

Degree Works Plans Tab – Academic Planner

- Students without a plan will display a Create Plan box.
- Choose Blank Plan for a returning or transfer student.
- Choose Select Template for a new student.

The screenshot shows the 'Plans' tab selected in the Academic Planner. At the top, there are fields for Student ID (900131286), Name (Bear, JP The), Degree (AS), Major (Tennessee Transfer Path), Last Audit (Today), and Last Refresh (Today at 8:59 am). Below these are tabs for Worksheets, Plans, Notes, Exceptions, GPA Calc, and Admin. The main area displays 'Student Planner for: Bear, JP The' and 'List of plans'. A 'Create Plan' dialog box is open, asking 'Would you like to create a plan based on a template or would you like to start from scratch?' with buttons for 'Blank Plan' and 'Select Template'.

Blank Plan

The screenshot shows the 'Blank Plan' form. The 'Plans' tab is selected. The form includes a 'Description' field (highlighted with a red box), 'Active' and 'Locked' checkboxes, 'Degree' (Associate of Science), and 'Level' (Undergraduate). The 'Tracking Status' is 'Not displayed, plan is not active'. There are 'View' and 'Edit' buttons in the top right corner.

Give the plan a title. I would suggest the program name for which you are advising them.

The screenshot shows the 'Blank Plan' form with 'Biology' entered in the 'Description' field. The 'Active' checkbox is checked (highlighted with a red box). The 'View' and 'Edit' buttons are also highlighted with red boxes.

Check the checkbox for Active, otherwise the student will not be able to see this plan on their Degree Works.

Then add semesters by clicking on the  to the right of the Active checkbox.

The screenshot shows the 'Add Term' dialog box, which is a list of semesters from 'The Beginning' to 'Summer 2020'. The list is scrollable and includes options for Fall, Spring, and Summer for each year.

Degree Works Plans Tab – Academic Planner

Here I have added three semesters.

Student Planner for: Bear, JP The View: Edit

Description: Biology Active Locked

Degree: Associate of Science Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Semester	Total Credits	Buttons
Fall 2018	0.0	Reassign Delete this term + -
Spring 2019	0.0	Reassign Delete this term + -
Summer 2019	0.0	Reassign Delete this term + -


To add courses you can do one of two things.

1. Edit View

View: Edit

Add Requirement

- Choice
- Course
- Placeholder

Click on the  on the term line to a requirement.

1. **Choice Requirement** – allows input option of two or more courses. You must use the specific course rubric and number when adding a choice requirement.
2. **Course Requirement** – allows input of one specific course rubric and number.
3. **Placeholder Requirement** – allows adding requirements that are not specific courses. (General elective, Speech elective)

Choice Requirement – once added click in the choice requirement box.

Fall 2018 Total Credits: 0.0 Reassign Delete this term + -

Critical	Choice Requirement	Minimum Credits	Pointer	Minimum Grade	Notes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	None	None	

Type in the course rubric and number (PSYC 1030) in the course box then click Add another option to get your second course box. You can add several course options but I would recommend only using this option for two or three course choices. Then click Done.

Fall 2018 Total Credits: 0.0 Reassign Delete this term + -

Critical	Choice Requirement	Minimum Credits	Pointer	Minimum Grade	Notes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	None	None	

Course	Attribute	Course/Lab	Attribute
<input type="radio"/>	<input type="text"/>		None

Add another option **Select none** **Done**

Course	Attribute	Course/Lab	Attribute
<input type="radio"/>	PSYC 1030		None
<input type="radio"/>	SOCI 1010		None

Add another option **Select none** **Done**

Degree Works Plans Tab – Academic Planner

The Minimum Credits box must have a credit value. Ignore the Pointer option and the Minimum Grade is optional.

A screenshot of the 'Minimum Credits' field in the Academic Planner interface. The field is a text box containing 'None', with a dropdown arrow to its right. The field is highlighted with a red border. Above the field, there are buttons for 'Reassign' and 'Delete this term'. The interface also shows 'Fall 2018' and 'Total Credits: 0.0'.


Course Requirement is straight forward. Enter the course rubric and number. The credits will populate when you hit tab or click out of the box. The minimum grade is optional.

A screenshot of the 'Course Requirement' field in the Academic Planner interface. The field is a text box containing a search icon and an information icon. The field is highlighted with a red border. Above the field, there are buttons for 'Reassign' and 'Delete this term'. The interface also shows 'Fall 2018' and 'Total Credits: 0.0'.


Placeholder Requirement is a drop down box with a value text box. Select your requirement then type in the credit hours required.

Two screenshots of the 'Placeholder Requirement' field in the Academic Planner interface. The first screenshot shows a dropdown menu with 'Select' selected. The second screenshot shows a dropdown menu with 'General Elective' selected and a text box containing '3.0'. Both screenshots are highlighted with a red border. Above the fields, there are buttons for 'Reassign' and 'Delete this term'. The interface also shows 'Fall 2018' and 'Total Credits: 0.0'.

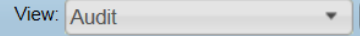


Continue to add requirements to each semester on the students plan.  periodically.

How to delete a requirement

Click in the white area at the end of the requirement to select. It will change to a dark blue color when selected. Click  on the term line and the requirement will disappear.

A screenshot of the 'Placeholder Requirement' field in the Academic Planner interface. The field is a dropdown menu with 'General Elective' selected and a text box containing '3.0'. The field is highlighted with a dark blue border. Above the field, there are buttons for 'Reassign' and 'Delete this term'. The interface also shows 'Fall 2018' and 'Total Credits: 0.0'.

2. Audit View  (Note the View is a drop-down box along the top blue line of the plan)

This view is a side-by-side audit/plan view. Used for light editing with drag and drop of courses.

A screenshot of the 'Student Planner' interface in 'Audit View'. The interface shows a list of requirements on the left and a summary of the student's progress on the right. The requirements list includes 'Concentration in Biology', 'General Biology I (Majors)', 'General Chemistry I', 'College and Lifelong Learning', 'Composition I', 'History Elective', 'General Biology II (Majors)', and 'General Chemistry II'. The summary on the right shows 'Biology' with 'Active: Yes' and 'Status: NOT LOCKED'. It also shows '2018-2019 Academic Year' with 'Fall 2018, Total Credits: 0.0', 'Spring 2019, Total Credits: 0.0', and 'Summer 2019, Total Credits: 0.0'. The interface also shows 'Worksheets', 'Plans', 'Notes', 'Exceptions', 'GPA Calc', and 'Admin' tabs at the top.

Degree Works Plans Tab – Academic Planner

Hover over a course in the audit, click and hold, and drag the course to the desired semester on the right. Then unclick will drop the course into that semester. If a mistake is made you must switch the view back to Edit view to make any changes such as deleting or adding a placeholder requirement.

The screenshot shows a list of course requirements on the left and semester selection options on the right. The requirements include:

- FALL TERM
 - General Biology I (Majors)
Still Needed: 4 Credits in BIOL 1110
 - General Chemistry I
Still Needed: 4 Credits in CHEM 1110
 - College and Lifelong Learning
Still Needed: 1 Class in EDUC 1030
 - Composition I
Still Needed: 1 Class in ENGL 1010
 - History Elective
Still Needed: 1 Class in HIST 1210 or 1220 or 2010 or 2020 or 2030
- SPRING TERM
 - General Biology II (Majors)

On the right, there are two semester selection boxes:

- 2018-2019 Academic Year**
Fall 2018, Total Credits: 0.0
EDUC 1030 3.0
- 2018-2019 Academic Year**
Spring 2019, Total Credits: 0.0

Always save before changing views.

Clicking **Refresh Audit** will do as it says and show the courses that have been placed in the plan.

The screenshot shows the Degree Works interface with a plan selected. The plan includes:

- College and Lifelong Learning (EDUC 1030) PLAN (3) Fall 2018
- Composition I (ENGL 1010) English Composition I PLAN (3) Fall 2018

Below the plan, there are buttons for **Refresh Audit**, **Print**, and **Save**. The status bar at the bottom indicates: "Last updated by: Lawson, Sherry L. on 23-Feb-2018".

New Student Template (typically used for first time freshman)

The "Create Plan" dialog box asks: "Would you like to create a plan based on a template or would you like to start from scratch?". There are two buttons: **Blank Plan** and **Select Template**. The **Select Template** button is highlighted with a red box.

A list of our programs will display. Type which program you are seeking in the Search by Template Description, then click GO.

The screenshot shows the Student Planner interface. At the top, there are tabs for **Worksheets**, **Plans**, **Notes**, **Exceptions**, **GPA Calc**, and **Admin**. Below the tabs, there is a search bar labeled "Search by Template Description" with a **Go** button and a **Filter:** dropdown. The search results are displayed in a table with columns: **Description**, **Degree**, **Major**, **Catalog Year**, **Term Scheme**, **ID**, **Who**, and **Modified**.

Description	Degree	Major	Catalog Year	Term Scheme	ID	Who	Modified
A.A. Degree Blank Plan	AA	UNPA	201580	2_SEMESTER_	T0000255	Lawson, Sherry L.	5/31/16
A.A. Degree Blank Plan	AA	UNPA	201680	2_SEMESTER_	T0000254	Lawson, Sherry L.	4/13/16
A.S. Degree Blank Plan	AS	UNPA	201580	2_SEMESTER_	T0000256	Lawson, Sherry L.	5/31/16
A.S. Degree Blank Plan	AS	UNPA	201680	2_SEMESTER_	T0000253	Lawson, Sherry L.	4/13/16
Accounting	CRT2	ACTT	201780	2_SEMESTER_	T0000249	Lawson, Sherry L.	6/19/17
Administrative Professional Technology-Business Office	AAS	ADMIN	201780	4_SEMESTER_	T0000268	Lawson, Sherry L.	7/24/17
Administrative Professional Technology-Legal Office	AAS	ADMIN	201780	4_SEMESTER_	T0000269	Lawson, Sherry L.	7/24/17
Administrative Professional Technology-Medical Office	AAS	ADMIN	201780	4_SEMESTER_	T0000270	Lawson, Sherry L.	7/24/17
Advanced Emergency Medical Technician (AEMT)	CRT1	AEMT	201780	1_SEMESTER_	T0000251	Lawson, Sherry L.	6/20/17
Allied Health - Dental Assisting	AAS	ALLH	201780	5_SEMESTER_	T0000252	Lawson, Sherry L.	6/20/17
Allied Health - Medical Laboratory Technology	AAS	ALLH	201780	6_SEMESTER_	T0000148	Lawson, Sherry L.	6/20/17
Auto Body Service Technology	CRT1	TABS	201780	2_SEMESTER_	T0000129	Lawson, Sherry L.	5/26/17

Copyright 1995 - 2016 EBluean Company L.P. and its affiliates.

Degree Works Plans Tab – Academic Planner

Student Planner for: Bear, JP The

Browse Templates

Biology Filter:

Description	Degree	Major
Tennessee Transfer Pathway Biology	AS	UTPS
University Parallel Pre-Wildlife and Fisheries Biology to LMU	AS	UNPA

Double click the program desired. Then the starting term dialog box will appear.

Select a starting Term

Please select a Term to serve as your starting term for this plan

Start Term*

Select a starting Term

Please select a Term to serve as your starting term for this plan

Start Term*

- Fall 2017
- Fall 2018
- Fall 2019
- Fall 2020

Select the term in which the plan will start and click ok. (Currently only fall is showing but spring will be added.)

The template will load and you may make changes as needed. Remember to save!

Worksheets Plans Notes Exceptions GPA Calc Admin

Student Planner for: Bear, JP The

Description: Tennessee Transfer Pathway Biology Active Locked

Degree: Associate of Science Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Fall 2018 Total Credits: 14.0

Critical	Course Requirement	Credits	Minimum Grade	Notes
<input type="checkbox"/>	BIOL 1110	4.0	None	
<input type="checkbox"/>	CHEM 1110	4.0	None	
<input type="checkbox"/>	EDUC 1030	3.0	None	
<input type="checkbox"/>	ENGL 1010	3.0	None	

Placeholder Requirement

Requirement	Value	Notes
History Elective Gen Ed - 3 Cr	3.0	

Spring 2019 Total Credits: 14.0

Critical	Course Requirement	Credits	Minimum Grade	Notes
----------	--------------------	---------	---------------	-------

Still Needed

- Degree in Associate of Science
- Major in Tennessee Transfer Pathways
- Graduation Exit Exam

A couple of extras. There are some preloaded notes in templates and faculty can add notes. Please be aware of what you put in a note, everyone can see these. Examples of notes, Transferring to ETSU advised to take COMM 2045 as the speech elective.

Notes

- No notes
- Note present