

# Student Groups Table of Contents

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**Notes:**

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## Student Groups

### Overview

This manual covers how to do the following in regards to student groups:

- Add
- Change
- Inactive
- Delete
- View

### What is a Student Group?

**A student group is usually used if we have no other way to identify a group/subset/cohort of students.** A student can be assigned to as many student groups as needed.

Student groups allow the University to “flag” a student for a variety of reasons: tuition, admissions or residence halls purposes, and/or to enforce enrollment on some courses, such as math class eligibility based on placement tests, or unit specified groups based on the student being in a specific student group.

### Sample of Student Group Codes

The student group codes you have access to place are found in the *Student Group* Look Up list on the Student Groups page.

Examples of student group codes are listed below:

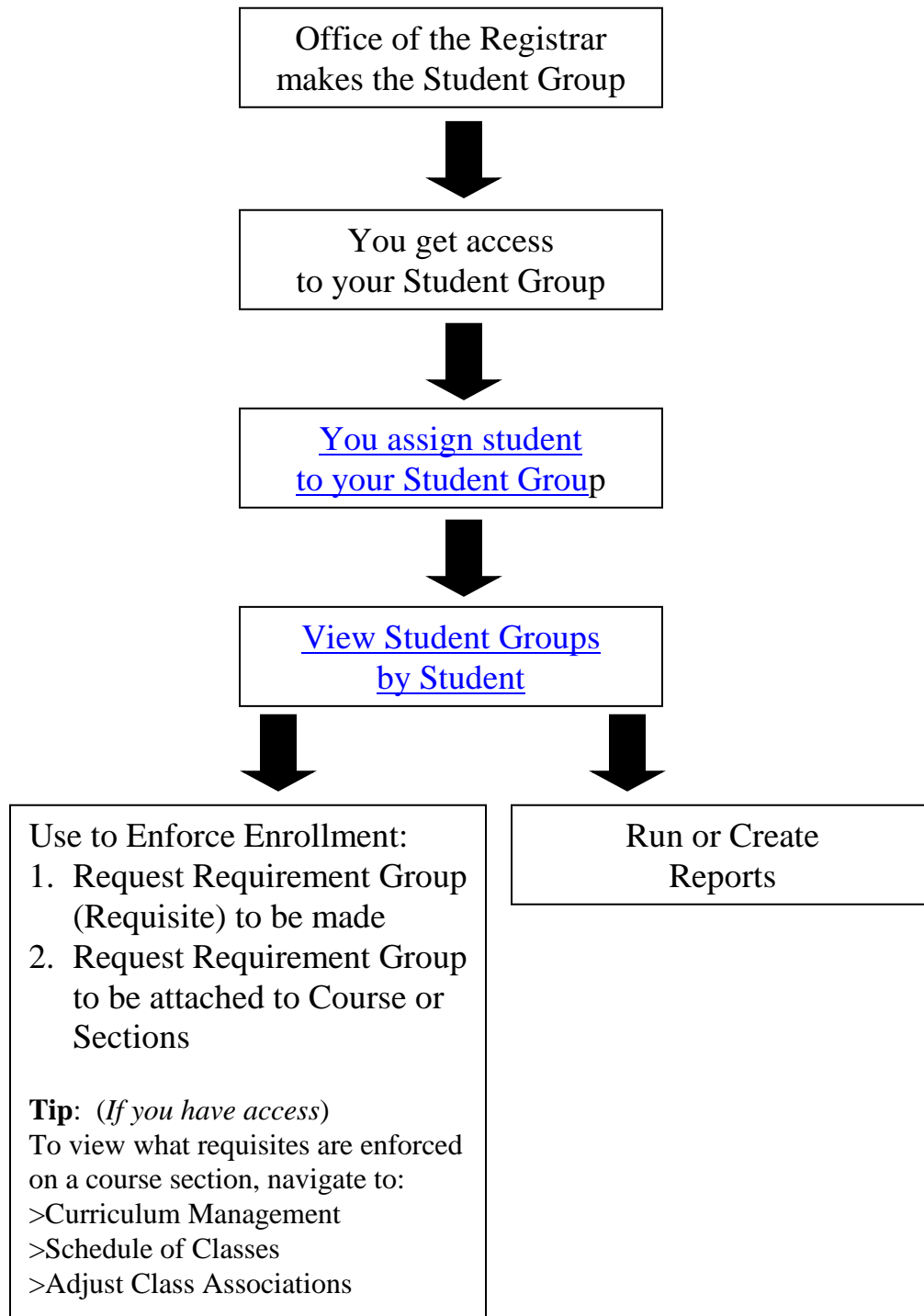
Student Group	Description
CAE	Center for Academic Excellence
CRC	Chadbourne Residents
C109	Chem 109 authorizations
M210	Math 210 auths
PEOP	PEOPLE Program

**Security Note:** You will be able to view ALL student groups attached to a student.

You will only be able to [add](#), [change](#), and/or [remove/inactivate](#) students within student groups to which you have security.

**Auto Delete Note:** Every March and October, the Office of the Registrar purges/deletes students from the enrollment-related student groups. The Registrar’s office sends out a warning email to Student Group ‘owners’ indicating that all students will be deleted from specified enrollment-related student groups. If you do not want an enrollment-related student group purged, reply back by the date specified in their email.


## Student Group Flow Chart



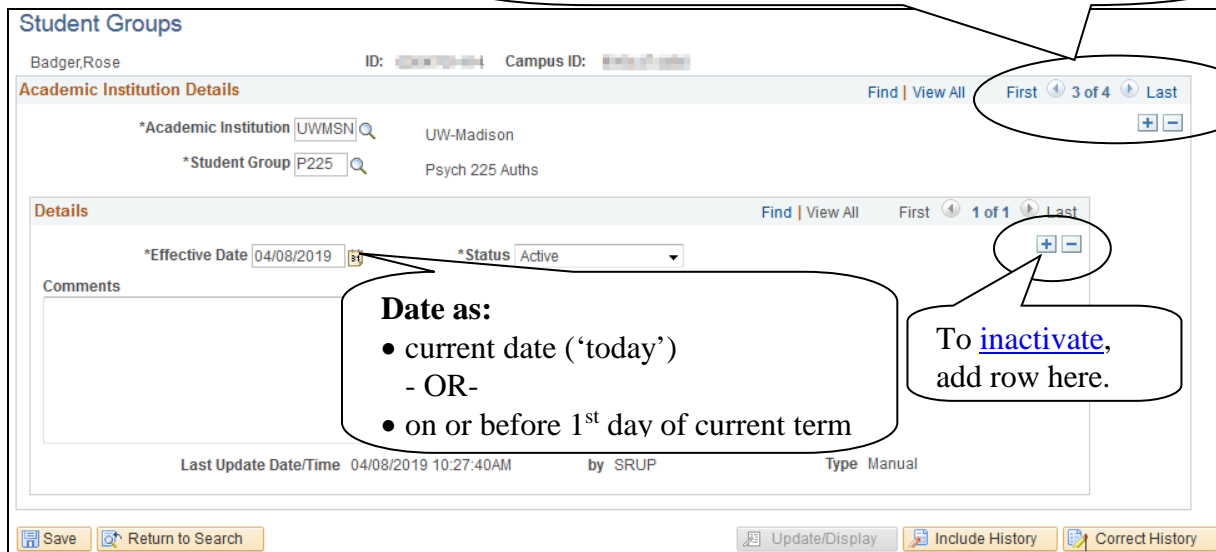
## Student Groups Page

The Student Groups page provides you the opportunity to [place](#) a student in a specific student group as well as add or update comments. You may also [delete](#) a student from a student group or make their student group status [inactive](#).

## Student Groups Page

**Path:** >Records and Enrollment >Career and Program Information >Student Groups  
-or-  Student Records WorkCenter, Student Groups

◆ Shows number of Student Groups a student is in.  
◆ Use upper + to [add](#) a new student group.



**Date as:**

- current date ('today')
- OR -
- on or before 1<sup>st</sup> day of current term



To [inactivate](#), add row here.





**Note:** You can view all student groups placed on a student's record; however, **your security access determines which student groups you have the ability to add, change, and delete.**

Grayed out records indicate student groups you cannot modify.

## Student Groups Page Field Descriptions

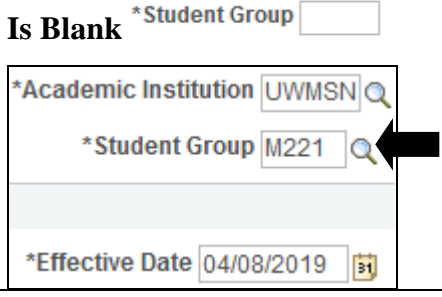
The table below describes the fields and buttons found on the Student Groups page:

Field or Button	Description						
<i>Academic Institution</i>	Name of our institution. Defaults to 'UWMSN' for UW-Madison.						
<i>Student Group</i>	Name of student group in which the student is a member.  Type in code or select Look up  button, select [Look Up] to view the student groups to which you have access & select.						
<i>Effective Date</i>	<p>Date this student group was activated or inactivated. Defaults to today's date after a <i>Student Group</i> is entered.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"><b>If adding a Student Group for:</b></td> <td style="width: 50%;"><b>Then Effective Date as:</b></td> </tr> <tr> <td>a Future Term</td> <td>Today's Date</td> </tr> <tr> <td>the Current Term</td> <td><b>On or Before the first day</b> of the current term</td> </tr> </table> <p><b>Tip:</b> The <i>Term Begin Date</i> can be found using this menu path: &gt;Records and Enrollment &gt;Dates and Deadlines &gt;Session Dates and Deadlines.</p> <p><b>Note:</b> The student will remain in this student group from this date forward until deleted or inactivated.</p> <p><b>Exception:</b> Enrollment-related student group members are purged by Registrar's Office just prior to the next priority enrollment period. (Email warnings are sent.)</p>	<b>If adding a Student Group for:</b>	<b>Then Effective Date as:</b>	a Future Term	Today's Date	the Current Term	<b>On or Before the first day</b> of the current term
<b>If adding a Student Group for:</b>	<b>Then Effective Date as:</b>						
a Future Term	Today's Date						
the Current Term	<b>On or Before the first day</b> of the current term						
<i>Status</i>	Status of this student group, 'Active' or 'Inactive'. <b>Note:</b> <b>Inactivate to maintain student group history:</b> <ol style="list-style-type: none"> <li>1. Add a new date row (lower  [+]) Add ).</li> <li>2. Change <i>Effective Date</i>.</li> <li>3. Change <i>Status</i> to 'Inactive' to inactivate a student from a student group.</li> <li>4. Select [Save].</li> </ol>						
<i>Comments</i>	Optional free-form text field available for further detail.						
<i>Last Update Date/Time</i>	Date and time of the last update to this record.						
<i>by</i>	SIS ID of last person to update this record.						
<i>Type</i>	Type of last update: manual or batch job name.						


Field or Button	Description
<p>[+] <b>Add</b></p>	<p>Select upper  [+] Add button located to the right of <i>Academic Institution</i> to add an additional student group to this student's record.</p> <p>Select lower  [+] Add button located to the right of <i>Status</i> to add an additional effective dated entry within the specified student group. (e.g. to make Status '<a href="#">inactive</a>')</p>
<p>[-] <b>Delete</b></p>	<p>Select <b>upper</b>  [-] Delete button located to the right of <i>Academic Institution</i> to <a href="#">delete</a> a student group from this student's record.</p> <p>Select <b>lower</b>  [-] Delete button located to the right of <i>Status</i> to delete a particular effective dated entry within the specified student group.</p>
<p>[Save]</p>	<p>Select [Save] to Save changes you have made to this record.</p>
<p>[Return to Search]</p>	<p>Select [Return to Search] to return to the Student Groups Find/Search Results page.</p>
<p>[Update/Display]</p>	<p>Select [Update/Display] to view all (past, current, future) student group information on a student's record.</p> <p><b>Note:</b> If this button is grayed out, this is your current mode.</p>
<p>[Include History]</p>	<p>Select [Include History] to view all (past, current, future) student group information on a student's record.</p> <p><b>Note:</b> If this button is grayed out, this is your current mode.</p>
<p>[Correct History]</p>	<p>Select [Correct History] to <a href="#">modify</a> student group information on a student's record.</p> <p><b>Note:</b> If this button is grayed out, this is your current mode.</p>

## Adding a Student to a Student Group

To add a student to a student group, follow the steps below:

Step	Action	Result
1.	Navigate to: >Records and Enrollment >Career and Program Information > <b>Student Groups</b>	The Find page displays.  <b>Tip: Student Groups</b> also available through <input type="checkbox"/> Student Records WorkCenter.
2.	Use the Find page to locate the student's record.	The student's information displays on the Student Groups page.
3.	Depending on the student's student group record, follow the proper steps below:	
	<b>If the <i>Student Group</i> field:</b>	<b>Then follow these steps:</b>
	<b>Is Filled In</b> Student Group XXXX	a. Select upper <input type="checkbox"/> [+] Add button to the right of <i>Academic Institution</i> . b. Follow the 'Is Blank' procedure below.
	<b>Is Blank</b> *Student Group <input type="text"/> 	Complete all the fields as advised in the " <a href="#">Student Groups Page Field Descriptions</a> " section. a. <i>Academic Institution</i> = UWMSN b. <i>Student Group</i> c. <i>Effective Date</i> *See Rules Below d. <i>Status</i>
4.	Select [Save].	The new student group is saved to the student's record.

<b>Rules for Effective Dating <u>Enrollment Based</u> Student Groups:</b>	
<b>If adding a Student Group for a:</b>	<b>Then <i>Effective Date</i> as:</b>
<b>Future Term</b>	Today's Date
<b>Current Term</b>	<b>On or before the first day of the current term</b>

**Tips:** The *Term Begin Date* can be found using this menu path:  >Records and Enrollment >Dates and Deadlines >Session Dates and Deadlines.

**Student Group data is not term specific.**

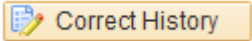




**Therefore, entry of the *Effective Date* with a date on or before the first day of the term is essential for course enrollment.**

A student must be added to the student group **before** the student is eligible to enroll for any course with a requisite that includes that student group.



## Changing a Student's Student Group

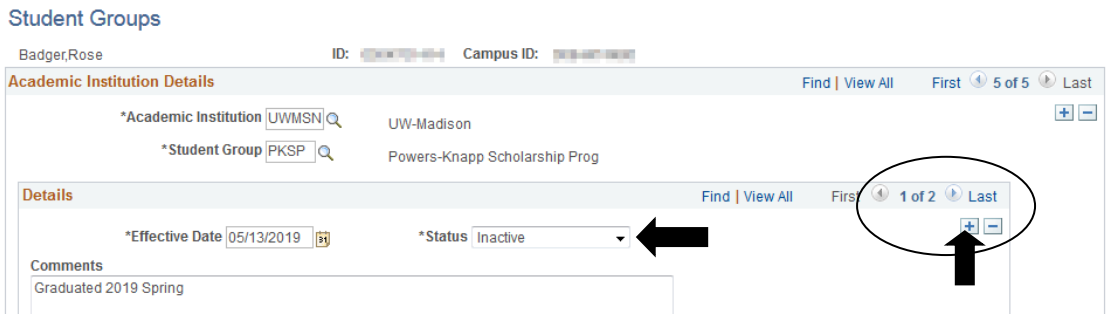
To change the details for a student's existing student group, follow the steps below:

Step	Action	Result
1.	<p>Navigate to the Student Groups page using the menu path of your choice:</p> <p>a. &gt;Records and Enrollment &gt;Career and Program Information &gt;<b>Student Groups</b> -or- <input type="checkbox"/> <b>Student Records WorkCenter, Student Groups</b> <b>Tip:</b> If you are already on the Student Groups page, select  [Correct History] and skip steps b &amp; c.</p> <p>b. <b>Check Correct History.</b> <input checked="" type="checkbox"/> Correct History</p> <p>c. Use the Find page to locate the student's record.</p> <p><b>-OR-</b></p> <p>a. &gt;Records and Enrollment &gt;Career and Program Information &gt;View Student Groups by Student</p> <p>b. Use the Find page to locate the Student Group you want to view.</p> <p>c. Select [Get Results].</p> <p>d. Find the student you need to change.</p> <p>e. Select their row's <u>Details</u> link.</p>	
2.	Find the specific student group you wish to change.	<b>Tip:</b> Use row counter bar to move around.
3.	Change the appropriate field(s) as advised in the " <a href="#">Student Groups Page Field Descriptions</a> " section.	<p>Fields display with changed data.</p> <p>*Academic Institution <input type="text" value="UWMSN"/>  UW-Madison</p> <p>*Student Group <input type="text" value="M221"/>  MATH 221 auths</p> <hr/> <p>*Effective Date <input type="text" value="04/08/2019"/>  *Status <input type="text" value="Active"/> </p>
4.	Select [Save] or [OK].	The student group change is saved to the student's record.

**Note:** When you change a student's student group information, any evidence of the previous student group information is removed from the system.

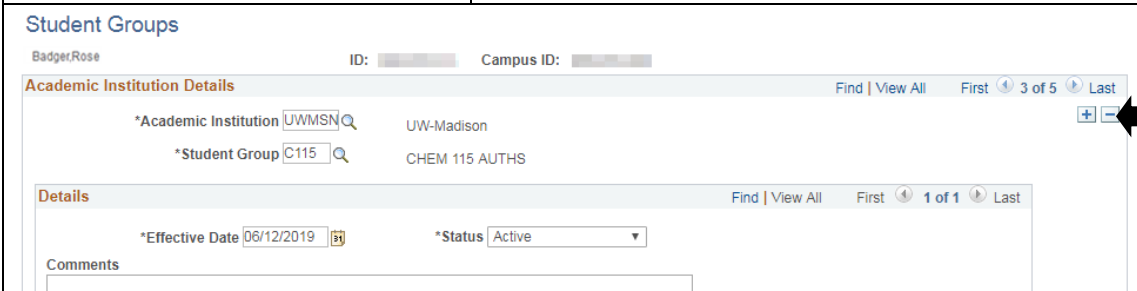
## Inactivating a Student from a Student Group

By inactivating a student from a student group, a record of their group association is kept. To inactive a student group from a student's record, follow the steps below:

Step	Action	Result														
1.	<p>Navigate to the Student Groups page using the menu path of your choice:</p> <table border="1"> <tr> <td>a.</td> <td>&gt;Records and Enrollment &gt;Career and Program Information &gt;<b>Student Groups</b> -or- <input type="checkbox"/> <b>Student Records WorkCenter, Student Groups</b></td> </tr> <tr> <td>b.</td> <td>Use the Find page to locate the student's record.</td> </tr> </table> <p><b>-OR-</b></p> <table border="1"> <tr> <td>a.</td> <td>&gt;Records and Enrollment &gt;Career and Program Information &gt;View Student Groups by Student</td> </tr> <tr> <td>b.</td> <td>Use the Find page to locate the Student Group you want to view.</td> </tr> <tr> <td>c.</td> <td>Select [Get Results].</td> </tr> <tr> <td>d.</td> <td>Find the student you need to change.</td> </tr> <tr> <td>e.</td> <td>Select their row's <u>Details</u> link.</td> </tr> </table>	a.	>Records and Enrollment >Career and Program Information > <b>Student Groups</b> -or- <input type="checkbox"/> <b>Student Records WorkCenter, Student Groups</b>	b.	Use the Find page to locate the student's record.	a.	>Records and Enrollment >Career and Program Information >View Student Groups by Student	b.	Use the Find page to locate the Student Group you want to view.	c.	Select [Get Results].	d.	Find the student you need to change.	e.	Select their row's <u>Details</u> link.	
a.	>Records and Enrollment >Career and Program Information > <b>Student Groups</b> -or- <input type="checkbox"/> <b>Student Records WorkCenter, Student Groups</b>															
b.	Use the Find page to locate the student's record.															
a.	>Records and Enrollment >Career and Program Information >View Student Groups by Student															
b.	Use the Find page to locate the Student Group you want to view.															
c.	Select [Get Results].															
d.	Find the student you need to change.															
e.	Select their row's <u>Details</u> link.															
2.	Find the specific student group you wish to make 'inactive'.	<p><b>Tip:</b> Use row counter bar to move around.</p> <p><b>Note:</b> Verify you are inactivating the correct student group!</p>														
3.	Select lower <input type="button" value="+"/> [+] Add button to the right of <i>Status</i> .	A new effective date row displays.														
4.	Change <i>Effective Date</i> if needed.	<i>Effective Date</i> displays date.														
5.	Change <i>Status</i> to 'Inactive'.	<i>Status</i> displays 'Inactive'.														
	 <p>The screenshot shows the 'Student Groups' page for a student named Badger, Rose. It displays 'Academic Institution Details' for UW-Madison and 'Powers-Knapp Scholarship Prog'. Below this, the 'Details' section shows the 'Effective Date' as 05/13/2019 and the 'Status' as 'Inactive'. A red arrow points to the 'Status' dropdown menu. Another red arrow points to the '+' button in the row counter bar, which is circled in red.</p>															
6.	If wanted, add or change <i>Comments</i> .	<b>Note:</b> If <i>Comments</i> were on the previous row, they copy to the new row.														
7.	Select [Save] or [OK].	The student is now 'inactive' in this student group.														

## Deleting a Student from a Student Group

By deleting a student from a student group, a record of their group association is removed. To delete a student group from a student's record, follow the steps below:

Step	Action	Result														
1.	<p>Navigate to the Student Groups page using the menu path of your choice:</p> <table border="1"> <tr> <td>a.</td> <td>&gt;Records and Enrollment &gt;Career and Program Information &gt;<b>Student Groups</b> -or- <input type="checkbox"/> <b>Student Records WorkCenter, Student Groups</b></td> </tr> <tr> <td>b.</td> <td>Use the Find page to locate the student's record.</td> </tr> </table> <p><b>-OR-</b></p> <table border="1"> <tr> <td>a.</td> <td>&gt;Records and Enrollment &gt;Career and Program Information &gt;View Student Groups by Student</td> </tr> <tr> <td>b.</td> <td>Use the Find page to locate the Student Group you want to view.</td> </tr> <tr> <td>c.</td> <td>Select [Get Results].</td> </tr> <tr> <td>d.</td> <td>Find the student you need to change.</td> </tr> <tr> <td>e.</td> <td>Select their row's <u>Details</u> link.</td> </tr> </table>	a.	>Records and Enrollment >Career and Program Information > <b>Student Groups</b> -or- <input type="checkbox"/> <b>Student Records WorkCenter, Student Groups</b>	b.	Use the Find page to locate the student's record.	a.	>Records and Enrollment >Career and Program Information >View Student Groups by Student	b.	Use the Find page to locate the Student Group you want to view.	c.	Select [Get Results].	d.	Find the student you need to change.	e.	Select their row's <u>Details</u> link.	
a.	>Records and Enrollment >Career and Program Information > <b>Student Groups</b> -or- <input type="checkbox"/> <b>Student Records WorkCenter, Student Groups</b>															
b.	Use the Find page to locate the student's record.															
a.	>Records and Enrollment >Career and Program Information >View Student Groups by Student															
b.	Use the Find page to locate the Student Group you want to view.															
c.	Select [Get Results].															
d.	Find the student you need to change.															
e.	Select their row's <u>Details</u> link.															
2.	Find the specific student group you wish to delete.	<p><b>Tip:</b> Use row counter bar to move around.</p> <p><b>Note:</b> Verify you are deleting the correct group.</p>														
3.	Select upper <input type="checkbox"/> [-] Delete button to the right of <i>Academic Institution</i> .	The message, "Delete current/selected rows from this page? The delete will occur when the transaction is saved." displays.														
																
4.	Select [OK] if you want to delete the student group.	<p>The student group information is removed from the student's record.</p> <p><b>Tip:</b> If you do not want to delete this item, select [Cancel] or do not save.</p>														
5.	Select [Save] or [OK].	The student group is permanently removed from the record.														

**Important:** For enrollment based student groups, see [Auto Delete Note](#) on bottom of page 1.

## Viewing All Student Group Members

To view all students in a particular student group, follow the steps below:

Step	Action	Result
1.	Navigate to: >Records and Enrollment >Career and Program Information >View Student Groups by Student	The Find page displays.
2.	Use the Find page to locate the <i>Student Group</i> you want to view.	The View Student Groups by Student page displays.
3.	If desired, change <i>Select Effective Dates</i> .	<b>All</b> rows for student inactive, active, future dated <b>Most Current (Any Status)</b> row inactive, active <b>Most Current Active</b> as of today <b>Most Current Inactive</b> as of today
4.	If a more limited list is desired, select <i>Range Selection</i> and fill in additional fields.	Additional fields display to narrow your list.
5.	Select [ <b>Get Results</b> ].	The results display on the View Student Groups by Student page.
6.	View the student group members.	-
7.	If you want to view the student's details, select <u>Details</u> & <b>find row</b> . <ul style="list-style-type: none"> <li>If you have rights to <a href="#">edit</a>, you can update and select [OK].</li> <li>If you have view only rights, select [Cancel] when done.</li> </ul>	Student Groups page displays.  <b>Tip:</b> To refresh your image after editing, select [Get Results].

## Reports

1. Use SIS >**Reporting Tools >Data Center** |Students| to get a quick ‘student group’ report.

Students | Courses

### Search on Active Students

(5000 class limit)  
[Link to Data Center reference document](#)  
This data may be protected by FERPA, read more.

Search Clear

career  level at beginning of current term

academic program  projected level for next term

academic plan contains  declared graduation term

primary acad group  graduation status

sub-plan  advised by

student group

cumulative GPA from  0.000 to   
low range high range

cumulative credits from  0 to   
low range high range

admit type

common negative service indicator

academic standing status

academic standing action

**NOTE:** These resources may need additional access using RADAR:  
<https://search.data.wisc.edu/radar.php> ‘Request Access’

2. Find Links to Student reports here: <https://data.wisc.edu/uwrap/>
3. General Reporting Resources: <https://data.wisc.edu/>
4. Tableau Link: <https://dataviz.wisc.edu>