

# 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** tab to create academic Plans.

## Access Plans

To access the Plans for a student, first search for and select the student in the DegreeWorks interface and then select the **Plans Tab**.

The screenshot shows the 'Audit' page in DegreeWorks. The top navigation bar includes 'AUDIT', 'EXCEPTIONS', 'PLANS' (highlighted with a red box), 'ADMIN', and 'LINKS'. The main content area displays student information for 'Student, Test J' in the 'BS - Biology' program. The student is a 3rd-year undergraduate with a cumulative GPA of 3.97 and an overall GPA of 3.97. The page also shows the student's major (Biology), minor (Chemistry), and matriculation term (Fall 2023).

If Plans already exist for the student, they will display under the **Plan List** card.

The screenshot shows the 'Plan List' table with a 'NEW PLAN' button in the top right corner. The table has columns for Description, Active, Modified, Who, Program, Level, and Lock Status. There are three rows of plans listed, all with a 'Locked' status.

Description	Active	Modified	Who	Program	Level	Lock Status
BS_Biology (Fall 2024)	Yes	04/22/2025		BS_BIOL	UG	Locked
Spring 2024 academic advising plan BCMB pre-dental	Yes	09/13/2023		BS	UG	Locked
Fall 23 Proposed Schedule	Yes	06/02/2023		BS	UG	Locked

Total results: 3

Users can either edit an existing Plan or create a new Plan. Best practice is to only edit Plans you have created, but all advisors can edit any Plan and students can edit any Plan on their record that is not **locked**.

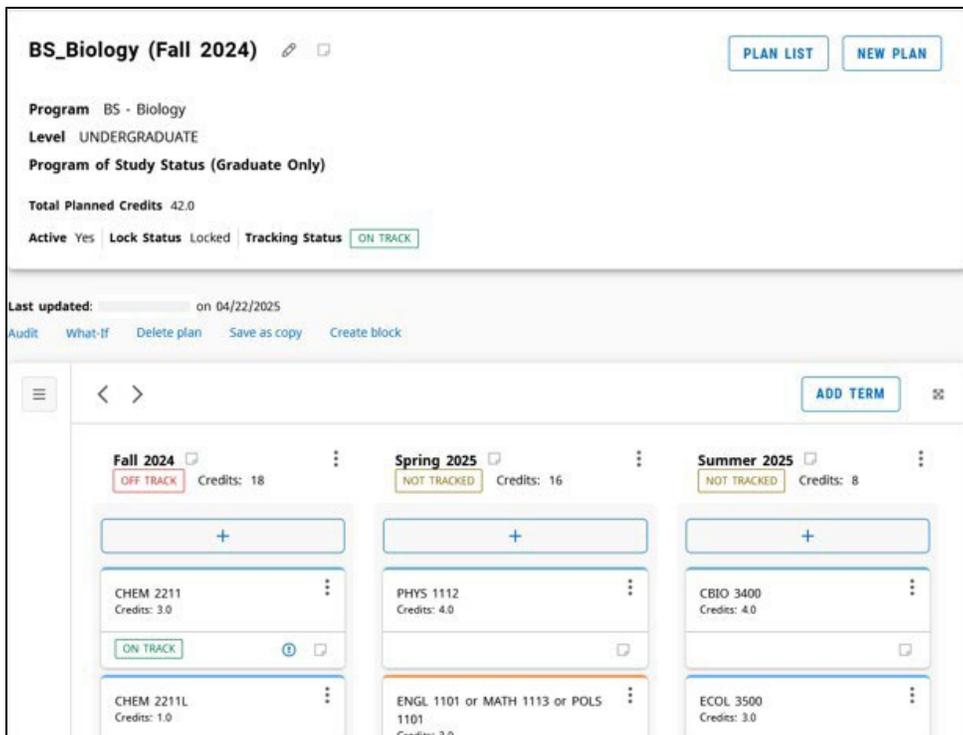
**Note:** Plans auto-save after any change is made. There is no way to undo changes that have been saved.

**Note:** If this error message displays when selecting a Plan, it cannot be edited. The saved Plan program does not match the student's record.

 This plan degree and school combination does not match the student's curriculum. Please ensure the correct plan has been chosen before updating.

## Editing a Plan

Click on a Plan to begin editing.



The Plan **Description** is the description entered by the person who created the Plan.

**BS\_Biology (Fall 2024)**  

The **Program** and **Level** for which this Plan is meant are displayed next.

**Program** BS - Biology  
**Level** UNDERGRADUATE

**Note:** **Program of Study Status (Graduate Only)** is only used by Graduate and Professional programs.

**Program of Study Status (Graduate Only)**

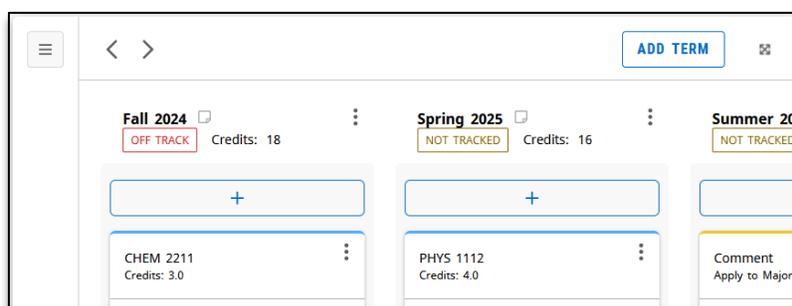
**Active** indicates whether the Plan is currently being used for an active major. **Locked** indicates whether the Plan can be modified by the student or if it has been locked by an advisor.

**Active** Yes | **Lock Status** Locked

To edit information in the top card, users can click on the pencil icon next to the description.



The requirements for each term are displayed along with the total credits specified for all the requirements on the term.



The terms card can be expanded by clicking on the icon in the right upper corner of the Plan term card.



The screenshot displays a user interface for managing academic requirements across three terms: Fall 2024, Spring 2025, and Summer 2025. Each term has a header with its name, a tracking status (OFF TRACK, NOT TRACKED), and a total credit count. Below each header is a list of requirements, each with a course name, credit value, and a tracking status (ON TRACK, OFF TRACK, NOT TRACKED). The interface includes navigation arrows, an 'ADD TERM' button, and a 'Comment' section for each requirement.

Term	Tracking Status	Credits	Requirement	Requirement Credits	Requirement Status
Fall 2024	OFF TRACK	18	CHEM 2211	3.0	ON TRACK
Fall 2024	OFF TRACK	18	CHEM 2211L	1.0	ON TRACK
Fall 2024	OFF TRACK	18	CHEM 3710	3.0	ON TRACK
Fall 2024	OFF TRACK	18	BCMB 3100	4.0	OFF TRACK
Fall 2024	OFF TRACK	18	Selected: ENGL 1101E	3.0	ON TRACK
Fall 2024	OFF TRACK	18	(BIOL 1103 and BIOL 1103L)	4.0	ON TRACK
Spring 2025	NOT TRACKED	16	PHYS 1112	4.0	NOT TRACKED
Spring 2025	NOT TRACKED	16	@ @ with GE2A	3.0	NOT TRACKED
Spring 2025	NOT TRACKED	16	ENGL 1101 or MATH 1113 or POLS 1101	3.0	NOT TRACKED
Spring 2025	NOT TRACKED	16	ENGL 1101 or ENGL 1102:1103	3.0	NOT TRACKED
Spring 2025	NOT TRACKED	16	ENGL @	3.0	NOT TRACKED
Summer 2025	NOT TRACKED				

See **Term Requirements** section for information about populating and editing requirements.

## Notes

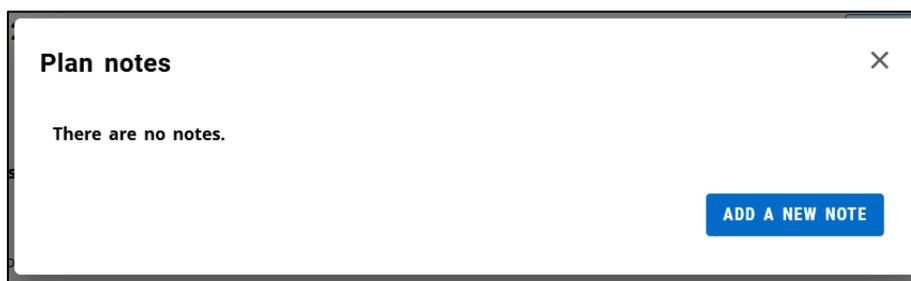
Notes are used to provide additional information or tips to users when modifying or creating a Plan. Notes can be added to the Plan, to terms on the Plan, and to requirements in a term. Advisors can also mark notes “Internal Use Only” so that they will only be visible to other advisors.

### Add a Note

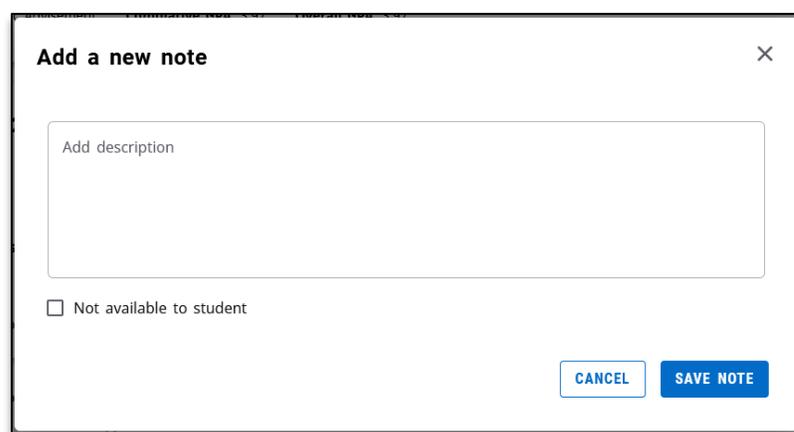
Complete the following steps to add a note:

1. Click the Notes icon on the Plan, term, or requirement for which you want to add the note. The *Notes* page pop-up will display.





2. Click **Add a New Note**. A text editor will display.



3. Type or copy and paste the content for the note in the editor.
4. Advisors have the option to mark notes as internal use only by selecting the **Not available to student** checkbox. These notes will still be available to other advisors.



5. Click **Save Note**.

Multiple notes can be saved to a requirement.

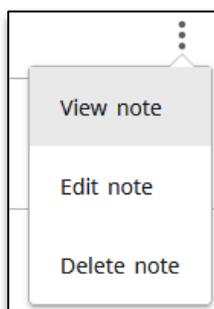
### *Edit a Note*

Complete the following steps to edit a note:

1. Click the Note icon. If a requirement already has a note, it will be highlighted in blue.



- Click the ellipsis beside the note and choose **Edit note** from the dropdown.



- Edit and format the note as required.
- Advisors have the option to mark the edited note as internal use only by selecting the **Not available to student** checkbox. These notes will still be available to other advisors.

- Click **Save Note**.

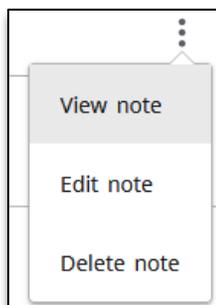
### *Delete a Note*

Complete the following steps to delete a note:

- Click the note icon. If a requirement already has a note, it will be highlighted in blue.



- Click on the ellipsis beside the note and choose **Delete Note** from the dropdown.



3. Click **Delete** at the upper right corner of the page. A message is displayed, prompting you to confirm the action.



4. Click **Delete Note**.

## Create a Plan

You can create a Plan based on a template or you can create one using 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 now created in PARC. If you are interested in a Template for your majors or department, you can make changes to existing Plans during the annual Bulletin update cycle through the PARC system. Once the Bulletin goes live, no additional changes will be permitted to the programs. For additional information, please contact Curriculum Systems

([bulletin@uga.edu](mailto:bulletin@uga.edu)). A program of study will help in the development of the Template. Templates will be added as available to the template menu.

### Create a Plan using a Blank Plan

Complete the following steps to create a Plan:

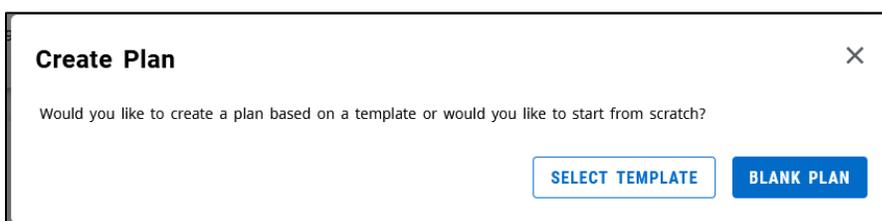
1. Click **New Plan** on the Plans List card. The **Create Plan** box is displayed.



The screenshot shows a rectangular card titled "Plan List". In the top right corner of the card, there is a blue button with the text "NEW PLAN".



A close-up of the "NEW PLAN" button, which is blue with white text and a thin white border.



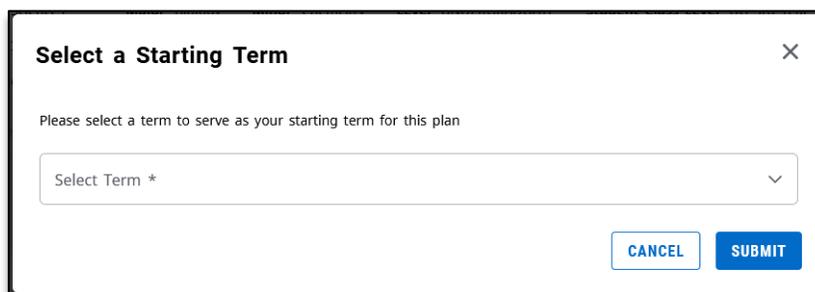
The screenshot shows a dialog box titled "Create Plan" with a close button (X) in the top right corner. The text inside the dialog asks, "Would you like to create a plan based on a template or would you like to start from scratch?". At the bottom right, there are two buttons: "SELECT TEMPLATE" (white with blue border) and "BLANK PLAN" (solid blue).

2. Click **Blank Plan**. The new blank Plan will display.



A close-up of the "BLANK PLAN" button, which is solid blue with white text.

3. Select a **Starting Term** from the dropdown. Click Submit.



The screenshot shows a dialog box titled "Select a Starting Term" with a close button (X) in the top right corner. The text inside the dialog asks, "Please select a term to serve as your starting term for this plan". Below the text is a dropdown menu with the placeholder text "Select Term \*". At the bottom right, there are two buttons: "CANCEL" (white with blue border) and "SUBMIT" (solid blue).



A close-up of the dropdown menu from the previous step. The selected option is "Fall 2025". The text "Select Term \*" is visible above the dropdown arrow.

4. Enter a **Description** for the Plan.  
**Note:** Program of Study Status (Graduate Only) dropdown is only used by Graduate and Professional programs.

**Edit Plan** [X]

Description \*

Program of Study Status (Graduate Only) [v]

Active  Locked

CANCEL SAVE

Description \*  
BS\_Biology (Fall 2025)

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

**Edit Plan** [X]

Description \*  
BS\_Biology (Fall 2025)

Program of Study Status (Graduate Only) [v]

Active  Locked

CANCEL SAVE

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.

**Edit Plan** [X]

Description \*  
BS\_Biology (Fall 2025)

Program of Study Status (Graduate Only) [v]

Active  Locked

CANCEL SAVE

7. Click **Save**. This will take you to the card where you can begin adding courses and editing the Plan.



8. To add terms to the Plan, click the Add Term button. Select an additional term from the dropdown and click Add.



There are several ways to add requirements. See **Term Requirements** section for information about populating requirements.

### *Create a Plan Based on a Template*

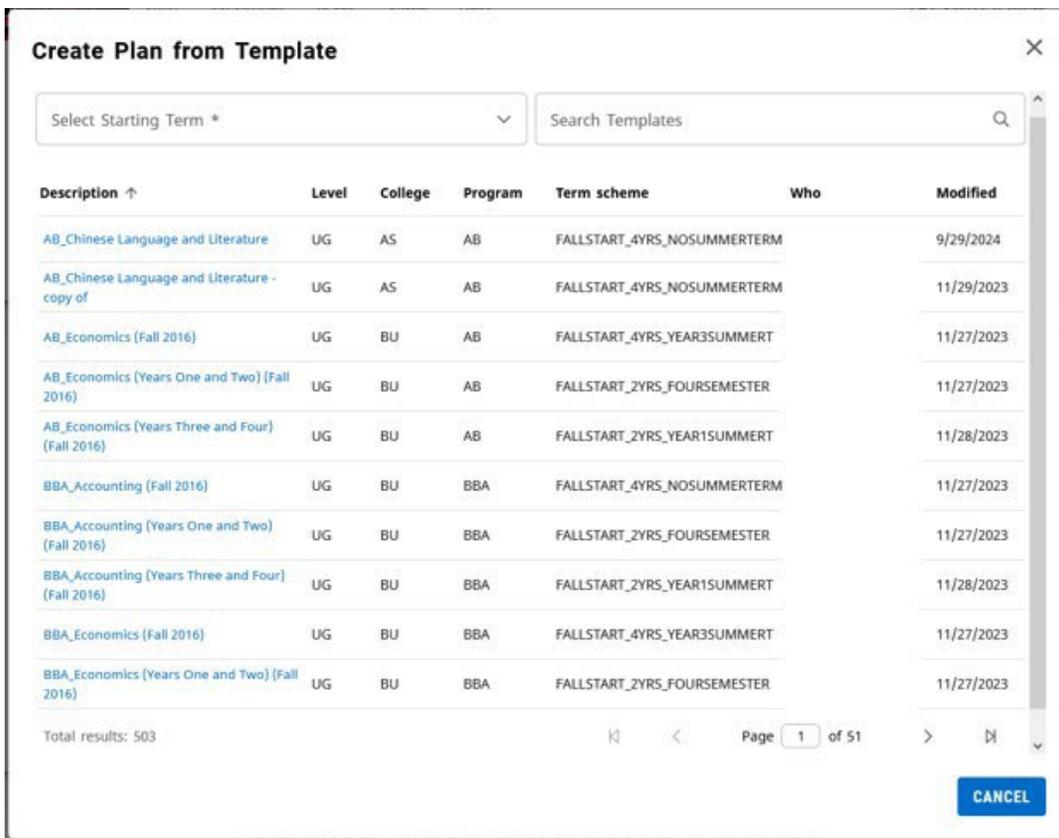
Complete the following steps to create a Plan:

1. Click **New Plan** on the Plans List card. The Create Plan box will display.

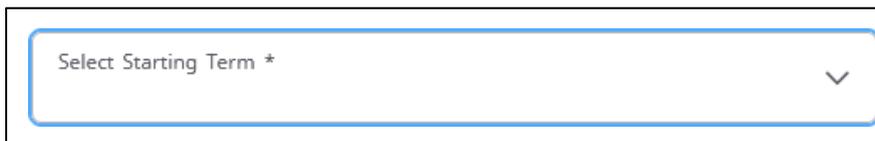


2. Click **Select Template**. A pop-up will display.





3. Select Starting Term from the dropdown.



4. Choose a template. Users have the option of searching using the Search Templates field or by clicking through the results pages. Plans are also sortable by all columns.  
**Note:** Some of the program names in the Description column have abbreviated titles due to character restrictions. When using the search field, typing the full title may yield fewer results.



Description ↑	Level	College	Degree
<a href="#">BBA_Management (Operations &amp; Supply Chain Mgmt) (2025)</a>	UG	BU	BBA_MGMT
<a href="#">BBA_Management and International Business (Operations &amp; Supply Chain Mgt) (2025)</a>	UG	BU	BBA_INTB_MAN

After selecting a template, users can edit the Plan. This may include changing the description, marking the Plan as Active and/or Locked, and deleting or reassigning courses.

See the **Term Requirements** section for information about populating requirements.

## Term Requirements

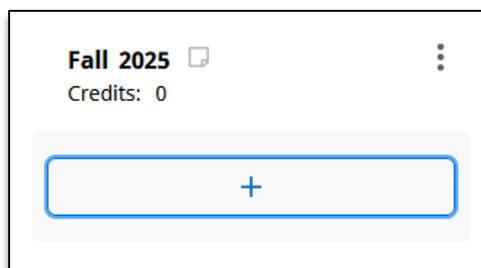
The following requirement types can be added to a term:

- Course
- Choice
- Placeholder

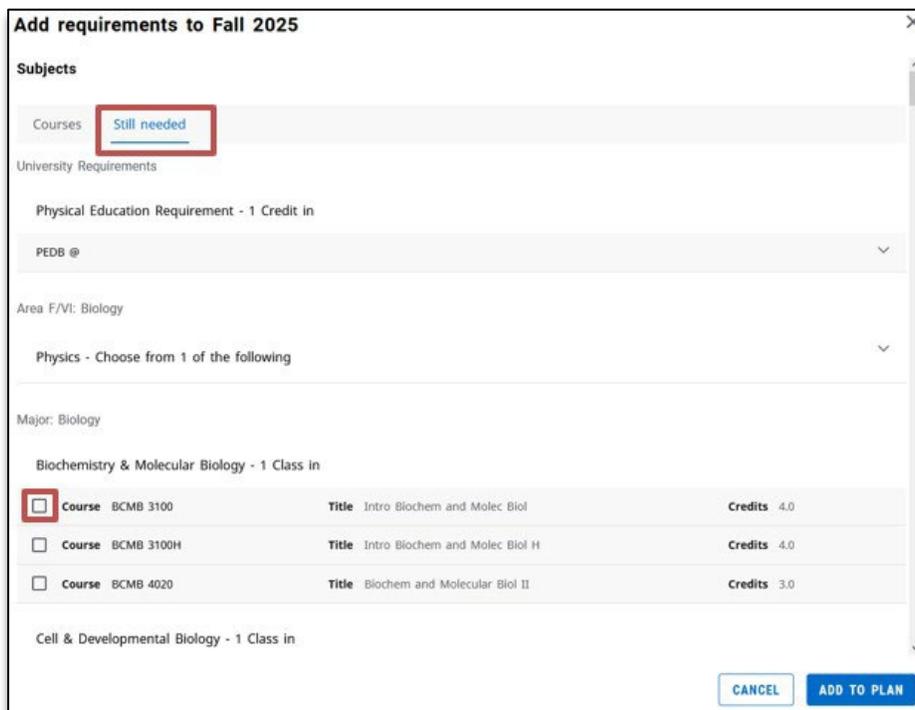
### *Add a Course Requirement to a Term*

Complete one of the following methods to add a Course requirement to a term:

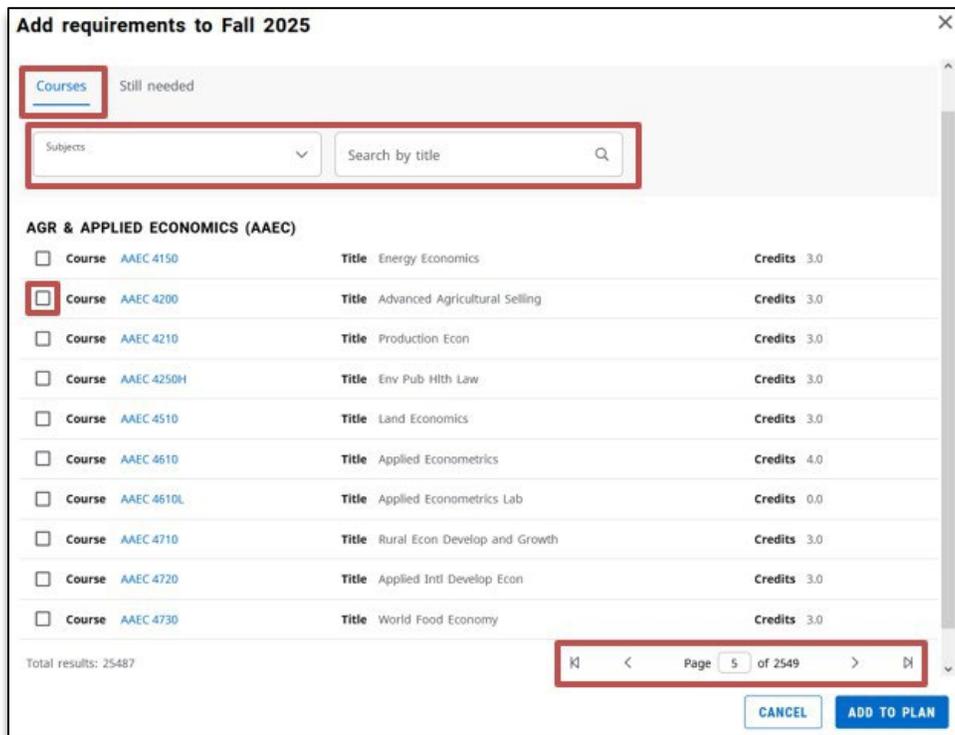
**Method 1:** Use the plus sign under the term.



1. This will pull up **Still Needed** courses. Click the **checkboxes** beside courses to select them. Multiple courses can be chosen before selecting **Add to Plan**.

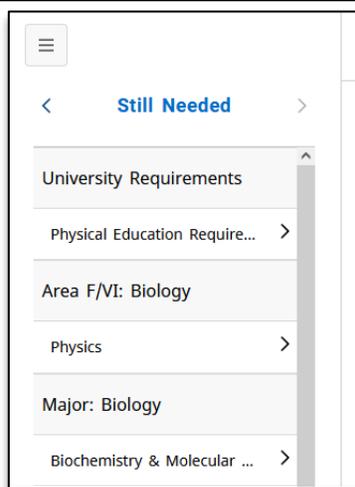
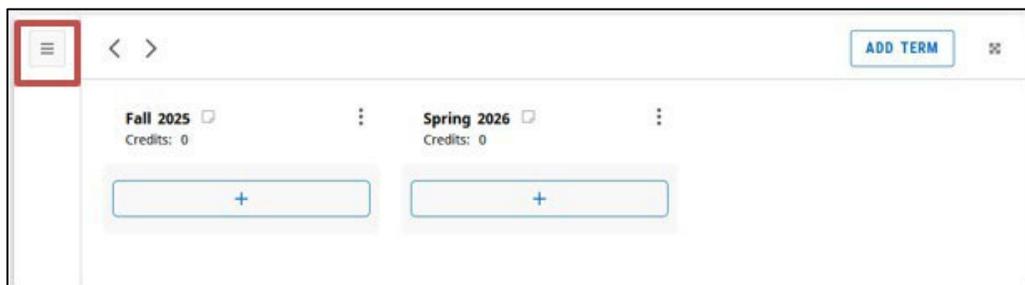


- Alternatively, users can click on the **Courses** tab. Search for a course using the dropdown, search bar, or by searching the results pages at the bottom. Click the **checkboxes** beside courses to select them. Multiple courses can be chosen before selecting **Add to Plan**.

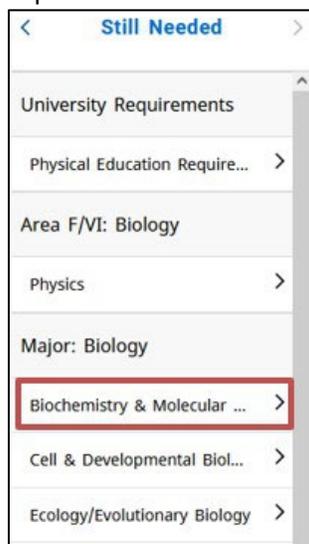


**Method 2:** Drop and drag from the side bar.

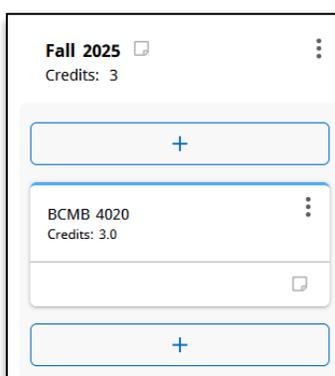
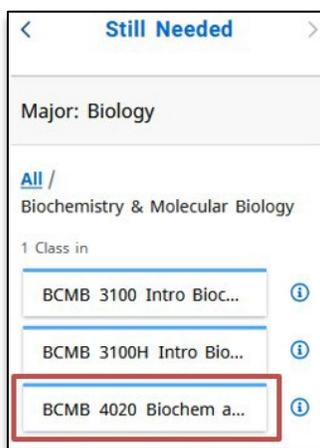
- Expand the sidebar. This will pull up **Still Needed** courses.



2. Click on one of the requirement options.



3. **Drag and drop** one of the course options into one of the terms.

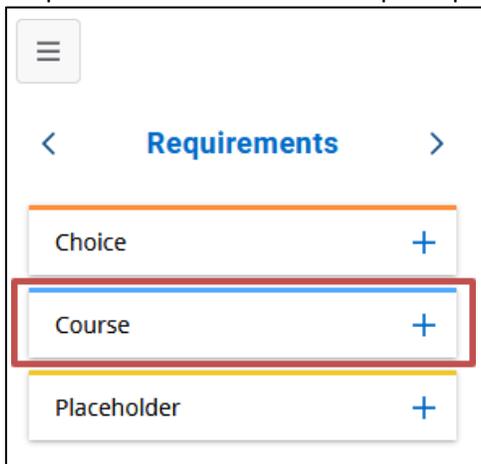


**Method 3:** Drag and drop Course option from the Requirements sidebar.

1. Click the left arrow in the Still Needed sidebar.



2. Drag and drop the Course option into a Term. This will open a pop-up.



**New Requirement** [X]

Requirement type  
Course

Term \*  
Spring 2026 [v]

Critical  Honors

Course requirement \* [Q]

Credits

Minimum grade [v]

[CANCEL] [SAVE]

3. Type a course number and prefix into the search bar. This will display options matching what was typed. **A course must be chosen from the suggested options before saving.** An error message will pop up if Save is selected before one of the suggested options is chosen.

**New Requirement** [X]

Requirement type  
Course

Term \*  
Spring 2026 [v]

Critical  Honors

Course requirement \*  
PHYS 1112 Intro Physics Electricity [X]

PHYS 1112 Intro Physics Electricity  
PHYS 1112L Intro Physics Electricity Lab

Minimum grade [v]

[CANCEL] [SAVE]

Course requirement \*  
PHYS 1112 Intro Physics Electricity [X]

PHYS 1112 Intro Physics Electricity  
PHYS 1112L Intro Physics Electricity Lab

Minimum grade [v]

[CANCEL] [SAVE]

4. Once a course is chosen, the credit hours will auto-populate and will appear grayed out. If a course has variable credit, it will default to the highest possible credit value. Instead of being gray like a standard course, the Credits field will be white and editable. If the variable credit requirement needs to be lowered, the user can manually change the number.

Course requirement \*  
PHYS 1112

Credits  
4.0

Course requirement \*  
MUSI 4000

Credits  
6.0

5. If applicable, select a grade from the **Minimum Grade** drop-down list. **This is optional.**

Course requirement \*  
PHYS 1112

Credits  
4.0

Minimum grade

6. If this is a critical requirement for the term, select the **Critical** check box.  
**Note:** Critical 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 have an active and locked Plan for tracking to apply.

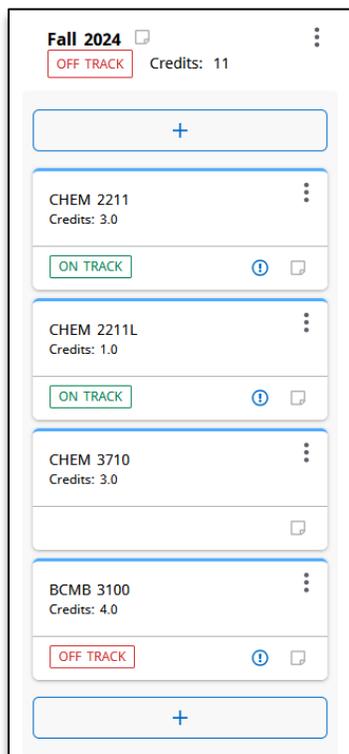
**Edit Requirement**

Requirement type  
Course

Critical  Honors

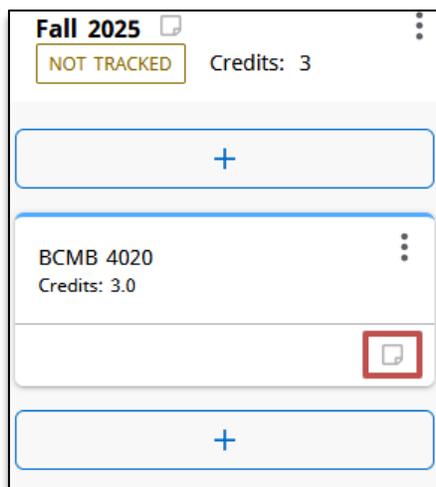
Course requirement \*  
CHEM 2211

Credits  
3.0

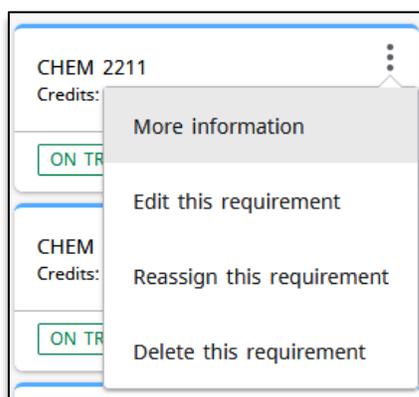
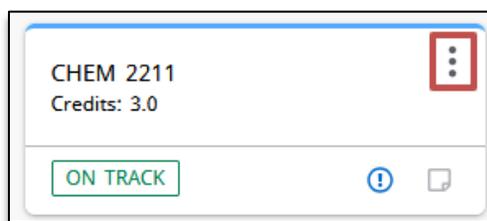


Nightly jobs will update tracking for the current term only.

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



- To see additional information for the course, click the ellipsis beside the individual course or for the term.



**More Information** displays course information that includes the course name, title, minimum credits, and sections for the course in real time.

**Course Information** ✕

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**CHEM 2211 - 3 Credits - Modern Organic Chemistry I**

This course, the first of a two-semester sequence, is an introduction to the chemistry of carbon compounds and discusses common functional groups from the perspective of molecular structure. Areas of emphasis include structure, characterization, preparation, organic synthesis, stereochemical concepts, and the relationship of physical and chemical properties to molecular structure.

**Sections:**

Term	CRN	Section	Seats open	Meeting times	Campus
Fall 2024	13095	0	2 (out of 120)	M W F 10:20am - 11:10am Tu 03:55pm - 04:45pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm	Athens
Fall 2024	49794	0	2 (out of 170)	M W F 11:30am - 12:20pm Tu 05:30pm - 06:20pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm	Athens
Fall 2024	57193	0	-1 (out of 222)	M W F 09:10am - 10:00am M 12:40pm - 01:30pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm W 05:30pm - 07:00pm	Athens
				Tu Th 09:35am - 10:50am Th 12:45pm - 01:35pm	

### *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.

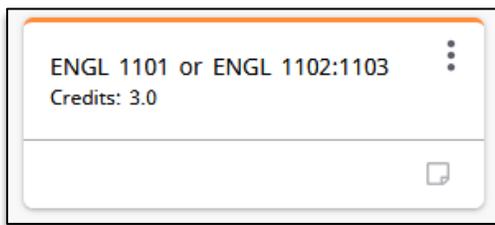
A Choice can be equivalent course options, a course wildcard (ENGL @), course wildcard with attribute (@@ with GE2A), lecture and lab combinations, or a range of courses (ENGL 1101:1103). Users can also add multiple rows of options. If the Plan contains multiple options, you can select one of the options as the requirement.

Examples of commonly used options:

- *Equivalent courses:* ENGL 1101, 1101E, 1101S.



- *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.



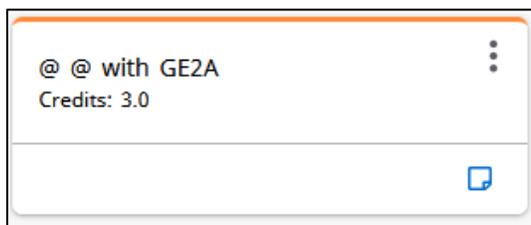
- *All courses of a particular type using a wildcard:* ENGL @. This implies that any of the courses containing "ENGL" (ENGL 1101, 1102, etc.) are included as part of the requirement option.



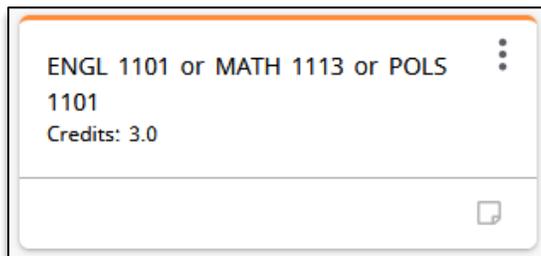
- *All courses of a particular type using a wildcard:* ENGL 3@ or ENGL 4@ or ENGL 5@. This second example implies that any upper division ENGL course is included as part of the requirement option.



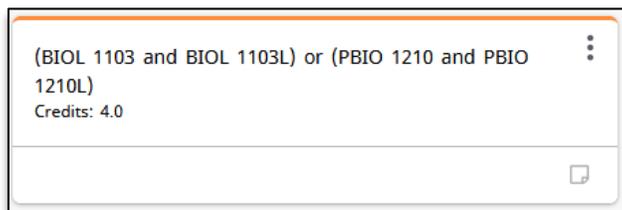
- *Wildcard requirement with attribute:* @@ with GE2A. This implies that any course containing a Core Area II Lecture attribute is a requirement option.



- *A variety of courses:* ENGL 1101, MATH 1113 or POLS 1101.

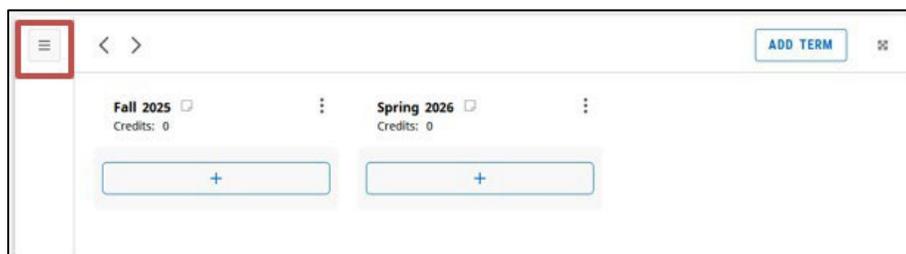


- *Lecture and Lab combinations:* BIOL 1103 and 1103L OR PBIO 1210 and 1210L.



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

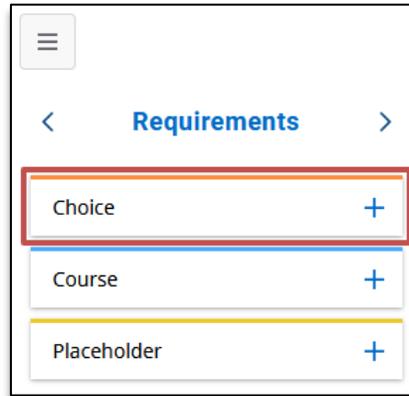
1. Expand the sidebar. This will pull up **Still Needed** courses.



2. Click the left arrow in the sidebar.



3. Drag and drop the Choice option into a Term. This will open a pop-up.



 A screenshot of the "New Requirement" form. The "Requirement type" is set to "Choice". The "Term" is "Fall 2024". There are checkboxes for "Critical" and "Honors". Under "Choice requirement", there is a search field with "Course \*" and an "Attribute" dropdown. A "CLEAR SELECTION" button is visible. At the bottom, there are "Credits" and "Minimum grade" fields, and "CANCEL" and "SAVE" buttons.

4. Type a Choice option into the search field. A dropdown will appear and display options matching what was typed. **Choose one of the suggested options before saving.** An error message will pop up if Save is selected before one of the suggested options is chosen.

The screenshot shows a 'Choice requirement' form. At the top right is an 'Add' button. Below it is a search field containing 'ENGL 1102|English Compo ...' with a close button (X). To the right is a dropdown menu labeled 'Attribute'. Below the search field is a dropdown menu with three options: 'ENGL 1102 English Composition II', 'ENGL 1102E English Composition II', and 'ENGL 1102S English Composition II SL'. A red box highlights this dropdown menu. To the right of the dropdown is a 'CLEAR SELECTION' button. At the bottom left, there is a 'Credits' field.

After selecting a Choice option, users can add other options using the **Add** button. This will add an additional search field and an “OR” to the requirement after the Choices have been saved.

The screenshot shows a 'Choice requirement' form with one course selected. The search field contains 'ENGL 1101' and the dropdown menu is set to 'Attribute'. An 'Add' button is highlighted with a red box at the top right. Below the search field is a link that says 'Add a paired course or lab'.

The screenshot shows a 'Choice requirement' form with two courses added. The first search field contains 'ENGL 1101' and the dropdown menu is set to 'Attribute'. Below it is a link that says 'Add a paired course or lab'. The second search field contains 'ENGL 1101E' and the dropdown menu is set to 'Attribute'. Below it is another link that says 'Add a paired course or lab'. An 'Add' button is at the top right.

Users can also add paired options using the **Add a paired course or lab** button. This will add an additional search field and an “AND” to the requirement after the Choices have been saved.

The screenshot shows a 'Choice requirement' form with one course selected. The search field contains 'BIOL 1103' and the dropdown menu is set to 'Attribute'. Below the search field is a button labeled 'Add a paired course or lab' which is highlighted with a red box. An 'Add' button is at the top right.

**Choice requirement** Add

Course \* BIOL 1103 × Attribute ▾ 

and

Course \*  🔍 Attribute ▾

**Choice requirement** Add

Course \* BIOL 1103 × Attribute ▾ 

and

Course \* BIOL 1103L × Attribute ▾

(BIOL 1103 and BIOL 1103L) 

Credits: 4.0



Users can use a combination of the **Add** button and **Add a paired course or lab** to create a requirement for multiple paired courses.

**Choice requirement** Add

Course \* BIOL 1103 × Attribute ▾ 

and

Course \* BIOL 1103L × Attribute ▾

Course \* PBIO 1210 × Attribute ▾ 

and

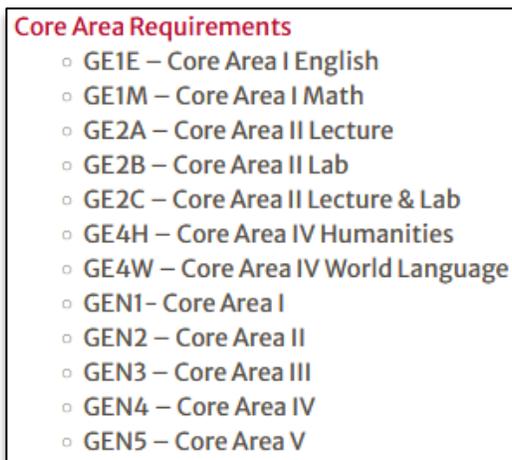
Course \* PBIO 1210L × Attribute ▾

(BIOL 1103 and BIOL 1103L) or (PBIO 1210 and PBIO 1210L) 

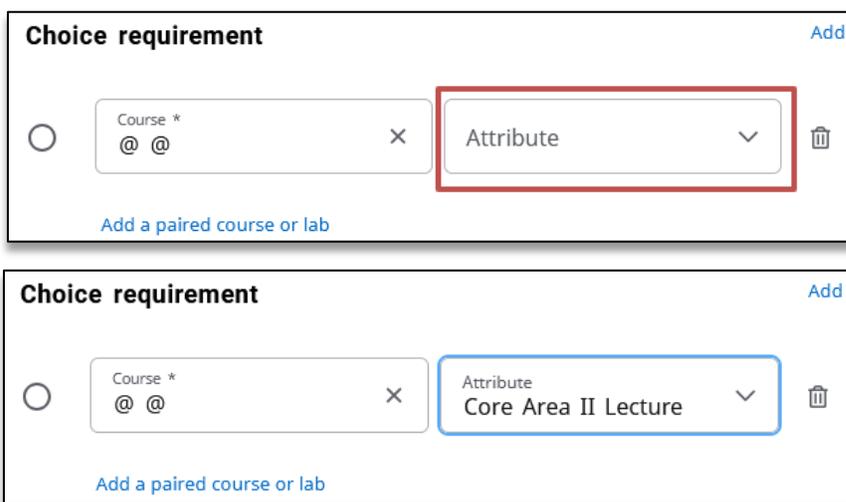
Credits: 4.0



- If applicable, users can also use **attributes** as a part of the Choice requirement. A course attribute is a designation that helps categorize a course for a specific purpose. For example, a course attribute may indicate whether a course fulfills particular program or graduation requirements or highlights specific course characteristics such as format or the inclusion of special components (e.g., lab, writing-intensive). Course attributes also assist both students and advisors with identifying courses that meet certain academic requirements.

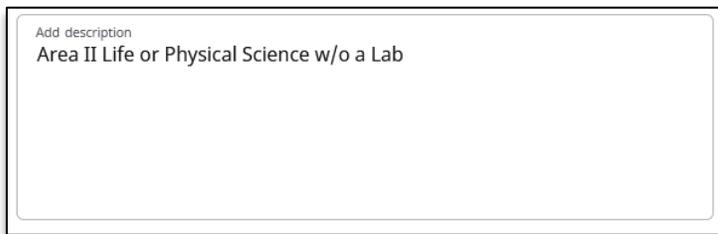


After typing the prefix and course number, choose an attribute from the dropdown.

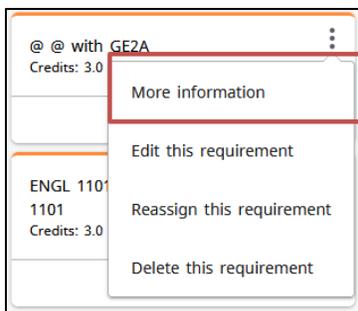


After saving the requirement, the code will appear in the Plan. Best practice is to add a note.





The benefit of using attributes is that they pull all courses meeting this criterion into the More Information course link.



**Course Information** ✕

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**ANTH 2045 - 3 Credits - Intro Biological Anthropology**

Biological anthropology is the study of human biological evolution and biocultural variation. In this course, students will learn about the interdependent relationships between the environment, human adaptation, health, and culture, including human-induced effects on the environment, as well as the evolution, biology, and behavior of human ancestors and non-human primates.

**Sections:**

Term	CRN	Section	Seats open	Meeting times	Campus
Spring 2026	66934	0	48 (out of 48)	To be announced	Athens
Spring 2026	70074	0	300 (out of 300)	To be announced	Athens
Spring 2026	70093	0	24 (out of 24)	To be announced	Athens

---

**ANTH 2045E - 3 Credits - Intro Biological Anthropology**

Biological anthropology is the study of human biological evolution and biocultural variation. In this course, students will learn about the interdependent relationships between the environment, human adaptation, health, and culture, including human-induced effects on the environment, as well as the evolution, biology, and behavior of human ancestors and non-human primates. Non-traditional format: This course will be taught 95% or more online.

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**ANTH 2045W - 3 Credits - Intro Biological Anthropology**

Biological anthropology is the study of human biological evolution and biocultural variation. In this course, students will learn about the interdependent relationships between the environment, human adaptation, health, and culture, including human-induced effects on the environment, as well as the evolution, biology, and behavior of human ancestors and non-human primates. Non-traditional format: The W suffix is used for courses taught as writing intensive, which means that the course includes substantial and ongoing writing assignments that a) facilitate learning; b) teach the communication values of a discipline; for example, its practices of argument, evidence, credibility, and format; c) support writing as a process; and d) prepare students for further writing in their academic work, in graduate school, and in professional life. Writing instruction and assignments are integral to the class's learning objectives, and the instructor (and/or the teaching assistant assigned to the course) will be closely involved in supporting students as writers.

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**ASTR 1010 - 3 Credits - Astronomy of the Solar System**

Astronomy from early ideas of the cosmos to modern observational techniques. The solar system planets, satellites, and minor bodies. The origin and evolution of the solar system.

**Sections:**

Term	CRN	Section	Seats open	Meeting times	Campus
Spring 2026	56575	0	115 (out of 115)	To be announced	Athens

---

**ASTR 1020 - 3 Credits - Stellar and Galactic Astronomy**

The study of our Sun and other stars, their physical properties and evolution, interstellar matter, star clusters, our galaxy and other galaxies, and the origin and evolution of the Universe.

**Sections:**

Term	CRN	Section	Seats open	Meeting times	Campus
Spring 2026	27375	0	43 (out of 43)	To be announced	Athens

---

**ASTR 1110 - 3 Credits - Intro Astronomy for Majors I**

When students register for classes in Athena, they will see the corresponding attribute listed on applicable courses.

**Class Details for Concepts in Biology BIOL - Biology 1103 0**

Term: 202508 | CRN: 10098

Class Details	<b>Title:</b> Concepts in Biology
Catalog	<b>College:</b> College of Arts and Sciences AS
Course Description	<b>Department:</b> Biological Sciences BIOL
Instructor/Meeting Times	<b>Hours:</b> Credit Hours: 3 Lecture: 3
Enrollment/Waitlist	<b>Levels:</b> Undergraduate UG
Restrictions	<b>Grading Modes:</b> Standard S Satisfactory/Unsatisfactory U
Cross Listed Courses	<b>Schedule Types:</b> Lecture LEC
Linked Sections	<b>Attributes:</b> College Biol Sci - A&S BAS Env Lit - Prior to Fall 2012 ENV1 Env Aware - Fall 2012-Sum 2020 ENV2 Env Aware - Fall 2020 or later ENV3 Campus Fee Package F2F <b>Core Area II Lecture GE2A</b> Core Area II GEN2
Fees	
Prereqs/Coreqs/Syllabus	
Bookstore Links	

Close

6. Specify the minimum **Credits** for the requirement. This field does not auto-populate for Choice.

Credits 3.0
----------------

7. If applicable, select the grade requirement from the **Minimum Grade** drop-down list. **This is optional.**

Minimum grade	▼
---------------	---

8. If this is a critical requirement for the term, select the **Critical** check box.  
**Note:** 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 have an active and locked Plan for tracking to apply.

**Edit Requirement**

Requirement type  
Choice

Critical  Honors

**Choice requirement** Add

Course \*  
ENGL 1101 × Attribute ▾

[Add a paired course or lab](#)

Course \*  
ENGL 1101E × Attribute ▾

[Add a paired course or lab](#)

ENGL 1101 or ENGL 1101E  
Credits: 3.0

ON TRACK

(BIOL 1103 and BIOL 1103L) or (PBIO 1210 and PBIO 1210L)  
Credits: 4.0

OFF TRACK

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

ENGL 1101 or ENGL 1101E  
Credits: 3.0

ON TRACK

10. Once a specific course is selected for the individual student, select the radio button next to the course and Save.

### *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.

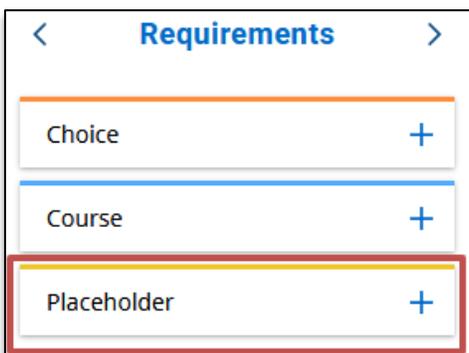
Complete the following steps to add a Placeholder requirement to a term:

1. Expand the sidebar. This will pull up the **Still Needed** courses.

2. Click the left arrow in the sidebar.



3. Drag and drop the Placeholder option into a Term. This will open a pop-up.



 A screenshot of a 'New Requirement' pop-up form. The title 'New Requirement' is at the top left, and a close 'X' icon is at the top right. The form contains four input fields: 'Requirement type' with 'Placeholder' selected, 'Term \*' with 'Summer 2026' selected, 'Placeholder \*' with a dropdown arrow, and 'Value \*' which is empty. At the bottom right, there are two buttons: 'CANCEL' and 'SAVE'.

4. Select "Comment" from the type of requirement from the **Placeholder Requirement** drop-down list.

 A screenshot of the 'New Requirement' form, focusing on the 'Placeholder \*' dropdown menu. The dropdown is open, showing 'Comment' as the selected option. The 'Value \*' field below it is empty. The 'CANCEL' and 'SAVE' buttons are visible at the bottom right.

- 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.

A screenshot of a text input field. The field contains the text "Apply to Major". Above the text, the label "Value \*" is visible. The field is enclosed in a rounded rectangular border.

- The value field has a character limit. To add a note to the requirement, click the **Notes** icon.

A screenshot of a comment box. The box has a yellow header and contains the text "Comment" and "Apply to Major". In the bottom right corner, there is a red square icon representing a note or comment. A red box highlights this icon.

### *Reassign Requirements Between Terms*

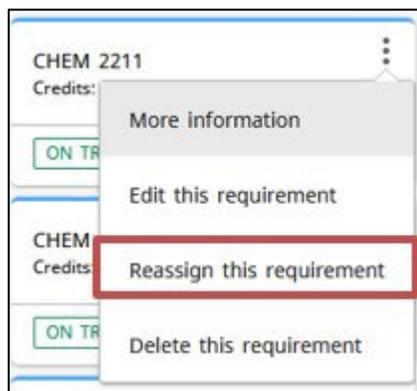
Drag and drop requirements to reassign them between existing terms on a Plan. Click on the requirement you want to reassign. Drag and drop it into a different term. This method is helpful when moving courses to an adjacent term.

Requirements can also be reassigned using the **Reassign this requirement** option. This method is helpful when moving courses across several terms.

- Click the ellipsis beside the individual course.

A screenshot of a course requirement card. The card displays "CHEM 2211" and "Credits: 3.0". Below this, there is a green button labeled "ON TRACK". In the top right corner, there is a red square icon representing an ellipsis menu. A red box highlights this icon.

- Choose **Reassign this requirement** from the dropdown.



3. Select a term and click Reassign.

**Reassign Requirement** ×

Reassign to which term?

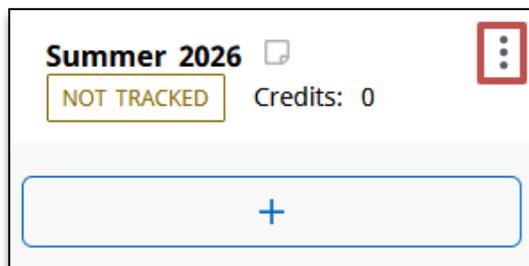
Select term \* ▼

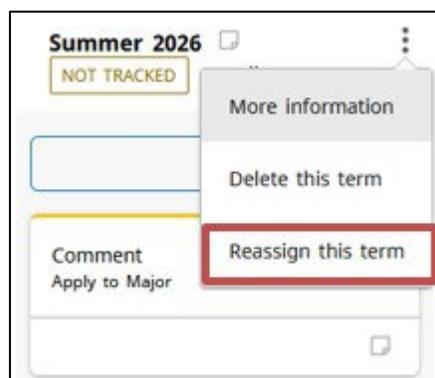
CANCEL
REASSIGN

### *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 the ellipsis beside the term and choose **Reassign this term** from the dropdown. This will open a pop-up window.





2. Select the term to which you want the requirements reassigned from the drop-down and click **Reassign**.

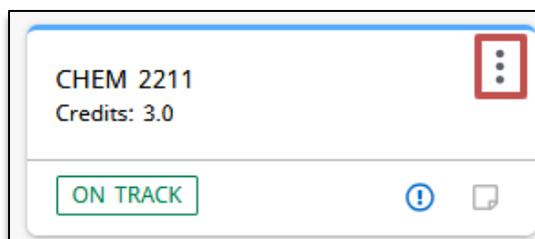
The new term is created and requirements are moved to the new term. The old term is removed.

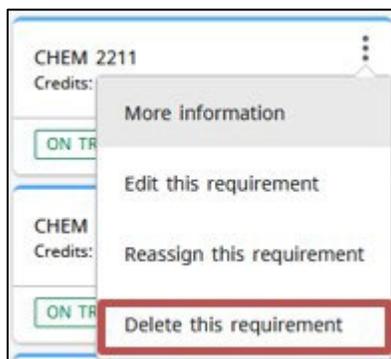
**Note:** You cannot reassign all requirements from a term to an already existing term.

### *Delete a Requirement from a Term*

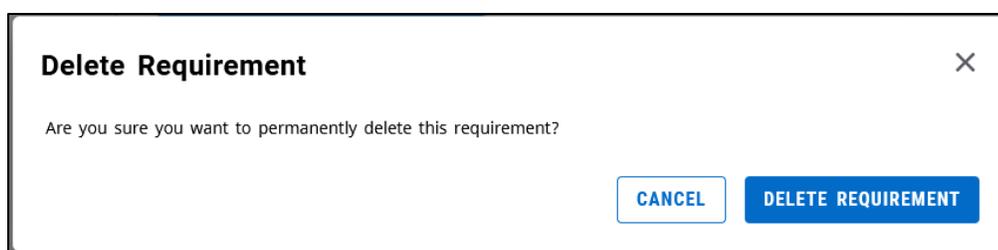
Complete the following steps to delete a requirement from a term:

1. Click the ellipsis beside the individual courses or for the term. Choose **Delete this requirement** from the dropdown.



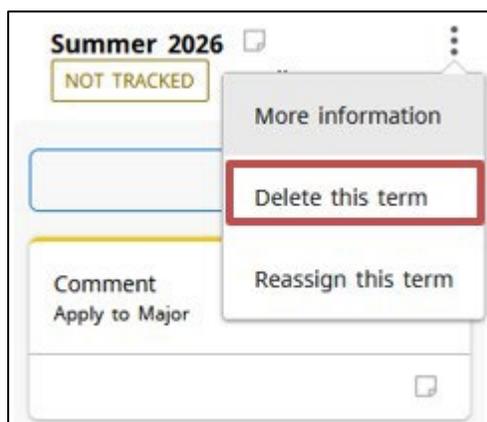
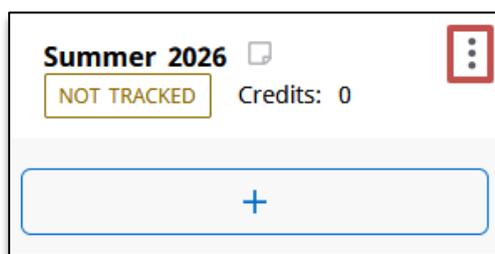


2. **Delete this requirement** removes the course from the term.

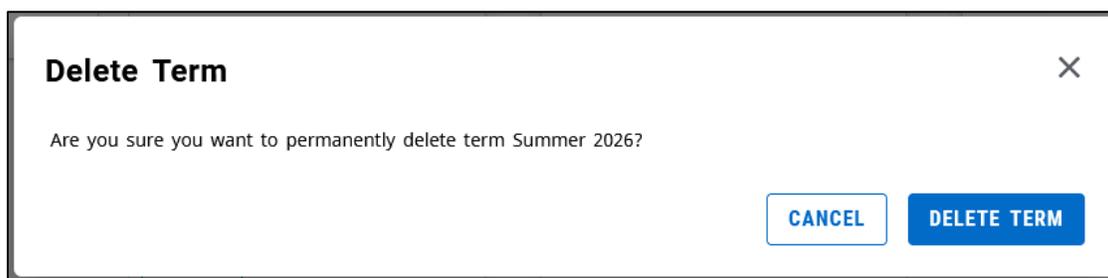


### Delete a term

1. Click the ellipsis beside the term and choose **Delete this term** from the dropdown. This will open a pop-up window.



2. Click **Delete Term**. This will remove the term from the Plan.



## Additional Features

### Planner Audit

The **Audit** option displays a copy of the student's audit.



Future Planned courses as well as completed, in-progress, and transfer classes will display in this Planner audit. The courses that have not been taken yet but are required for completing the specified degree are listed as **Still Needed**.

A screenshot of the "Planner Audit" interface. At the top, it shows "Student Name Student, Test J" and "Plan Description BS\_Biology (Fall 2025)". To the right, under "Degree Progress", it shows "Cumulative GPA 3.97". Below this, it lists "Program BS - Biology", "Level UNDERGRADUATE", "Classification UG 3rd Year", and "Major Biology". It also shows "Minor Chemistry", "Degree BS - Bachelor of Science", and "College College of Arts and Sciences". The "Audit Date" is "04/22/2025 12:28 PM". A "Collapse all" link is visible. The main section is titled "Degree: Bachelor of Science" with an "INCOMPLETE" status. It lists "Credits Required: 121" and "Credits Applied: 94". A note states "General Elective Credits Required = 14. See General Electives section below for the number of elective credits that have already been satisfied. Credits taken in excess of this number may fall into the Excess Credit section. You have 94 overall credits, which include courses applied to audit requirements, In-Progress/Pre-Registered Courses, General Electives, and Excess Credits." Below this, it says "To view cross-listed and equivalent courses: Online Learning (E), Service-Learning (S), Honors (H), Integrated Language (I), Writing Intensive (W), please consult the Bulletin. A link to the the Bulletin can be found under the Links menu at the top of this page." At the bottom, there are two "Still needed" items: "121 Minimum Credits Required" and "39 Upper Division Course".

Future Planned courses will display **PLAN** in the Grade column.

Major: Biology		INCOMPLETE				
Credits Required: 34		Credits Applied: 24		Bulletin Term: Spring 2024 - Bulletin		GPA: 3.96
<b>Unmet conditions for this set of requirements:</b>		10 Credits needed				
Students in Franklin College must earn a grade of 'C' (2.0) or better in major required courses.						
	Course	Title	Grade	Credits	Term	
<input type="radio"/>	Biochemistry & Molecular Biology	BCMB 3100	Intro Biochem and Molec Biol	PLAN	(4)	Fall 2024
<input checked="" type="checkbox"/>	BIOL Courses					
<input checked="" type="checkbox"/>	Principles of Biology II	BIOL 1108	Principles of Biology II	A	3	Fall 2023
		BIOL 1108L	Principles of Biology II Lab	A-	1	Fall 2023

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

[Audit](#)   [What-If](#)   [Delete plan](#)   [Save as copy](#)

### *What-If*

This option allows users to see how Planned courses would fall in the audit if the student chose a different program.

### Planner What-If Analysis

#### Planner What-If Analysis

**Program**

Catalog year \*  
Fall 2025 -... ▾

Degree \*  
BS - Bache... ▾

Level \*  
UNDERGR... ▾

College \*  
College of ... ▾

Program \*  
BS - Biology ▾

**Areas of study**

Major \*  
Biology ▾

Concentration ▾

Minor ▾

Additional areas of study ▾

#### Delete Plan

This option permanently deletes the Plan.

#### Delete Plan

Are you sure you want to permanently delete this plan?

#### Save as copy

This option saves a new copy of the same Plan. This is useful if users want to preserve the original copy and edit a new copy. After clicking Save as Copy, a duplicate Plan will appear in the Plan List. The new copy will be inactive and unlocked. Best practice is to change the description before updating.

Description	Active	Modified ↓	Who	Program	Level	Lock Status
BS_Biology (Fall 2024)	No	04/22/2025		BS_BIOL	UG	Not Locked
BS_Biology (Fall 2024)	Yes	04/22/2025		BS_BIOL	UG	Locked