

Student Plan Change Request

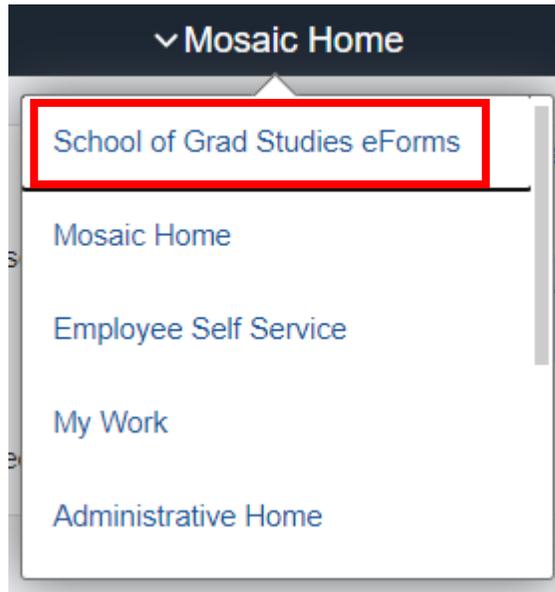
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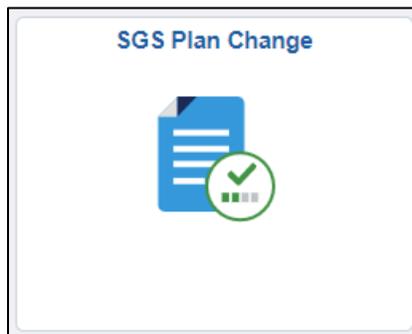
Student Plan Change Request

Submit a Plan Change Request

1. Sign into Mosaic.
2. Click the Mosaic Home menu at the top of the screen and click the School of Grad Studies eForm Homepage option.

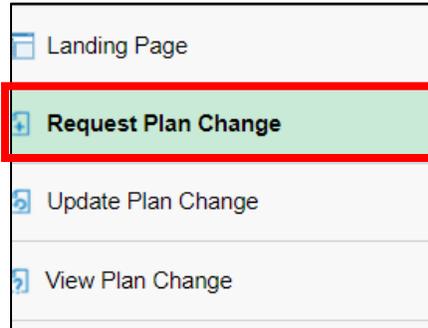


3. Click the SGS Plan Change tile



4. From the SGS Plan Change landing page, click on Request Plan Change from the left navigation bar.

Student Plan Change Request



5. There are instructions throughout the form to guide you through the request process.
6. In the Current Student Information section, your Student ID and preferred name (as it appears in Mosaic) will pre-populate on the form.

A screenshot of a form section titled 'Current Student Information'. Below the title, there are three labels: 'Student ID', 'Last Name', and 'First Name', each followed by a text input field.

7. In the Current Program and Plan Information section, use the look up icon in the Academic Program field to select your current program.

***Note: only the program you are active in will appear for selection.**

A screenshot of a form section titled 'Current Program and Plan Information'. Below the title, there is a line of text: 'Select your current program from the 'Academic Program' look up. Please confirm your current program and plan information is accurate.' Below this text, there are two input fields: '*Academic Program' and 'Academic Plan'. The '*Academic Program' field has a search icon (magnifying glass) to its right, which is highlighted with a red square.

8. The following fields are to be completed prior to submitting the form:
 - In the Plan Change request Details section, you will be able to select the term in which the plan change will be effective using the look up icon in the Term field. **Terms that have passed will not be available for selection.**
 - In the New Academic Plan field, use the look up icon to select which plan you wish to change to. **Please consult with your Program Office if you have questions regarding which plan code you should be selecting.**

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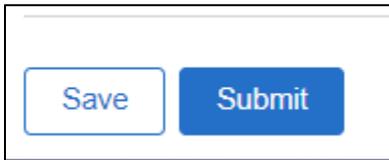
Plan Change Request Details

1. Select the term that plan change will be effective for using the 'Term' look up. Please select only a current or future term. **Note: You will only be able to select a term within the current academic year. Terms that have passed will not be accepted.**
2. Select your new academic plan using the 'Academic Plan' look up.

*Term 

*New Academic Plan 

9. Once all required fields, identified with an asterisk (*) have been completed, you can submit the form using the **submit** button at the bottom of the page.
 - If you wish to leave the form and continue working on it later, you can click the **save** button at the bottom of the page.



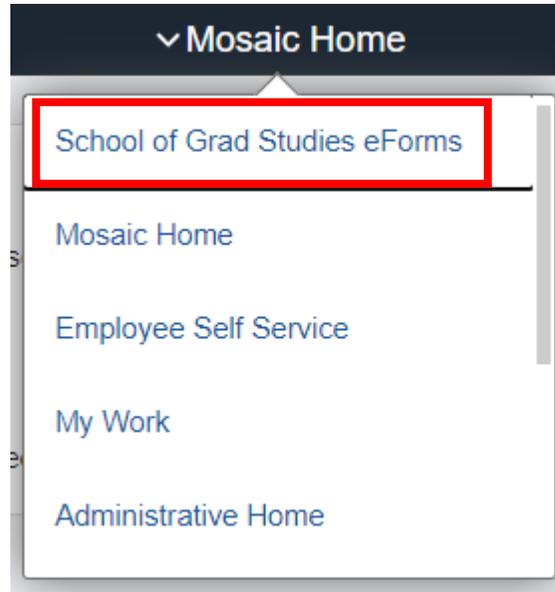
10. When you have submitted your form, you will receive an email notification that it has been submitted and routed to your graduate administrator for review and approval.
10. When your request has been approved and processed, you will receive an email notification.

Update a Plan Change Request

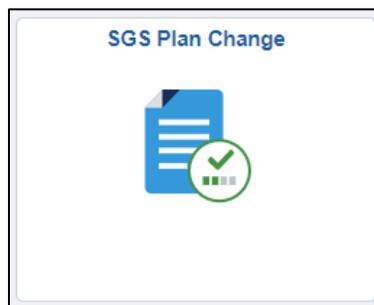
Updating a form can be done if a form is partially completed and saved. Updating a form can also be used if a form has been returned to you requesting more information.

1. Sign into Mosaic.
2. Click the Mosaic Home menu at the top of the screen and click the School of Grad Studies eForm Homepage option.

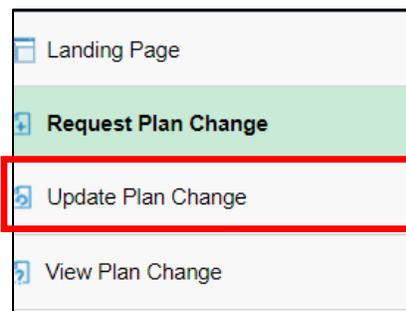
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3. Click the **SGS Plan Change** tile



4. From the SGS Plan Change landing page, click on **Update Plan Change** from the left navigation bar.



5. Enter the Form ID on the search page of the form you wish to update. To see all forms you have in progress/submitted, leave all fields blank and click the **search** button at the bottom of the page.

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SGS Plan Change

Search by:

Form ID	Begins With	<input type="text"/>							
Form Type	Begins With	<input type="text"/>							
Form Status	is Equal To	<input type="text"/>							
Student ID	Begins With	<input type="text"/>							
First Name	Begins With	<input type="text"/>							
Last Name	Begins With	<input type="text"/>							
Term	Begins With	<input type="text"/>							
Academic Organization	Begins With	<input type="text"/>							
Department	Begins With	<input type="text"/>							
Academic Program	Begins With	<input type="text"/>							
Academic Plan	Begins With	<input type="text"/>							
New Academic Plan	Begins With	<input type="text"/>							

6. Click any link on the result to open the form.

Note: under the Form Status column, a status of saved means the form was initiated but not submitted. If the form has a status of recycled, the approver has sent back the form to you.

Form ID	Form Type	Form Status	Student ID	Term	Academic Program	New Academic Plan	Academic Plan	Display Name
1	MCM_SGS_PL	Pending	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)

7. Review and complete the form as necessary.

Note: If the form was in recycled status and was sent back for corrections/ additional information, review the comments section at the bottom of the form details regarding your request.

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▼ Comments

- Once the form is complete, click the **submit** button at the bottom of the page.
 - The form can also be saved again by clicking the save button, or it can be withdrawn by clicking the withdraw button.

Note: when clicking withdraw, it will delete the form and all progress will be lost.

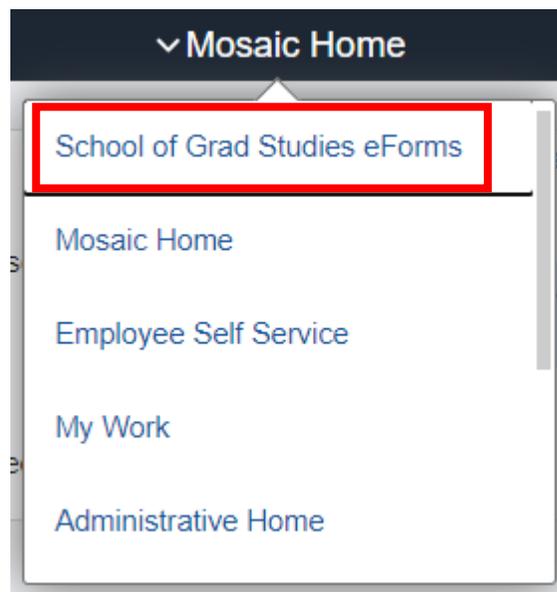


▼ Comments

View a Plan Change Request

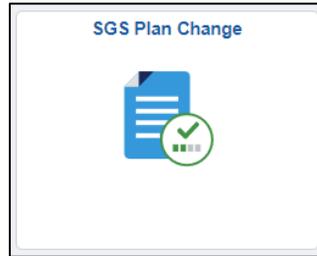
Viewing a form can be used to see the status of any forms in progress or submitted. The form will not be editable when using the view form function.

- Sign into Mosaic.
- Click the Mosaic Home menu at the top of the screen and click the School of Grad Studies eForm Homepage option.

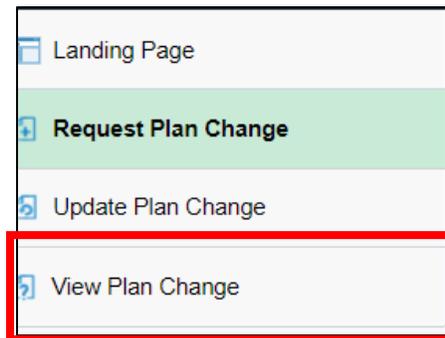


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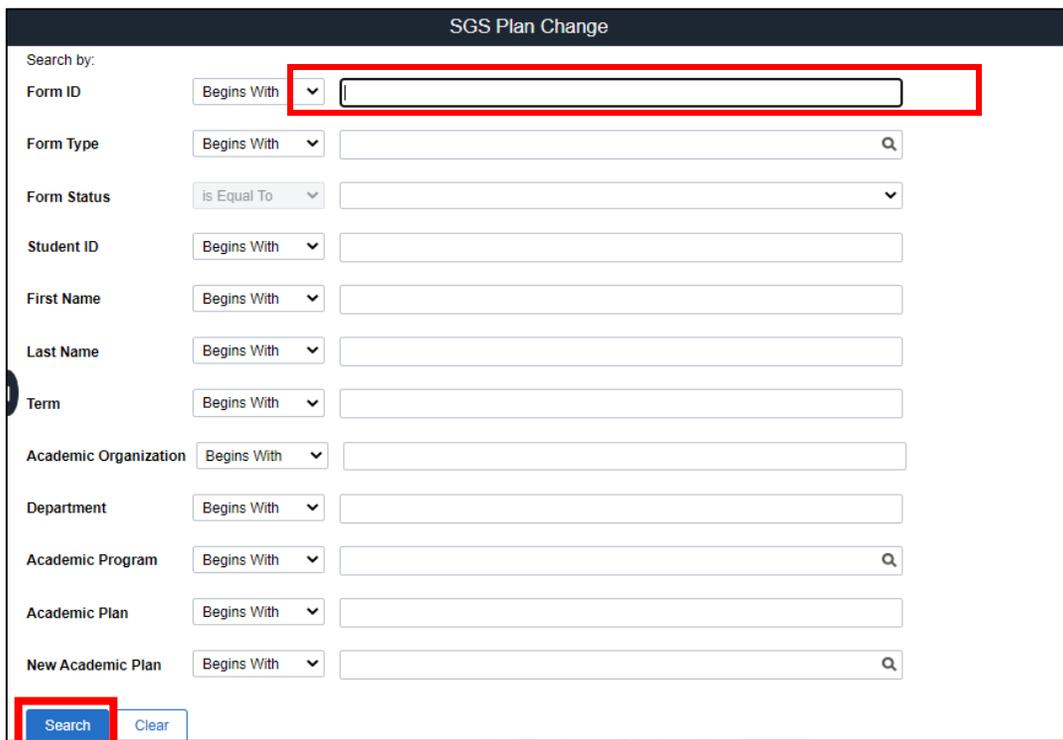
- Click the SGS Plan Change tile



- From the SGS Plan Change landing page, click on **View Plan Change** from the left navigation bar.



- Enter the Form ID on the search page of the form you wish to update. To see all forms you have in progress/submitted, leave all fields blank and click the **search** button at the bottom of the page.

A search form titled "SGS Plan Change" with a dark header. It contains several search criteria, each with a dropdown menu and a text input field. The "Form ID" dropdown is set to "Begins With" and its input field is highlighted with a red border. At the bottom, there is a blue "Search" button and a light blue "Clear" button, both highlighted with red borders. The search criteria include: Form ID, Form Type, Form Status, Student ID, First Name, Last Name, Term, Academic Organization, Department, Academic Program, Academic Plan, and New Academic Plan.

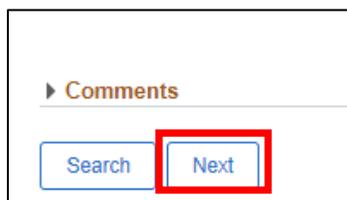
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6. Click any link on the result to open the form.

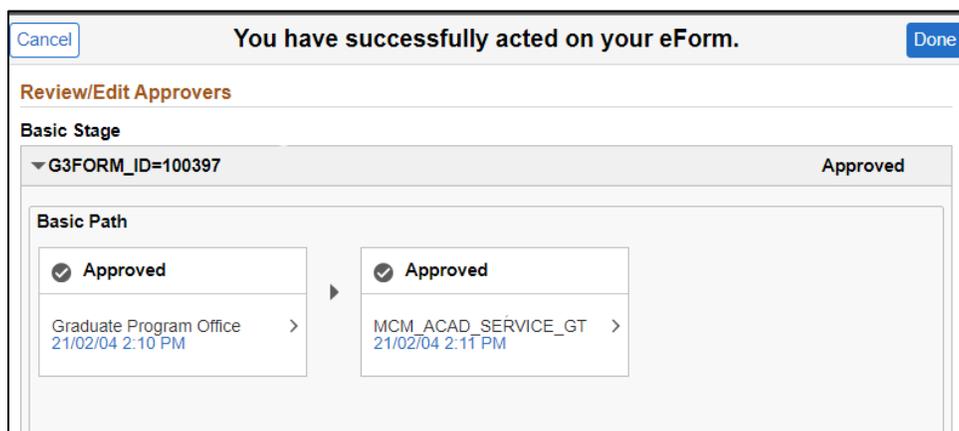
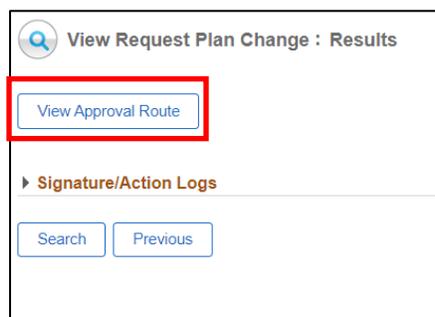
Note: under the **Form Status** column, a status of **saved** means the form was initiated but not submitted. If the form has a status of **recycled**, the approver has sent back the form to you.

Form ID	Form Type	Form Status	Student ID	Term	Academic Program	New Academic Plan	Academic Plan	Display Name
1	MCM_SGS_PL	Pending	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)

7. To see the approval status, click the **Next** button at the bottom of the page.



8. Click the **View Approval Route** button to view the form status. A list of approvers and status on the approval chain will appear.



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9. To view additional form details, expand the **Signature/Action Logs** section.

View Request Plan Change : Results

View Approval Route

▸ Signature/Action Logs

Search Previous

▼ Signature/Action Logs

Transaction / Signature Log 5 rows

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	2021/02/04 2:07:58PM	Initiated			Submit	
2	2021/02/04 2:10:10PM	GTAdmin: Graduate Program Office			Approve	2 minutes
3	2021/02/04 2:10:10PM	Graduate Program Office			Approve	< 1 minute
4	2021/02/04 2:11:32PM	MCM_ACAD_SERVICE_GT			Authorize	1 minute
5	2021/02/04 2:11:36PM	System	System			< 1 minute