DegreeWorks Plans Tab

The Student Educational Planner (SEP) is a planning tool that students and advisors can use to create academic plans based on a student's future academic goals.

As a student or an advisor, you can use the Plans module to create educational plans. You can add terms and requirements to a plan. You can also run audits for a plan to check the progress against the plan. Once a plan is populated, it can be modified as needed. Plans can also be locked to only allow advisors the ability to modify.

Access plans

To access the plans for a student, first search for and select the student in the DegreeWorks interface, and then click Plans.
If the student is following a particular plan and that plan has been marked as an active plan, then that plan will be displayed by default. You can see the other plans by clicking the View Plan List button. The plans home page is displayed with the list of all the educational plans for the student.

You can switch between plan views by selecting the desired view from the View drop-down list.
A plan can be opened in one of the following views:

**Calendar view**

The calendar view provides a high-level view of each term in the plan, grouped and listed by academic year. The courses and other requirements for each term are displayed, along with some associated details such as the credits, hours and whether the requirement is on-track. You cannot make any modifications to the plan in this view.
Edit view

The edit view is the more detailed view of the plan. This view is also the one to use when you want to modify the plan.

Plan details in the Edit view

When you view a plan in the edit view, the plan details are displayed in sections. The student’s name is displayed first. Notes are displayed on the plan; both on the terms on a plan and on the requirements on a term. A note with content is indicated by an icon and an empty note is indicated by an icon.

The plan Description is the description entered by the person who created the plan. The Degree and Level, for which this plan is meant for, are displayed next. An check box indicates whether this plan is currently being used for an active major. The Locked check box indicates whether this plan can be modified by the student, or whether it has been locked by an advisor.

The plan terms are displayed next, depending on the term scheme that the plan follows. The requirements for each term are also displayed, along with the total credits specified for all the requirements on that term.

Click the icon to expand all the terms and see the details of all terms. Click the icon to close all the terms. The list of Courses and the list of Still Needed courses are displayed in separate boxes on the right hand side of the screen.

Click the icon to see the course descriptions and future class schedule for the courses on the plan. 

NOTE: If a choice requirement is used, all possible selections will appear in the information.
Audit View

The audit view displays the plan and the corresponding degree audit for the plan side by side. The audit processes a student's coursework against the requirements associated with the student's degree data. The report also lists the completed, not completed, in-progress, and transfer classes. All future course requirements are also included in the audit. The courses that have not been taken yet, but are required for completing the specified degree are listed as Still Needed.

![Audit View Image]

Future planned courses that are extracted from the Plans appear in blue.

![Future Planned Courses]

You cannot make any modifications to the plan in this view.

Notes View

The notes view provides a high-level view of the plan, similar to the calendar view, with additional options to display or hide all the notes attached to the plan. The details for each term in the plan are displayed, grouped and listed by academic year. The courses and other requirements for each term are displayed, along with some associated details such as the credits and hours. The tracking status for each requirement, term, and for the plan, is displayed.
Create a plan

You can create a plan based on a template or you can create a blank plan.

- For a blank plan, you will need to select and add the terms individually.
- A plan based on a template will have the terms and requirements pre-defined. Templates are created in conjunction with the Office of Curriculum Systems. If interested in a Template for your majors or department, please contact Curriculum Systems. A program of study will help in the development of the Template. Templates will be added as available to the template menu.

Create a blank plan

Complete the following steps to create a plan:

1. Click New Plan on the plans home page. The Create Plan box is displayed.
2. Click Blank Plan. The new blank plan is displayed.

3. Enter a Description for the plan. Standard recommended practice is degree underscore major such as BBA_Accounting.

4. Select the Degree to which this plan applies from the drop-down list.

5. If this is an active major, select the Active check box.

6. The Locked check box can be used to prevent students from making modification to the plan. After being locked, advisors can still modify the plan.
7. To add a term to the plan, click the icon and select the term from the drop-down list. The term is displayed on the plan.

8. Add requirements for each term on the template. See Term Requirements below.

9. To add notes on the plan, on a term, or on a term requirement, click the corresponding icon.

10. Click Save.

The plan is saved and will be displayed in the list of existing plans.

Create a plan based on a template

Complete the following steps to create a plan:

1. Click New Plan on the plans home page. The Create Plan box is displayed.
2. Click **Select Template**. The list of templates is displayed.

3. Search for the template that you want to use by typing a part of the template description text in the search box and clicking **Go**.

4. OR Select the template that you want the plan to be based on, by double-clicking the template record in the template list.

5. Select the term that you want to use as the starting term from the **Start Term** drop-down list and click **OK**. The plan is displayed with the terms listed according to the term scheme of the template, and with the requirements and notes for each term displayed, if they were specified in the template.
6. Enter a **Description** for the plan. Standard recommended practice is degree underscore major such as BBA_Accounting.

7. Select the **Degree** to which this plan applies from the drop-down list.

8. If this is an active major, select the **Active** check box.

9. The **Locked** check box can be used to prevent students from making modification to the plan. After being locked, you and other advisors can still modify the plan.

10. Add or modify requirements for each term on the template. **Note:** you will not be able to add requirements to terms that have already been completed.
11. To add notes on the plan, on a term, or on a term requirement, click the corresponding icon.

12. Click **Save**.

The plan is saved and will be displayed in the list of existing plans.

**Term Requirements**

You can add the requirements to each term on a plan.

The following requirement types can be added to a term:

- Course
- Choice
- Placeholder

**Add a Course requirement to a term**

Complete the following steps to add a Course requirement to a term:

1. Click the icon on the term to which you want to add the requirement. The list of available requirement types is displayed.

2. Select **Course** from the list. The course fields are displayed on the term.
3. Click inside the box under Course Requirement, and enter the name of the course.

4. To search for a course, click the icon.

5. Enter a part of or the full name of the Course or Title, and click Go. The courses that match the text you entered are displayed.

6. Select the course that you want to specify as a requirement. The course is displayed in the Course Requirement box and the Credits for that course are displayed. If the course is a variable credit course, then the credits for that course are blank, and you can change it to a value within the range for that course.

7. To see additional information for the course, click the icon. The Course Information window is displayed with the course name, title, minimum credits, and sections for the course.
8. Select the grade requirement from the **Minimum Grade** drop-down list. This is optional.

![Minimum Grade Drop-Down List]

9. If this is a critical requirement for the term, select the **Critical** check box. Critical markings should not be overused. This is primarily for “show stopping” prerequisite courses. In the current term, critical marks will be green for on-track or red for off-track. The plan is considered off-track if two or more terms are off-track. The student must be a current and active for tracking to apply.

![Critical Tracking]

Nightly jobs will update tracking for the current term only.

10. To add a note to the requirement, click the **icon.**

Requirements are saved when the plan is saved. If building a longer plan, save periodically as you work for best performance.

**Drag Course Requirement into Term on a Plan**

**Note:** You can also drag and drop a course requirement from a list of courses into a term on a plan.

Complete the following steps to access the course list and insert a course from there into a term:
1. To access the course list, click the button on the right hand side of the plan screen. A box containing the course list expands out.

2. Click **Courses** and click the icons to expand the course list, to find the course that you want. You can also access the **Still Needed** courses list for the list of courses that still need to be completed. **NOTE:** Courses that use a wildcard or are part of proxy advice cannot be selected for drag-and-drop.

3. Click on the course name to see the course details. The **Course Information** window is displayed with the course name, title, minimum credits, and sections for the course.

4. Drag the desired course into the term box.

   The course requirement is added to the term. Requirements are saved when the plan is saved. If building a longer plan, save periodically as you work for best performance.
**Add a Choice requirement to a term**

The Choice requirement type can be used to add several courses, or a range of courses, as a single group requirement. You can also add a group of courses, where any one course from that group could be used as the requirement.

A Choice requirement is defined using options and items. An item could be a course (for example ENGL 1101), a range of courses (ENGL 1101:1103), or even a course wildcard (ENGL@). An option is a row that contains items. You can add multiple rows of options.

If the plan contains multiple options, you can select one of the options as the requirement.

Examples of options:

- **Single course**: ENGL 1101.
- **Single course and a range of courses**: ENGL 1101 and ENGL 1102:1103. This implies that ENGL 1101 and ENGL 1102, ENGL 1102E, and ENGL 1103 are a part of the requirement option.
- **All courses of a particular type using a wildcard**: ENGL@. This implies that any of the courses containing “ENGL” (ENGL 1101, 1102, etc.) are included as part of the requirement option.
- **A variety of courses**: ENGL 1101, MATH 1113 or POLS 1101.

The following illustrates how the choice requirement is displayed on a plan term:

<table>
<thead>
<tr>
<th>Critic</th>
<th>Choice Requirement</th>
<th>Minimum Credits</th>
<th>Minimum Grade</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>(ENGL 1102 or ENGL 1103)</td>
<td>(ENGL 1102 or ENGL 1103)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Complete the following steps to add a Choice requirement to a term:

1. Click the icon on the term to which you want to add the requirement. The list of available requirement types is displayed.
2. Select **Choice** from the list. The choice requirement fields are displayed on the term.
3. Click inside the **Choice Requirement** box to start defining the requirement options.
4. Select the option button alongside the option you want to use for the requirement. To view details for a course in the option, click the icon.

5. If applicable, specify the Credits or the Minimum Hours for this requirement.

6. Select the grade requirement from the Minimum Grade drop-down list. This is optional.

7. If this is a critical requirement for the term, select the Critical check box.

8. To add a note to the requirement, click the icon.

9. Once a specific course is selected for the individual student, click the radio button next to the course.

The course choice requirement is saved when the plan is saved. If building a longer plan, save periodically as you work for best performance.

**Add a Placeholder to a term**

The Placeholder requirement type can be used to add requirements that cannot be categorized under the other available requirement types.

Complete the following steps to add a Placeholder requirement to a term:
1. Click the icon on the term to which you want to add the requirement. The list of available requirement types is displayed.

2. Select Placeholder from the list. The Placeholder fields are displayed on the term.

3. Select “Comment” from the type of requirement from the Placeholder Requirement drop-down list.

4. Click inside the box under Value and enter the corresponding text for the requirement. This is best used for requirements such as applying to graduate, applying to enter the major, reminders of Legislative requirements, etc.

5. To add a note to the requirement, click the icon.

Requirements are saved when the plan is saved. If building a longer plan, save periodically as you work for best performance.

Reassign requirements between terms

You can drag and drop requirements to reassign them between existing terms on a plan. Click on the requirement you want to reassign, and drag it to the term to which you want it to be reassigned.

The requirement is moved to the new term. Requirements are saved when the plan is saved.

Reassign all term requirements

You can reassign all the requirements from one term to another new term. Complete the following steps to reassign requirements:

1. Click Reassign on the term box.
2. Select the term to which you want the requirements reassigned, from the drop-down list that is displayed on the left top corner of the term box.

3. Click OK.

The new term is created and requirements are moved to that term. The old term is removed.

**Note:** You cannot reassign all requirements from a term to an already existing term.

**Delete a requirement from a term**

Complete the following steps to delete a requirement from a term:

1. Search for and open the plan (in Edit mode) from which you want to delete the requirement. The plan details are displayed.

2. Click on the requirement to select the requirement from the term.

3. Click the icon. The requirement is removed from the term. The updated term is not saved till you save the plan.

4. Click Save.

The modified plan is saved.

**Delete a term**

To delete a term, click **Delete this term** on the term box and click OK to confirm the action.

The term is removed from the plan.

**Notes**

You can use notes to provide additional information or tips to users when they modify or use a plan. Notes can be added to the plan, to terms on the plan, and to requirements on a term. Advisors can also select whether or not the note will be visible to students who use that plan or only to advisors.

**View the list of notes**

Click the icon on the plan, term, or requirement. The list of notes attached to that plan, term, or requirement is displayed. You can also place the mouse pointer to hover over the icon to see the notes that are attached to that plan, term, or requirement.
**Add a note**

You can add a note to a plan, to a term, or to a requirement on a term. Complete the following steps to add a note:

1. Click the icon on the plan, term, or requirement on which you want to add the note. The Notes page is displayed.

   ![Notes page](image)

2. Click Add Note. A text editor is displayed.

   ![Add Note button](image)

3. Type the content of the note in the editor. You can use the formatting options of the editor to format your note text.

4. If you do not want the note to be visible to students, select the Internal checkbox.

   ![Internal checkbox](image)

5. Click Done and Save the plan.

The note is saved.

**Edit a note**

Complete the following steps to edit a note:

1. Click the note icon. The Notes page is displayed with the list of notes attached to that plan, term, or requirement.
2. Click on the note that you want to edit, and then click **Edit Selected Note**. The text of the note is displayed in a text editor.

3. Edit and format the note as required using the formatting options of the editor.

4. If you do not want the note to be visible to students, select the **Internal** check box.

5. Click **Done** and **Save** the plan.

The updated note is saved.

**Delete a plan**

Complete the following steps to delete a plan:

1. From the list of plans, click on the plan that you want to delete.
2. Click **Delete** at the upper right corner of the page. A message is displayed, prompting you to confirm the action.

3. Click **OK**.

The plan is deleted.