updated by the Registrar and/or offices that are an extension of the Registrar, such as Student Affairs Information Systems, Summer Session, and the Graduate Division Academic Affairs Office. Due to the wide use of this form, it is essential that the meaning and nuances of the record are understood.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

Most users on campus utilize this form to understand a student’s basic information.

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbx.ucr.edu) to follow along.

FORMS

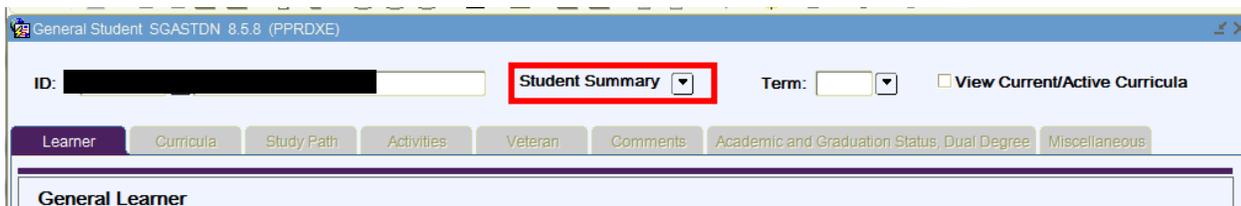
The forms listed below are covered in this training.

Form	Form Name	Description

PROCEDURES TO VIEW THE GENERAL STUDENT RECORD (SGASTDN)

KEY BLOCK

1. **Student ID**
 - a. The student number is the identification number assigned to the student upon first entering or registering at UCR.
2. **Student Name**
 - a. This field is searchable by using the down arrow in front of this field.
 - b. Search for a student by name.
3. **Term**
 - a. Best Practice is to leave this field blank. If a specific term is entered, Banner will not display any Learner records *after* the record in which the term entered spans. The benefits of leaving this field blank is that the user can:
 - i. Automatically view the newest record first and
 - ii. Scroll through to view all other records.
4. **View Current/Active Curricula**
 - a. Check this box to limit the display of curriculum records in the Curriculum and Field of Study tabs to only those that are current and active.
5. **Student Summary** - This button changes the view from a specific General Learner Record to a summary of each General Learner Record.
 - a. Make sure there is no Term in the Key Block before you select the Student Summary.



- b. The user can get an overview of periods when the student was inactive.
- c. Although each row represents a period of time that may span several terms, the **Academic Standing field** shows the standing calculated in the earliest term, or the From Term.
- d. The **override in Academic standing** is used when a Dismissed Student returns for Summer Session.
- e. **Progress Evaluation** is not used.
- f. **Combined Academic Standing** is used to record the academic standing a student earned in the term they are academically dismissed. This is necessary to place in another field because the academic dismissal code replaces the earned standing code in that term.

The screenshot shows the 'General Student Summary' application. At the top, there are search filters for ID, Level, Campus, College, Degree, Term, Program, Field of Study Type, and Field of Study Code. The main area contains four summary tables, each with a red box around its header:

- Student Summary:** Columns include From Term, To Term, Student Status, Student Type, and Residence.
- Academic Standing:** Columns include Code, Term, and Override Code/Term.
- Progress Evaluation:** Columns include Code, Type, and Override Code/Term.
- Combined Academic Standing:** Columns include Code, Type, and Override Code/Term.

Below the tables are two summary sections:

- Curricula Summary - Primary:** Fields for Priority Term, Program, Catalog, Student Level, Campus, Rate, College, and Degree.
- Field of Study Summary:** Fields for Priority Term, Type, Field of Study, Department, and Attached to Major.

GENERAL LEARNER

1. **New Term** - Shows the effective term of the General Learner record being viewed.
 - a. If the term in the Key Block is left blank, the first General Learner Record will always show the most recent record regardless of an “active” or “inactive” student status. When you use the scroll bar in this block, the New Term shows the effective term a change was made to the student’s General Learner and/or Curriculum.
2. **From Term** - Shows the effective term of a specific General Learner Record.
 - a. When you use the scroll bar, the From Term changes to show the effective term a change was made to the Student’s General Learner Record and/or Curriculum.
 - b. The period between the From Term and the To Term means that the data on the Learner record and the curriculum stayed the same during those terms.
3. **To Term** - Shows end term of the General Learner Record.
 - a. When you use the scroll bar, the “To Term” changes to show the quarter the next General Learner Record was effective, therefore, the “To Term” is not inclusive. The General Learner Record is effective up *until* this term.
 - b. For example, if the student status is active from 201440 (From Term) to 201540 (To Term), then switches to inactive in 201540 (new From Term once you scroll), Fall 2015 is the first term the student was inactive.
 - c. When the “To Term” shows 999999, this means “to the end of time”. The record remains the same until there is a change to the student’s General Learner Record or Curriculum. Once a change is made, the “To Term” shows the term that the change took place and a new Learner Record is created with 999999 as the “To Term”.
4. **Student Status** - Active, Inactive, or Eligible to Readmit
 - a. The Registrar, Graduate Division Academic Affairs and Undergraduate Admissions Offices update this field
 - b. An inactive status prevents enrollment but does not prevent the student from accessing their record for items like requesting a transcript, viewing grades, or applying for graduation
 - c. Some examples when students may have an inactive status include the final lapse before the term begins, cancellations, withdrawal, dismissals, graduation, or an approved leave of absence.

- d. The Eligible to Readmit Status is used for undergraduate students who accept the admission offer and enroll but decide to not attend that term. This status indicates the student is eligible to readmit without re-applying for admission for one year.
- 5. **Student Type** - This field gives a specific designation for the Learner record.
 - a. The first term, for most students, will have one of these codes:
 - i. First Time Freshman (F)
 - ii. First Time Graduate (G)
 - iii. First Time Medical (M)
 - iv. Post Baccalaureate (P)
 - v. First Time Transfer (T)
 - vi. Readmitted/ Returning (R) – will be their first term returning from an inactive status.
 - b. Active terms following the initial Student Type code are given the student type “C” for continuing.
 - c. Student Types that do *not* change to C for Continuing for subsequent terms are:
 - i. Visitor (V)
 - ii. Summer Session (S) (for non-degree seeking students)
 - iii. Archived Transcript/ URIS (X)
- 6. **Residence** - Shows the student residency for tuition purposes.
 - a. Students who are approved for a waiver of the non-resident supplemental tuition will show as a non-resident student in this field and then will be assigned an exemption on the financial record to remove the charge from their account.
- 7. **Fee Assessment Rate** - This is designated for Special Programs, Filing Fee status and Tuition Assistance Program.
 - a. Special programs that are identified in this field include:

Code	Description
CSI	CSU San Ber Cross-Reg Incoming
CSO	CSU San Ber Cross-Reg Outgoing
DCI	UC Washington Center Incoming
DCO	UC Washington Center Outgoing
EAP	Educ Abroad Prog Home student
EAR	Educ Abroad Prog Reciprocity
FIL	Filing Fee
IEI	Intercamp Exchg Grad Incoming
IEO	Intercamp Exchg Grad Outgoing
IVI	Intercampus Visitor Incoming
IVO	Intercampus Visitor Outgoing
KIL	Killea Concur SB1914
SEI	Simultaneous Enrlmt Incoming
SEO	Simultaneous Enrlmt Outgoing
TAP	Tuition Assistance Program
UCOI	UCOE Cross-Campus Incoming
UCOO	UCOE Cross-Campus Outgoing
UCS	UC Sacramento Center Program

- b. This field is updated by the Registrar’s Office or Graduate Division.
- 8. **Class** - shows the student’s class standing.

- a. This field is not updatable. For Undergraduates, the class is a calculated field based on total Earned Units.
 - b. Graduate, Medical, and Visiting students' class is maintained by the student affairs offices representing these populations.
9. **Student Centric Cycle** - this is not used.

The screenshot shows the 'General Learner' form. On the left, a red box highlights the following fields: 'New Term' (201540, Fall 2015), 'Student Status' (AS, Active), 'Student Type' (C, Continuing), 'Residence' (R, Confirmed CA Resident), 'Fee Assessment Rate', 'Class' (VS, Visiting/Non-degree seeking), and 'Student Centric Cycle'. On the right, another red box highlights the 'From Term' (201540) and 'To Term' (999999) fields. Below these is an 'Additional Information' box containing 'Site', 'Session', 'Block', and 'Citizenship' fields.

ADDITIONAL INFORMATION BOX

- 1. **Site** - This is used to indicate which UC Institution a UCR student is attending during a Special Program or which UC Institution is a UCR visitor's Home Campus.
- 2. **Session** - this is not used.
- 3. **Block** - represents a group of course sections that are taken together.
 - a. This field is used to facilitate registration and is not meant to be used to classify students.
- 4. **Citizenship** - Pulls the citizenship information from SPAIDEN.
 - a. This is not updatable from this form, it is only Informational.

This close-up screenshot shows the 'Additional Information' box. At the top, 'From Term' is 201820 and 'To Term' is 999999. The 'Additional Information' box contains: 'Site' (LA, UC Los Angeles), 'Session' (empty), 'Block' (empty), and 'Citizenship' (Y, Citizen). Red boxes highlight the 'Site' and 'Block' fields.

CURRICULA SUMMARY

This information is a summary of the Curricula tab and represents the student's current and active curriculum.

- 1. You can view a history of the student's curricula by using the General Learner scroll bar.

2. If a student has more than one active curriculum at one time, you can view each by using the scroll bar in the Curricula Summary.
3. **Priority** - The lowest number indicates the Primary Curricula.
4. **Term** - The term a change occurred to the curricula.
5. **Program** - This is the combination of the student's Degree and Major.
6. **Catalog** - The catalog year specifying which requirements the student needs to meet in the degree audit.
 - a. The catalog requirements apply to one academic year and correspond to Fall, Winter, Spring and Summer - in that order. For example, the terms Fall 2016, Winter 2017, Spring 2017, and Summer 2017 would all utilize the same 2016-17 Catalog requirements.
7. **Level** - The most basic classification of a student.
 - a. Undergraduate, Graduate, Medical.
8. **Campus** - Riverside.
9. **College** - All students are assigned to a college associated with their course of study. For example, a Master of Science in Computer Engineering is assigned the college code for the Bourns College of Engineering.
10. **Degree** - The type of degree a student is seeking.
 - a. Examples: B.S., B.A., MS, Ph.D., MA, MBA, MD, MED, MFA

The screenshot shows the 'General Learner' interface with several sections:

- General Learner** section with fields for:
 - New Term: 201820 (Spring 2018)
 - Student Status: AS Active
 - Student Type: C Continuing
 - Residence: U Undetermined
 - Fee Assessment Rate: FIL Filing Fee
 - Class: MR Masters
 - Student Centric Cycle: [dropdown]
 - From Term: 201820 To Term: 999999
 - Additional Information: Site, Session, Block, Citizenship (Y Citizen)
- Curricula Summary - Primary** table:

Priority	Term	Program	Catalog	Student Type	Level	Campus	Rate	College	Degree
1	201820	MS in Anthropology	201340	First Time Freshman	Graduate	Riverside		Humanities, Arts, and Soc	Master of Science
End:		Outcome Key:		Admission Type:		Admission:		Matriculation:	
- Field of Study Summary** table:

Priority	Term	Type	Field of Study	Department	Attached to Major
1	201820	Major	Anthropology	Anthropology	

FIELD OF STUDY SUMMARY

This block designates the majors, minors, and concentrations on a student record that are associated with the program seen in the Curricula Summary.

1. This information is attached to the General Learner and Curricula Records and changes by using the General Learner scroll bar and the Curricula Summary scroll bar if activated.
2. **Priority** - The lowest number indicates the Primary Field of Study. For example, a student with two minors has different numbers indicating a primary minor.

3. **Term** - The term a curricula change became effective.
4. **Type** - the types are Major, Minor, or Concentration.
5. **Field of Study** - The description of the student's major, Minor, or Concentration.
6. **Department** - The home department of the Major.
7. **Attached to Major** - this is used for concentrations to specify which major the concentration corresponds to.

Field of Study Summary					
Priority	Term	Type	Field of Study	Department	Attached to Major 
1	201520	Major	Economics/Admin Studies	Economics	
1	201520	Concentration	Finance		Economics/Admin Studies

CURRICULUM TAB

1. The Current Active Curriculum has the **"Current" Box** checked and the **"Activity" Field** says **ACTIVE**.
 - a. If the student has more than one current and active curriculum the yellow arrow keys on the upper, right corner of this tab will allow you to move between the multiple records.
 - b. You can scroll through the historical Curriculum Records, as long as the "View Current/Active Curricula" box in the key block is *not* checked by using the yellow arrow keys.
2. **Term** - The term a change occurred to the curricula.
3. **Catalog** - The catalog year specifying which requirements the student needs to meet for graduation.
 - a. The catalog requirements apply to one academic year and correspond to Fall, Winter, Spring and Summer - in that order. For example, the terms Fall 2016, Winter 2017, Spring 2017, and Summer 2017 would all utilize the same 2016-17 Catalog requirements.
 - b. This is maintained by the academic advisors.
4. **Priority** - The lowest number indicates the Primary Curricula.
5. **Program** - This is the combination of the student's Degree and Major.
6. **Level** - The most basic classification of a student.
 - a. Undergraduate, Graduate, or Medical.
7. **Campus** - Riverside.
8. **College** - All students are assigned to a college associated with their course of study. For example, a Master of Science in Computer Engineering is assigned the college code for the Bourns College of Engineering.
9. **Degree** - The type of degree a student is seeking.
 - a. Examples: B.S., B.A., MS, Ph.D., MA, MBA, MD, MED, MFA.
10. **User ID** and **Activity Date** show the last time the General Learner Record or the Curricula was changed and by whom.

The screenshot displays the 'Field of Study' tab with the following highlighted elements:

- Record 1 of 1** (top right)
- Current:** **Replace:** **Update:** **Duplicate:**
- Activity:** ACTIVE
- Apply to Graduate:**
- Roll Learner:** Yes No Default **Roll to Outcome:**
- Key Sequence:** 99
- Term:** 201520 Spring 2015
- User ID:** CONVERSION
- Activity Date:** 26-SEP-2015
- Catalog Term:** 201340 Fall 2013
- Priority:** 1
- Program:** BA-ECAT BA in Economics/Admin Studies
- Level:** U Undergraduate
- Campus:** C Riverside
- College:** HS Humanities, Arts, and Soc Sci
- Degree:** BA Bachelor of Arts

FIELD OF STUDY TAB

- Review the Curriculum tab before proceeding to the **Field of Study** tab. The fields of study visible correspond to the program on the Curriculum tab.
 - The Curriculum block at the top of the Field of Study tab provides a convenient summary of the information on the Curriculum Tab
 - The majors, minors, and concentrations associated with the curriculum previously viewed on the Curriculum tab are visible.
 - Other fields of study active for a student may be associated with another curriculum. You can view them one of two ways:
 - The user would need to be viewing the corresponding curricula on the Curriculum tab before proceeding to the Field of Study tab. -OR-
 - You can scroll through the Field of Study Records, as long as the “View Current/Active Curricula” box in the Key Block is checked, by using the yellow arrow keys on the upper, right corner of the Field of Study tab.
 - You can scroll through historical Field of Study records as long as the “View Current/Active Curricula” box in the key block is *not* checked by using the yellow arrow keys.
- The Current, Active Curriculum is identified by the “**Current**” box being checked and the “**Activity**” Field says **ACTIVE** in the Field of Study block.
- Status** - Auto-populates as INPROGRESS.
- Priority** - The lowest priority indicates the primary field of study for *that particular field of study type*.
 - If there are 2 minors or concentrations the primary one is the lowest number. For example, the lowest number indicates the primary concentration for a student with 2 concentrations.
- Department** - The department for the major is listed.
- Attached to Major** - This is used for concentrations to specify which major the concentration corresponds to.

STUDY PATH TAB

Note: This tab is not used.

ACTIVITIES TAB

This tab is used to record terms and countries of students who participate in **Planned Opportunities Abroad Program (POAA)**. Each term the student is on leave will show a separate row designating when and where the student went on the POAA program.

1. **Term** - This indicates the term the student is on leave.
2. **Activity Code** - This indicates which country the student visited.
3. **Description** - This shows the country name.
4. **Activity Date** - This shows when the information was entered.

Term	Activity Code	Description	Activity Date
201440	PJA	Japan	29-SEP-2014

This is required data to report to UCOP. We do not collect information of this nature for EAP. EAP is designated by the Rate Code on the Learner record and the country information is provided with the course in academic history.

VETERANS TAB

Note: Only Student Special Services will utilize this tab.

COMMENTS TAB

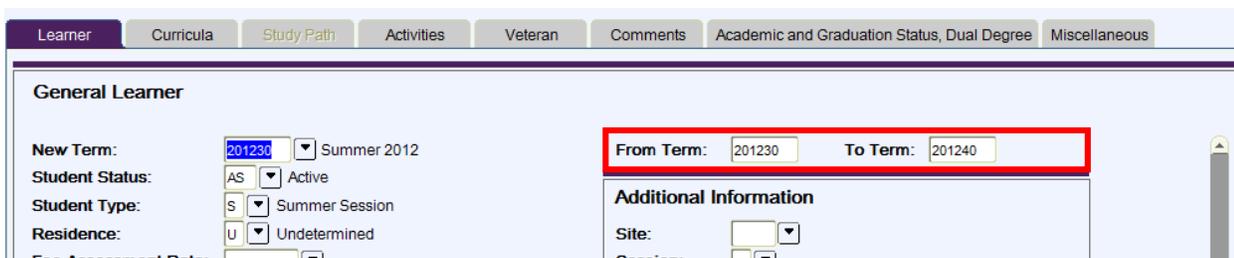
Note: This tab is not used. Comments can be viewed and recorded in other forms.

ACADEMIC AND GRADUATION STATUS, DUAL DEGREE TAB

View the range of terms on the Learner record before proceeding to this tab. The information on this tab corresponds to the General Learner record that is being viewed.

1. **Academic Term** – the term in which the Academic Action was earned.
 - a. For example, if the Academic Term has fall term and the Academic Status has Probation then the student earned Probation at the end of fall term.
 - b. View the From Term and To Term range on the Learner tab. If the term field is blank in the key block the Academic Action showing is for the most recent term included in that range. (**Note:** the To Term is not inclusive so would not be included. It may be helpful to review the definitions of the From Term and To Term above).

For example, a student’s Learner Record with the range of terms below:



Shows the academic status for 201230 when the Academic and Graduation Status, Dual Degree tab is accessed:

The screenshot shows a web interface with tabs: Learner, Curricula, Study Path, Activities, Veteran, Comments, Academic and Graduation Status, Dual Degree, and Miscellaneous. The 'Academic and Graduation Status' tab is active. The 'Academic Status' section is highlighted with a red box and contains the following fields:

- Academic Term: 201230
- Academic Status: CD Cont Subj to Disqualification
- Academic Standing Override: [dropdown]
- Academic Status Override Term: [dropdown]

The 'Graduation Status' section to the right contains:

- Expected Graduation Date: 01-SEP-2012
- Graduation Term: 201230
- Graduation Year: 2011

You can also enter a term in the key block and the Academic Action earned for that specific term displays.

2. **Status** - the academic action that was earned.
 - a. Dismissals are also recorded in this field.
3. **Academic Standing Override** - this is for Summer Session enrollment for UCR Academically Dismissed Students Only.
 - a. Summer Session works with the College Offices to update this to allow the student to enroll for summer only.
4. **Academic Status Override Term** - This is always a Summer Session term.
 - a. This field corresponds to the Academic Standing Override field.
5. **Progress Evaluation** - is not used.
6. **Combined Academic Standing** - is used to record the academic standing a student earned in the term they are academically dismissed. This is necessary to place in another field because the academic dismissal code replaces the earned standing code in that term.

The screenshot shows the same web interface. The 'Academic Status' section is highlighted with a red box and contains the following fields:

- Academic Term: 201620
- Academic Status: AD Academic Dismissal
- Academic Standing Override: DD Subject to Disqualification
- Academic Status Override Term: 201630

Below this, there are fields for Progress Evaluation, Progress Evaluation Override, and Progress Evaluation Override Term.

The 'Combined Academic Standing' section is also highlighted with a red box and contains:

- Combined Academic Standing: DD Subject to Disqualification
- Combined Academic Standing Override: [dropdown]
- Combined Academic Standing Override Term: [dropdown]

7. **Expected Graduation Date** - The date is always the last day of the term per the academic calendar. Upon matriculation to a degree-seeking program, this field will auto-populate and thereafter is updated by academic advisors.
 - a. Undergraduate Degree Seeking Students.
 - i. If a first-year (freshman) undergraduate student, AGD = Current term + 4 years
 - ii. If a second-year (sophomore) undergraduate student, AGD = Current term + 3 years
 - iii. If a third-year (junior) undergraduate student, AGD = Current term + 2 years
 - iv. If a fourth-year (senior) undergraduate student, AGD = Current term + 1 year
 - v. Else, AGD = end of current academic year
 - b. Medical Students – auto-populates for 4 years.
 - c. Graduate and Professional students - auto-populates and lengths vary by degree and major.
8. **Graduation Term** - corresponds to the expected graduation date. Upon matriculation to a degree-seeking program, this field auto-populates and thereafter is updated by academic advisors.
9. **Graduation year** - The academic year that corresponds to the expected graduation date. Upon matriculation to a degree-seeking program this field auto-populates and thereafter is updated by academic advisors.
 - a. The graduation year is driven by the fall quarter for the academic year (fall, winter, spring and summer). For example, the graduation year of 2015 includes Fall 2015, Winter 2016, Spring 2016 and Summer 2016.
10. **Dual Degree box** - These fields are not used.

The screenshot shows a web interface with several tabs: Learner, Curricula, Study Path, Activities, Veteran, Comments, Academic and Graduation Status, Dual Degree, and Miscellaneous. The 'Academic and Graduation Status, Dual Degree' tab is active. It is divided into two main sections: 'Academic Status' and 'Graduation Status'.

Academic Status fields include:

- Academic Term: 201540
- Academic Status: CD | Cont Subj to Disqualification
- Academic Standing Override: []
- Academic Status Override Term: []
- Progress Evaluation: []
- Progress Evaluation Override: []
- Progress Evaluation Override Term: []
- Combined Academic Standing: []
- Combined Academic Standing Override: []
- Combined Academic Standing Override Term: []

Graduation Status fields (highlighted in red):

- Expected Graduation Date: 10-JUN-2016
- Graduation Term: 201620
- Graduation Year: 2015

Dual Degree fields:

- Degree: []
- Level: []
- College: []
- Department: []
- Major: []

MISCELLANEOUS TAB

1. **Leave of Absence** - students who apply for and receive approved leave have a code in this field. The description indicates the type of leave that was approved.
2. **From Date** - The first day of the Quarter of the first effective term of the Planned Leave as outlined in the academic calendar.
3. **To Date** - The last day of the Quarter of the last effective term of the Planned Leave as outlined in the academic calendar.
4. Students on a Planned Leave have an **inactive** General Learner record during terms they are on leave.

Leamer Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree **Miscellaneous**

Miscellaneous Information

Orientation Session:	<input type="text"/> ▾	Employee and Training Code:	<input type="text"/> ▾
Career Plan:	<input type="text"/> ▾	Vocational Education:	<input type="text"/> ▾
Practical Training:	<input type="text"/> ▾	Transfer Center:	<input type="text"/> ▾
Education Level:	<input type="text"/> ▾	Educational Goal:	<input type="text"/> ▾
Income Range:	<input type="text"/> ▾	Basic Skills:	<input type="text"/> ▾
Employment Expectation:	<input type="text"/> ▾	<input type="checkbox"/> Graduate Credit Approved	
Apprenticeship Code:	<input type="text"/> ▾		
Leave of Absence:	E ▾ Undergraduate Leave - PELP	From Date:	02-JAN-2015
		To Date:	12-JUN-2015