PennWest UNIVERSITY

PennWest Workflow – Course Substitution

Purpose

This document provides step-by-step instructions for users on how to submit a Course Substitution using PennWest Workflow.

Table of Contents

1. Introduction

This guide is intended for functional users tasked with initiating a course substitution through PennWest Workflow. The PennWest Course Substitution workflow is used to request approval to substitute a required course with an alternative one that meets program requirements.

2. Overview of the Course Substitution Process

Key Participants:
- **Academic Advisor:** Generates and submits the initial Course Substitution Workflow
- **Assistant Chair/Chair:** First approval step and can make correction to the submission. Additionally, someone in this role can submit without having to approve their own submission.

- **Dean's Admin Assistant:** Revision and final changes before it routed to a dean for final approval.
- **Associate Dean/Dean:** Final approval step. The submission can still be altered at this point before going to the Office of the Registrar.
- **Office of Registrar:** Records approved substitutions in the student's academic record.

3. Accessing the Course Substitution Form

Advisor Entry Points:
- **Degree Works:** In Degree Works, a link to the form can be found under the "Links" menu. It is named "Course Substitution – Advisor Only"
- **PennWest Workflow:** When authenticated into PennWest Workflow, click the +Case button in the upper right, and then start "Course Substitution : Advisor Start"

Assistant Chair/Chair Entry Points:
- **PennWest Workflow:** When authenticated into PennWest Workflow, click the +Case button in the upper right, and then start "Student - Course Substitution : Assistant Chair Start" or "Student - Course Substitution : Assistant Chair Start" depending on your role.

4. CLAIM TASK and REASSIGNING (if needed)

Assuming that you are the correct person in the workflow, you would claim the task for yourself to complete. If the task is not supposed to be routed to you or was routed incorrectly due to an error in the submission process, you can Reassign the task to the correct person. For information about Reassigning a task, please refer to the PennWest Workflow Navigation training document.

5. Step-by-Step Instructions

Task 1: Filling Out Student Information – Advisor/Chair

1. Enter the **student ID** into the PWID field and click Lookup.
   - Verify that the information that populates on the form is correct for the student.

2. Select the appropriate type(s) of course substitutions you'd like to submit.

Type of Course Substitution:

☑ Course Substitution   ☐ Waiver

                               ☐ General Requirement

- **Course Substitution** is for one-to-one course substitutions. i.e. – PSYC 2003 for PSYC 2300
- **Waiver** is for requirement waivers. i.e. department wishes to waive a specific requirement, waive required minor, waiving First Year Seminar
- **General Requirements** is used for items that don't necessarily fit into the previous two – i.e. reducing hours required for an area, allowing more hours to count

3. Select the **degree program** for the **student**, not the course(s) being substituted.

Student Information:

Note: If any data appears wrong for student, please notify Office of the Registrar (registrar@pennwest.edu) of the discrepency. You can still submit this form. The fields are just for informative purposes.

Name: Apples Western Esq.   **PWID:** P11018342

Campus Email: gervais@pennwest.edu

* Program: * College:

Psychology - Major   Health Sci and Human Services

Please select the student's program that is relevent to this course substitution

Campus: Please select the College that is associated with the student's program. NOT the program of the course substitution being made

CA   * Department:

Current Overall GPA   Psychology, Counseling and Art Therapy

0   Please select the Department that is associated with the student's program. NOT the program of the course substitution being made

4. Select the **college** and the **department** for the **student**, not the course(s) being substituted.

5. For a "Course Substitution" type, enter the requirement on the left and the course being used to substitute it on the right. The form allows for up to 5 substitutions at a time.
   - Enter the justification for the substitution(s) in the field below.

Course Substitution Details:

Requirement Selection: **Substitution for Requirement:**

* Subject (Ex: CCIS)	* Number (Ex: 1200)	Course Title	* Subject (Ex: CCIS)	* Number (Ex: 1200)	Course Title
PSYC	3000	Advanced Psychology	PSYC	2600	Psychology for advanced le
Subject (Ex: CCIS)	Number (Ex: 1200)	Course Title	Subject (Ex: CCIS)	Number (Ex: 1200)	Course Title

* Justification for the Course Substitution

because I asked nicely!

Please include details for the course substitutions up to 2000 characters. If there is more than one substitution, please use this field for all.

SUBMIT FORM   Current User: Shayne Gervais

6. For a "Waiver" or "General Requirement" type, put as much information as possible in the free form text field that is displayed with the appropriate heading.
7. Submit the form.

Each task that is generated after the advisor or chair submits the initial form is for approval and error checking. The form can be edited by all users that see it after, but they should include what they've updated in the notes box for their role.

6. Confirmation and Tracking

Once submitted, anyone that participates in the form can view the case as it moves through each task under Open Cases in the PennWest Workflow dashboard. When it is complete, it can be viewed under the Completed Cases in the Dashboard.

TASK	PWID	REQUEST DATE:	#	STATUS	REQUEST	ASSIGNEE	COMPLETED
Course Substitution - Advisor Input	P11018342	-	23808	Completed	Student - Course Substitution	SG Shayne Gervais	09/20/2024 08:25

7. Troubleshooting and Support

If you encounter any issues during the submission process, please follow the steps for submitting an issue which are outlined in the PennWest Workflow Navigation training document. Please be sure to take note of the case number, the student's ID #, and any other relevant information so that it can be included in the ticket generated through the helpdesk system.