Managing Advanced Standing and Study Plans for Outbound Exchange Students

More information about ISIS are available through the ISIS website at www.isis.unimelb.edu.au. For comprehensive ISIS User Assistance, log in to ISIS, click on the Help icon in the navigation panel, and browse the Contents tab or Search for the help topic you want.

What, Why, When?

This process should be used for students enrolled in a course of study at the University of Melbourne (UoM), who are undertaking a period of study at an overseas institution with which the University has an exchange partnership agreement. Outbound Exchange students continue to pay their standard tuition fees to the University of Melbourne, and are enrolled in generic “placeholder” Exchange subject/s within their UoM course.

Recording exchange is a three-part process:

**Part 1:** When the Exchange Application is approved, the Advanced Standing application is entered as a placeholder / reminder until Advanced Standing is granted to the student upon completion of Exchange study.

**Part 2:** The Exchange (EXCH) placeholder subject is added to the Study Plan, to identify that the student is going on Exchange.

**Part 3:** Once Advanced Standing for the completed exchange study is assessed, the placeholder subject is moved off plan, and the Advanced Standing is granted and applied to the Study Plan, or is Not Granted if appropriate.

**Warning:** This process relates to outbound Exchange enrolments and credit only, and does not apply to outbound Study Abroad or Cross-Institutional study. Please refer to separate Cheat Sheets for those processes.

Step-By-Step Instructions

**Part 1: Recording the placeholder Exchange Advanced Standing application**

When a student goes on exchange, they have made a prior agreement with their Faculty or Student Centre to receive Advanced Standing (credit) towards their University of Melbourne course for the subject/s completed overseas. This agreement can be recorded prior to the Exchange period in the Advanced Standing Application screen.

There are two types of Advanced Standing used to record studies completed on Exchange. These are:

**Exempt**

*Exempt* Advanced Standing is the equivalent of specified credit, where the student will receive an exemption from completing the equivalent University of Melbourne subject because there is a one-to-one match between the completed subject and the specified University of Melbourne subject, as identified in the Exchange Application Form.

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General

General Advanced Standing is the equivalent of unspecified credit, where the student will receive Advanced Standing towards their course, but there is no one-to-one match between the subjects they completed and a University of Melbourne subject, as identified in the Exchange Application Form.

Warning: Never apply General or Exempt Advanced Standing directly against the exchange placeholder subject itself. Instead, either apply General Advanced Standing against an option row, or grant Exempt Advanced Standing for a specific UoM subject on the student’s Study Plan, with a Basis of Exchange (instructions below).

1. Navigate to the Advanced Standing Application screen.
2. Complete the key fields using the first group search icon:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student ID</td>
<td>The identification number of the student.</td>
</tr>
<tr>
<td>Study Package Cd</td>
<td>The course code.</td>
</tr>
<tr>
<td>Ver</td>
<td>The version number of course.</td>
</tr>
<tr>
<td>Att</td>
<td>The student’s attempt number for that course and version.</td>
</tr>
</tbody>
</table>

Note: Leave Adv Standing Appn field blank. This number will auto-generate when the application is saved.

3. Complete the following fields in the General Details section:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Notes</td>
<td>Enter notes regarding the exchange Advanced Standing application, e.g. “For exchange studies completed at &lt;insert name of host institution&gt;”.</td>
</tr>
<tr>
<td>Application Date</td>
<td>Leave default value or amend as required. Defaults to today’s date.</td>
</tr>
</tbody>
</table>
Application Status

Select Unassessed. If waiting for the student to return from Exchange, the status may be set to Pending. This automatically updates to Assessed when Outcome is entered.

Where to next?

- For Exempt Advanced Standing, proceed to step 4
- For General Advanced Standing, proceed to step 5

4. For Exempt Advanced Standing, complete the following information in the Advanced Standing Outcomes section:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basis</td>
<td>Select Exchange as the basis for credit.</td>
</tr>
<tr>
<td>Warning:</td>
<td>If entering a Basis of Exchange you must enter an External Organisation code in the Ext Org field further along in the grid.</td>
</tr>
<tr>
<td>Adv Type</td>
<td>Advanced Standing type. Select Exempt.</td>
</tr>
<tr>
<td>Operand</td>
<td>Leave default of ‘=’ (equals) value.</td>
</tr>
<tr>
<td>Spk Cd 1</td>
<td>Enter the UoM subject code against which the Advanced Standing is to be applied.</td>
</tr>
<tr>
<td>Warning:</td>
<td>Do not enter the exchange placeholder subject code against an Exempt Advanced Standing application. The subject entered here must be the equivalent UoM subject for which the student will be granted Advanced Standing as a result of their Exchange study.</td>
</tr>
<tr>
<td>Tip:</td>
<td>To search for the subject details, click on Att search icon to bring up Student Study Package Search screen.</td>
</tr>
<tr>
<td>Ver</td>
<td>Enter subject version number. This must match the Version number on the student’s Study Plan.</td>
</tr>
<tr>
<td>Att</td>
<td>Enter subject attempt number. This must match the Attempt number on the student’s Study Plan.</td>
</tr>
<tr>
<td>Value</td>
<td>Credit point value will default from the subject’s credit point value.</td>
</tr>
<tr>
<td>Outcome</td>
<td>Leave blank. This will be updated when the student returns from Exchange.</td>
</tr>
<tr>
<td>Ext Org</td>
<td>Enter or search for the appropriate External Organisation code – this is the host institution at which the Exchange study will be / has been undertaken. External Org Title will default when code is entered.</td>
</tr>
<tr>
<td>Notes</td>
<td>Optionally enter additional notes regarding the application.</td>
</tr>
</tbody>
</table>
5. For General Advanced Standing, complete the following information in the Advanced Standing Outcomes section:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basis</td>
<td>Select Exchange as the basis for Advanced Standing.</td>
</tr>
<tr>
<td>Warning:</td>
<td>If entering a Basis of Exchange you must enter an External Organisation code in the Ext Org field further along in the grid.</td>
</tr>
<tr>
<td>Adv Type</td>
<td>Advanced Standing type. Select General.</td>
</tr>
<tr>
<td>Operand</td>
<td>Leave default of '=' (equals) value.</td>
</tr>
<tr>
<td>Spk Cd 1</td>
<td>Enter the course code against which Advanced Standing is to be applied.</td>
</tr>
<tr>
<td>Tip:</td>
<td>To search for the course details, click on Att search icon to bring up Student Study Package Search screen.</td>
</tr>
<tr>
<td>Ver</td>
<td>Enter course version number. This must match the Version number on the student’s Study Plan.</td>
</tr>
<tr>
<td>Att</td>
<td>Enter course attempt number. This must match the Attempt number on the student’s Study Plan.</td>
</tr>
<tr>
<td>Tip:</td>
<td>Use the search icon this field to access the Student Study Package Search screen to search for course details</td>
</tr>
<tr>
<td>Value</td>
<td>Enter the credit point value of Advanced Standing that the Exchange study will be worth (e.g. 12.5 credit points).</td>
</tr>
<tr>
<td>Outcome</td>
<td>Leave blank. This will be updated when the student returns from Exchange.</td>
</tr>
<tr>
<td>Ext Org</td>
<td>Enter or search for the appropriate External Organisation code – this is the host institution at which the Exchange study will be / has been undertaken.</td>
</tr>
<tr>
<td>Notes</td>
<td>Optionally enter additional notes regarding the application.</td>
</tr>
</tbody>
</table>

6. Click Save.

Note: Recording details of the approved Exchange Study Plan here will allow you to manage the Exchange Advanced Standing application within ISIS. See Part 3 for information on assessing the application once the student has returned.

Part 2: Adding Exchange placeholder subject/s to the Study Plan

Each discipline cluster has its own group of generic Exchange subjects, with each subject code set up with a specific credit-point value (ranging from 6.25 to 50 points, in multiples of 6.25 points).

Example: The Arts cluster has the following subjects available:

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Want more info? Subject codes can be found on the Melbourne Global Mobility (MGM) website: [http://www.mobility.unimelb.edu.au/staff/isis-subjects/isis-exsubjects1.html](http://www.mobility.unimelb.edu.au/staff/isis-subjects/isis-exsubjects1.html)

Alternatively, subject codes can be found via the **Study Package Search screen**. For example:

1. Navigate to the **Study Plan** screen.
2. Retrieve the relevant student’s details by completing the key fields and clicking **Retrieve**.

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**Field** | **Description**
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| Student Id | The identification number of the student. Student name and address will default beside field. |
| Study Package Cd | The course code. The course title will default. |
| Ver | Version number of course. |
| Att | The student’s attempt number for that course and version. |

3. Click **Add SSP** in the **Actions to Perform** task pane:

**Note:** Users must have Enrolment 4 access or higher in order to access the **Add SSP** link.

A semi empty grid row will appear at the bottom of the **Study Plan** grid with some fields pre-populated with default values from the course.

4. Enter the subject code for the appropriate Exchange subject (e.g. EXCH00008) in the **Spk Cd** grid field in the blank grid line, or search for the subject using the search icon.

5. Example of search:

6. Example of entering subject code directly into **Spk Cd** field:
Ver, Att, Study Package Title (subject title) and Credits value will default with an **SSP Status** of Planned and a component type of Core.

7. **Update Study Mode to Mobility Out**

8. **Select Enrolment Approved from the New Approval dropdown menu in the Actions to Perform on Save task pane.**

9. **Click Save.**

Warning List message box displays with message.

10. **Click OK.**

**Note:** The student will need to be enrolled in one subject per semester of exchange, each with the credit value of the study they are expected to undertake during that semester. Therefore, if a student is undertaking exchange over two semesters, and undertaking a 50-point load for each semester, there will need to be TWO attempts of the same subject on the Study Plan, one for each semester.

**Part 3: Granting Advanced Standing for Exchange**

When the student returns from Exchange, the host institution will forward a copy of the student’s transcript to MGM. MGM will then forward a copy of the transcript to the relevant Exchange Advisor/s, so that the appropriate credit/Advanced Standing can be granted.

**Warning:** Ensure that the exchange placeholder subject has been moved off the student’s Study Plan (in the Study Plan Structure screen) before entering Advanced Standing Outcome/s.

**Note:** Exchange subjects converted from Merlin will need to have a result of “NA” (= Not Assessed) against the EXCH subject before being taken off plan.

**Want more info?** For instructions on how on how to enter a NA result (for exchange enrolments converting from Merlin) refer to ISIS online help topic ‘Enter results for an individual student’ in the Results User guide.

**Note:** Exchange placeholder subjects with ISIS Study Package Codes (i.e. EXCHXXXXX) can simply be dragged off plan when completed. The **SSP Status** of these subjects will be
automatically set to *Passed* via a bulk job once the availability end date has passed, and can then be moved off plan.

**Want more info?** For instructions on how to move the exchange subject (either Merlin converted or new ISIS exchange subject) off plan refer to ISIS online help topic ‘Take an SSP (subject) attempt off plan’ in the Enrolments chapter of User Assistance.

**Note:** If a student has completed different subjects from those agreed upon in the Exchange Application, then the outcome of the credit application might need to be re-assessed. For example, the student might be granted more *General* Advanced Standing and less *Exempt* Advanced Standing (or vice versa), or a different total amount of credit points from the amount originally expected.

**Note:** If a subject on the student’s proposed Exchange Study Plan has been failed, the Advanced Standing should not be granted for this subject, but the placeholder subject must still be moved off-plan.

1. Retrieve the student’s Advanced Standing application (created in **Part 1**, above) in the **Advanced Standing Application** screen.
2. If required, change the credit points in the **Value** column of the **Advanced Standing Outcomes** section, or add additional rows, if necessary (i.e. if the Advanced Standing being granted is different from that originally agreed upon).
3. Select an **Outcome** of **Granted** for all relevant rows on the grid.

**Note:** Tick the **Not Auto** checkbox for any **General** Advanced Standing granted, as this will allow you to manually apply the Advanced Standing to the appropriate components on the Study Plan.

**Warning:** Do **NOT** grant **Exempt** Advanced Standing for the EXCH subject itself, as this is an unassessed placeholder subject which must be removed from the **Study Plan** when the Exchange is complete. **ISIS will prevent course completions from being approved if an STDY placeholder subject remains on the Study Plan.**

**Warning:** **Exempt** Advanced Standing should only be applied where there is an assessed and agreed one-to-one match between the subject completed on Exchange and a University of Melbourne subject (as identified in Study Plan section of the Exchange Application Form). If there is no assessed and agreed match, the Advanced Standing type should be recorded as **General**.

4. **Click Save**

   The **Application Status** (previously **Unassessed or Pending**) automatically updates to **Assessed** and the **Application Total Granted** field shows the total value of the credit granted.

5. Navigate to the **Study Plan** screen, to apply **General** Advanced Standing, or to check that **Exempt** Advanced Standing has been correctly applied.

**Note:** **Applied** and **Unapplied** Advanced Standing credit point totals can be seen in the **Credit Summary** section of the **Study Plan** screen.

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If Exempt Advanced Standing has been granted, this will automatically be applied to the relevant subjects when the subjects are added to the Study Plan. The SSP Status of the subject/s will automatically become Exempt.

**Example:** Exempt Advanced Standing in Study Plan:

Any General Advanced Standing granted will need to be manually applied to the relevant Option row on the Study Plan, as follows:

6. Retrieve the Study Plan by completing the key fields and clicking Retrieve.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Id</td>
<td>The identification number of the student. Student name and address will default beside field.</td>
</tr>
<tr>
<td>Study Package Cd</td>
<td>The course code. The course title will default.</td>
</tr>
<tr>
<td>Ver</td>
<td>The version number of the course.</td>
</tr>
<tr>
<td>Att</td>
<td>The student’s attempt number for that course and version.</td>
</tr>
</tbody>
</table>

7. Select the relevant Option row to which the General Advanced Standing is to be applied:

The selected row is then highlighted in blue, and the Apply/Unapply Advanced Standing link becomes available.

8. Click Apply/Unapply Advanced Standing.

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The **Apply/Unapply Advanced Standing** window opens.

**Note:** If the amount to be applied to the selected Option row is less than the total amount granted (e.g. if the General Advanced Standing is to be partially applied to multiple components of the student’s course), this can be changed in the **Value** field of the grid.

9. Tick the checkbox to select the *General* Advanced Standing credit row to be applied.

   ![Apply/Unapply Advanced Standing window](image)

   The **Apply** link becomes available.

10. Click **Apply**.

   ![Apply/Unapply Advanced Standing window](image)

   The **SSP Status** for the selected Option row will update to **Advanced Standing**.

11. Select **Enrolment Approved** from the **Actions to Perform on Save** task pane.

12. Click **Save**.

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[www.isis.unimelb.edu.au](http://www.isis.unimelb.edu.au)
13. Click **OK**.