Adding a Missing Plan to a Milestone - Detailed Instructions

Due: September 25, 2018 at 5:00 P.M.

**Identify the Population – Run the Query**

1. Navigate to: *Main Menu>My Queries*
   a. The upper right will indicate the total number of queries you have been given access to run. They are listed in alphabetical order.
2. Select PE_SR_G_BLANK_GSARI_MILESTONE from the list.
3. Click the Run button to open that query.
4. Enter your plan code in the Plan (Optional) field.
5. Click the View Results button. The results for your plan are displayed.
   a. The results have two parts.
      i. The left side is information on the student’s career program plan stack (CPPS)
         1. The plan in CPPS Plan is the same as what you’ve entered in the query prompt and means that this student is/was in your plan.
      ii. The right side is information from the student’s milestones (MLSTN)
         1. The plan in the Mlstn Plan field is blank and needs to be filled in on the Student Milestones page
6. You may export these results to an excel spreadsheet if desired.
7. You will need to run this query (identify the population) for each degree plan you manage.

There is a detailed tutorial on how to run queries in the LionPATH Help Library if more instruction is needed: https://tutorials.lionpath.psu.edu/Publishing%20Content/PlayerPackage/pst8/hemi/pst8_gateway.html?id=QUERY_VIER_SRCH&ctx=cs9pbr4&ctx=pt856pbr1&LangCD=ENG

**To Correct the Milestone**

1. Now that you have your population, navigate to: *Main Menu > Records and Enrollment > Enroll Students > Student Milestones*
2. Click the Correct History button at the bottom of the page.
   a. **Typically, we don’t use correct history unless there is an error.** We are correcting errant records. For normal data entry, the appropriate action is to NOT use Correct History, and just add a new effective dated row at the top of the page.
3. Enter the PSU ID of a student on your list and click the Search button.
   a. If the student is in one college, you will be taken directly to the milestone page.
   b. If the student is in multiple colleges, a of colleges will be displayed at the bottom of the page. Select the appropriate college for your plan. This opens the appropriate milestone page.
4. Use the arrows at the top of the page to navigate through each effective date (Step 1).
5. For each effective date at the top of the page, scroll through all the milestones that existed on Milestone Detail row (Step 2).
6. Locate any rows that are missing the Academic Plan on any milestone, **including** the GSARI milestone.

7. Click on the magnifying glass next to the Academic Plan field to pull up the list of plans that are on the student’s record and select the appropriate plan for this milestone.

8. **IMPORTANT:** If you chose to just enter the plan code instead of using the magnifying glass to identify the plan, **be sure you wait for the system to finish loading the plan before moving on.** (Wait for the processing icon to disappear from the upper right-hand corner.)

9. Once all the rows have been updated with the Academic Plan, click on the Save button at the bottom of the screen. All your changes on all rows are now saved.
10. Click on the Return to Search button
11. Repeat the process, steps #3-11 until all the students in your list have plans entered for all their milestones.
12. When you think you're done: Verify that you've captured all the plans for your populations by re-running the queries until there are no returned student records.

**Please note:** There will be an effort to update all the missing plans on all graduate milestones later this semester. Updating all the milestones on these records while you are here updating for the SARI conversion will save you from updating them again later.

THANK YOU!