PREP-API User Manual
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OVERVIEW OF PREP-API

In an effort to modernize data storage, improve data accuracy, and provide efficient web-based tools, UNC General Administration has created the PREP-API interface and underlying database. The purpose of this manual is to assist users of PREP and/or the API.

The Program Request Portal (PREP) facilitates the review and approval process for new degree programs. UNC institutions can use PREP for the following:

- Request a new priority degree program
- Submit a Request to Plan
- Submit a Request to Establish
- Submit responses to questions from UNC General Administration
- Visit a log of all documents, comments and actions related to a new degree request.

The Academic Program Inventory (API) is the official record of existing and approved degree programs. UNC institutions can use the API for the following:

- Search approved programs across all UNC institutions
- View detailed information on your institution’s approved programs
- Request changes such as to CIP code, title, degree awarded, and teacher licensure specialty area codes
- Submit a Request to Deliver to add a new delivery mode to an existing program

Because PREP and API have slightly different functionalities, there are different roles and permissions in each tool. Key functions associated with these roles are explained within this manual. PREP users may have multiple roles, such as CPC and Graduate Council. Users with multiple roles may see some additional icons or options that align with their various permissions and that are unavailable to other users.

All campus staff with a campus login already have basic access to PREP and the API and do not need to request it. For those who need a higher level of access than view only, contact the UNC GA Associate Vice President for Academic Programs.

<table>
<thead>
<tr>
<th>User</th>
<th>PREP: View Program Log</th>
<th>API: View Program Details</th>
<th>PREP: Upload Proposal Documents</th>
<th>PREP: Submit Reviews for Undergraduate</th>
<th>PREP: Submit Reviews for Graduate</th>
<th>API: Submit Requests to Deliver</th>
<th>API: Submit Requests</th>
<th>PREP: Receive Notifications</th>
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<tr>
<td>Campus Program Coordinator (CPC)</td>
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<td>Y</td>
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<td>Y</td>
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<td>Y</td>
<td>N</td>
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<td>N</td>
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</tr>
<tr>
<td>All Faculty/ Staff</td>
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<td>Y</td>
<td>N</td>
<td>Y</td>
<td>N</td>
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<td>N</td>
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</tr>
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</table>
PROGRAM REQUEST PORTAL (PREP)

PREP displays the status of all proposed degree programs under active review by UNC General Administration. UNC Regulation 400.1.1[R] governs the approval processes for all new baccalaureate, master’s and doctoral degree programs in UNC. The purpose of PREP is to organize and track all requests and communications relating to the process of applying for a new degree program.

Log In

Enter prep.northcarolina.edu. The public facing page displays each UNC institution’s program requests that are either “In Process or “Pending”.

To log in as a Campus Program Coordinator (CPC) or Administrator, select the blue “Log In” link at the top right of the screen.

Log In

Upon selecting Log In, you will be directed to select your home institution on the left side of the screen.

Once you select your institution, click the “Login through your campus” button on the right side of the screen.

Next PREP will direct you to enter your campus user ID and password.
**View PREP Summary Screen**

PREP keeps track of all actions taken on a particular proposal, when, and by whom. It reflects the current status of a proposal in the review process and allows access to all historical documents related to a proposal. PREP also allows the CPC and UNC General Administration to add or exchange comments as needed.

A summary screen provides access to the history log, document log, and comments for each proposal under review. To view this screen for any proposal, select the work wheel icon under the “Actions” column.

Once the work wheel has been selected, it will expand to show a magnifying glass. Select the magnifying glass to open the summary screen.

The summary screen has four main sections: status bar, file repository, History/Log, and Comments.

The document log shows all files that have been uploaded during the program request work flow. Each file is marked with a time stamp and date of upload.

The History/Log is a record of all actions that have taken place and the current status of the proposal under review.
Campus Program Coordinator (CPC) Functionality

Each campus has 1-2 designated Campus Program Coordinators (CPCs) who, on behalf of their Chancellor and/or Chief Academic Officer, are responsible for coordinating all communication between their campus and UNC GA related to program approval through PREP. This section of the manual addresses functionality that is specific to the CPC.

REQUEST NEW PRIORITY PROGRAM

Upon login to PREP, the default tab is the PREP screen. At this screen, the CPC can click the “Request New Program” button at the top right of the screen to request a new priority program.

Once “Request New Program” has been selected, the “Add New Program Request” screen will appear. Here the CPC will enter in key program details and delivery method information.
To add an on campus or online delivery method, select the “Add On Campus Method” or “Add Online Method” buttons under “Delivery Methods”. You will be prompted to enter the maximum percent that the program is typically offered through that delivery type.

To add an off-site delivery method, select the “Add Off-Site Method” button. You will be prompted to enter the maximum percent offered, proposed term to enroll students, name of site, address, city, zip/post code, and country.

Multiple sites for the same program can be submitted by selecting “Add Another Site.” Once all the information for the new program request has been entered, select the “Submit to GA” button at the bottom right of the screen.
REQUESTING JOINT PROGRAMS

At the “Add New Program” screen, the CPC has the option to select a “Single” or “Joint Degree Program”.

Selecting “Joint” requires choosing one or more UNC “Partner Campuses” for three joint degree program.

WITHDRAW REQUEST FOR A NEW PRIORITY PROGRAM

CPCs can withdraw a request for a new priority program at any time. There are two ways to access the Withdraw selection. One way is to click on the action wheel for the program.

Second, selecting the “Submit” button to send a document for review also provides the CPC the opportunity to withdraw as an alternative action. The button is on the right of the screen.
**UPLOAD A DOCUMENT – REQUEST TO PLAN (FORMERLY APPENDIX A)**

After the GA administrator pre-approves a program as a new priority, the CPC can upload a Request to Plan

1. Select *RequestSubmission* in the drop-down box.
2. Click the *Upload* icon. Only a single PDF document is allowed for upload. Once the document is uploaded, the screen will display “Complete.”

**UPLOAD A DOCUMENT - RESPONSE**

The CPC can upload response documents when Request to Plan or Establish revisions are not necessary but campuses need to submit substantive responses to questions from GA.

1. Select *Response to GA* in the drop-down box.
2. Click the *Upload* icon. Only a single PDF document is allowed for upload. Once the document is uploaded, the screen will display “Complete.”
**ADDING SUBSCRIBERS**

Subscribers are individuals who should be informed as the proposal moves through the program review and approval process in PREP (program director, dean, etc.). Subscribers added by the CPC will receive email notifications at each status change.

PREP allows the CPC to add subscribers anytime they are prompted to upload a document (Request to Plan, Request to Establish, Feedback from External Reviews, Campus Response to External Reviews).

1. To add subscribers, enter each email address of the subscriber separated by commas.

```
Sociology
Lead Campus: North Carolina Central University
Status: UG Request to Plan, Pending Submission
```

Enter email addresses of individuals who should receive automatic notifications regarding status of this proposal (separated by commas)

![Submit Button]

**RETRACT A PRIORITY PROGRAM**

The CPC can only retract a priority program at Request to Plan Pending Pre-Approval, and Request to Plan Pending Acknowledgement states. After these states, the “Withdraw” option is available to remove a proposal under review from consideration.

1. To retract a priority request, select the action icon to the right of the screen to remove it from the GA administrator’s archive.
2. Once a program is retracted it will remain in the CPC’s archive.

![Retract Button]
REQUEST AN EXTENSION

In order to request an extension to a revision period:

1. Select the work wheel icon in the action window to Request an Extension.
2. At the Request Extension screen, enter all extension attributes. Select Submit at the bottom to send the extension request to the GA administrator.
ADD COMMENTS

1. The CPC can add a comment by selecting the program and opening the summary screen.
2. The system provides a text field to enter comments.
3. After entering all comments, click Add comment to save the comments.
EDIT OR DELETE COMMENTS

1. CPCs can edit their own comments by clicking on the paper/pencil icon.
2. CPCs can delete their own comments by clicking on the red “x” icon.
**APPROVED PROGRAM INVENTORY (API)**

The UNC Academic Program Inventory is a searchable database of all approved degree programs in UNC and their approved modes of delivery (online, off-campus, etc.). In the API are degree programs that have been approved by the UNC Board of Governors as well as certificates that are subject to campus review procedures and then reported to UNC GA when approved. The API exists in two forms in order to meet the varying needs of different audiences, but the data is both sources is the same:

1. **Degree Finder** - The Degree Finder is a public-facing tool for searching for current campus program offerings. Degree Finder does not include information about discontinued programs. Degree Finder contains both Board approved degrees and campus approved certificates. The audience for this tool is wide and includes the public, UNC faculty and staff, and UNC General Administration. The Degree Finder is available at the following URL: [http://www.northcarolina.edu/apps/programs/index.php](http://www.northcarolina.edu/apps/programs/index.php)

2. **API (from PREP-API)** - The API is part of the PREP-API web application. The API contains information about both discontinued and active Board approved degree programs, as well as information about active campus approved certificate programs. This version of the API requires a campus log-in (Shibboleth log-in) in order to access. A campus login is required because the detailed information in the API is not useful to or might be confusing to the public (e.g. discontinued programs, program IDs). The API is available at the following URL: [https://prep.northcarolina.edu/arp/api/index.php](https://prep.northcarolina.edu/arp/api/index.php)

**Log In**

In order to access the API, go to the URL: [https://prep.northcarolina.edu](https://prep.northcarolina.edu)

Then click on the API Tab.
The following message will appear. Clicking on the first link will prompt you to log in to the API. Clicking the second link will take you to the public Degree Finder.

<table>
<thead>
<tr>
<th>Approved Program Inventory Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Academic Program Inventory (API) is the official record of degree programs offered by the sixteen constituent universities of the University of North Carolina.</td>
</tr>
<tr>
<td>Click here if you are a UNC institution requesting a change to a degree program in the API.</td>
</tr>
<tr>
<td>Click here if you are a prospective student or visitor interested in finding degree programs offered by UNC institutions.</td>
</tr>
</tbody>
</table>

UNC personnel who select the first link will be prompted to log in. Select your campus from the list on the left.

🔗 LOGIN

Choose your Campus / Institution:

- Appalachian State University
- East Carolina University
- Elizabeth City State University
- Fayetteville State University
- NC Agricultural and Technical State University
- North Carolina Central University
- NC State University
- UNCAgricultural and Technical State University
- UNCCentral University
- UNC Chapel Hill
- UNC Charlotte
- UNC General Administration
- UNC Greensboro
- UNC Pembroke
- UNC Wilmington
- UNC School of the Arts
- UNC-TV
- Western Carolina University
- Winston-Salem State University
- North Carolina School of Science and Mathematics
- I don't have a UNC System Campus!
Then click “Login through your campus” on the right.

You will be prompted to enter your campus credentials. The user ID and password will be the same as what you use to log in to your campus computer. Then click “Sign In.” (Note: Your screen may look different than the image below.)
**Home Page**

Regardless of the level of API access, the home page of the API will look basically the same for all users. The home page displays all active and discontinued BOG approved programs and all active campus-approved certificates.

![Home Page Screenshot]

**FILTERING**

Filters on the left can be used to limit the programs that show in the grid to the right. You can use one or a combination of the filters.

For example, if you would like to search for all joint programs that are offered online, you would choose “Online” from the first filter and then “Joint” from the second, as shown below, and press then “Search.”

![Filtering Screenshot]

For the “CIP Search” please be aware that you will need to enter the 6-digit CIP code without the period after the first two digits:

**Yes**

260101

**No**

26.0101

When you have entered all of the search criteria that you would like, click “Search.” If you would like to clear all of the filters and either see all of the programs in the list again or start a new search click “Clear.”
In order to view additional details about a program, click on the magnifying glass in the “Actions” column on the far right side of the grid. (Note: Depending on the dimensions of your computer screen and resolution settings you may have to scroll right to see the magnifying glass.)

Additional information about the program will appear on the screen. There are several additional pieces of information about the program here that are not available in the main grid, such as address information for off-site program locations and program discontinuation dates (if it was discontinued).
CPC and API CPC Functionality

Campus program coordinators (CPCs) and API campus program coordinators have additional permissions in the API. Mainly, they can request program modifications and discontinuations on behalf of their campus and only for the programs that their campus offers.

Making Modification Requests

Instead of a magnifying glass, the CPC and API CPC will see a work wheel on the right side of their list of programs. Clicking on the work wheel brings up a box that shows all actions available to the CPC/API CPC. Click “View” to see more information about the program. Click “Edit” to submit a change request.

When “Edit” is clicked, the following screen appears. At the top is some general information about the program that you selected to edit. Refer to this information to confirm that you have selected the right program or, if interrupted, to remind you of the program.

Click the highlighted dropdown arrow beside Reason for Modification to see the list of categories of modification requests. The red X in the upper right corner can be used to exit this or any screen at any time without saving.

Choose from the following list of modifications. All of the change options have a very similar process except for “Add/Modify Delivery” and “Add/Modify Specialty Area Code.” For that reason, this section will go through three examples: 1. CIP Change 2. Delivery Type Change and 3. Specialty Area Code Change.
CIP Change Request Example

This example follows the pattern of most of the change request categories where the current value is given, the new value is requested, a justification and upload are requested, and the CPC confirms approval of the Chancellor for the change. This same process is applied for the following types of change requests:

- CIP Change
- Title Change
- Degree Change
- Minimum Credential Credit Hours
- Expected Number of Full-Time Terms to Completion
- Effective Term
- Non-Terminal Master’s Flag

If “CIP Change” is chosen from the dropdown, the following screen will appear.

![Image of CIP Change Request Form]

The requestor is required to provide the new CIP that is being requested, a justification of no more than 500 characters, and certification that the Chancellor has approved the change request. Uploading a PDF with additional documentation of the reason for the request is encouraged, especially if the change is significant, but is not required in all cases. Once all information is provided, click “Submit.”
**Add Delivery Request Example**

To add a delivery type, select Add/Modify Delivery as the Reason for Modification. A box will appear showing the current delivery modes. To request a new delivery mode, click the arrow on the dropdown, select the mode you want to add, and then click “Add”

If off-site is chosen, the following screen will appear. Fill in all of the required information including the address, upload a PDF of the Request to Deliver, and then click “Submit.” Online and on-campus are similar but they do not have any of the location/address information.
Modify Delivery Request Example

In order to modify or discontinue a delivery type, click the work wheel on the row of the delivery type (after you have already chosen “Add/Modify Delivery” from the main modification window for the program). Then click “Edit.”

The following screen will then appear. The only things that you can modify related to a delivery type is the maximum percent offered per that delivery and the proposed term to enroll students.

If any of the location information needs to be changed, that would constitute a new off-site location. When adding a new off-site location, you may also need to request discontinuation of an existing site.

After filling in the required information click “Update Delivery.”
Discontinue Delivery Request Example

In order to delete or discontinue a delivery type, click the work wheel on the row of the delivery type. Then click on “Delete.”

The following screen will then appear. Fill out the required information, upload the Request to Discontinue form, and then click “Update Delivery.”
Add/ Modify Specialty Area Code Request Example

The addition and removal of specialty area codes can be done within the same step. When “Add/ Modify Specialty Area Code” is selected, the following screen will appear.

In order to remove specialty area codes, use the checkboxes for the list on the left to select the codes that you would like to remove. Then click “Remove.”

In order to add specialty area codes, use the checkboxes for the list on the right to select the codes that you would like to add. Then click “Add.”

When you have finished adding and removing any specialty area codes desired, click “Submit.”
VIEWING AND MANAGING PENDING MODIFICATION REQUESTS

In order to view modification requests and manage communications with UNC GA regarding these requests, click on the work wheel for the program with pending modifications. Then click on “Requests.”

View Change Request

Clicking “Requests” will take you to the list of pending change requests for that program. Click on the magnifying glass to view additional information about change requests and see any uploaded documents.

Review Change Request

If UNC GA has approved or denied the change request then it will disappear from this list and show up in the main program view page (see the previous View section), which contains a list of all program changes that have been concluded and their status (approved or denied).

Respond to UNC GA Comment on Change Request

If UNC GA has a question or requires additional information about the program, they will leave a comment on the program request for campus response. An email notification will be sent. When a campus response is needed, an exclamation point appears next to the work wheel, as highlighted below.

To respond to the UNC GA request, click on the work wheel and go to “Requests.”

There will be a work wheel next to any requests that are pending action from the CPC.

Review Change Request

Clicking on the work wheel will bring up the full information about the change request complete with any communications from UNC GA. In order to see the contents of the message from UNC GA, click on the talk bubble in the history/communications log and the message will appear.
Scroll down to see the information originally submitted. Edit that information or upload a new PDF to respond to the UNC GA comment and then click “Submit” to send the change request back to UNC GA.

<table>
<thead>
<tr>
<th>Action</th>
<th>By</th>
<th>Date</th>
<th>End Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returned</td>
<td>Courtney Thornton</td>
<td>02/04/2016</td>
<td>Pending Response From Campus</td>
</tr>
<tr>
<td><strong>UNCGA Comment</strong>: Please give more information</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requested</td>
<td>Joe cpc_of_uncg</td>
<td>02/04/2016</td>
<td>Request Pending Approval</td>
</tr>
</tbody>
</table>

**Request Detail:**

- **Requested Change:** Title Modification
- **Current Value:** Interior Architecture
- **Requested Value:** Exterior Architecture
- **Status:** Pending Response From Campus

**Your Input:**

- Current Title:
- New Title:
- Brief Justification for Request:

I certify that the Chancellor has approved this title change request.

Supporting Documentation:

Upload
DISCONTINUATION REQUESTS

Discontinuation requests can take many forms and may involve multiple steps. For this reason, the Discontinuation Wizard was created in order to walk the requestor step by step through the process. Three main types of discontinuations have been identified. The Discontinuation Wizard will walk the requestor through all necessary steps for each type:

1. **Discontinue Delivery**: The program itself remains active but one or more delivery types are eliminate.
2. **Discontinue / Consolidate**: One or more programs are discontinued but they become a component of another program.
3. **Discontinue Permanent**: One or more programs are simply discontinued and will not continue as a component of another program.

In order to access the Discontinuation Wizard, click the Discontinue box with the red x on the upper right hand corner of the main API page.

Then select the type of discontinuation request that you would like to make and click “Next.”

The rest of this section describes the process for each of the three types of discontinuation requests in the order that they appear above.
**Discontinue Delivery**

In the Discontinuation Wizard, choose “Discontinue Delivery” and click “Next.” You will then be asked to choose from the dropdown menu the program for which you would like to discontinue one or more delivery types.

Once the program is selected, all of the active delivery types and locations associated with that program will appear. Click the trashcan to the right of the delivery type or location to be discontinued.
Next certify that the Chancellor has approved the discontinuation request and upload the Request to Discontinue (PDF only). The Request to Discontinue form must be completed and submitted at the time of the request. Then click “Submit.”

When the request is submitted, the following confirmation message will appear. You can begin another discontinuation request or exit the Discontinuation Wizard.
**Discontinue/ Consolidate**

In the Discontinuation Wizard, choose “Discontinue/ Consolidate” and click “Next.” You will then be asked to choose whether you would like to consolidate the program(s) that you will be discontinuing into an existing program (one already approved by the BOG) or a new program. Then click “Next.”

![Discontinuation Request](image)

**Existing Program**

After choosing that you want to consolidate discontinued programs into an “Existing Program,” click “Next,” you will be asked to choose from the dropdown list the existing degree program that will accept components of the program or programs to be discontinued. Then click “Next.”

![Discontinuation Request](image)
By clicking the checkbox(es), select the program or programs to be discontinued and consolidated into the previously chosen existing program. For each program that is to be discontinued, upload a completed Request to Discontinue (PDF only). Then click “Submit.”
NEW PROGRAM

After choosing that you want to consolidate the discontinued programs into a “New Program,” click “Next.” By clicking the checkbox(es), select which program(s) will be discontinued and consolidated into the new program. For each program that is to be discontinued, upload a completed Request to Discontinue (PDF only). Then click “Next.”
You will then be prompted to fill out a new program request the same way that you would in PREP. Then click “Submit.” The new program request will then be routed to PREP and subject to an abbreviated approval process. The linked discontinuations and consolidation request will be approved or denied as a whole. In other words, the discontinuations cannot be approved until the new degree program is approved.
Discontinue Permanent

After choosing “Discontinue Permanent” and clicking “Next,” select by clicking the checkbox(es) which program(s) will be discontinued. For each program that is to be discontinued, upload a completed Request to Discontinue (PDF only). Then click “Submit.”