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Introduction to Degree Works Student Educational Planner

The Degree Works Student Educational Planner (SEP) is an advising tool that students and advisors can use to map out a clear pathway for timely degree completion. Advising plans created in SEP will show students the required courses within their program(s) and a recommended timeline of when they should be completed.

Objectives

By the end of this manual the user will be able to:

1. Create a Blank Plan
2. Create a Plan from a Template
3. Add to and Modify Plans
PLANS

ACCESS PLANS

1. Access Degree Works through Self-Service Banner.
2. Select Plans at the top of the Degree Works Responsive Dashboard.

3. In the Plan List block, you will see any plans that were previously created.

PLAN TYPES

There are two different options when creating a new plan, Blank Plans and Templates.

Blank Plans allow you to build a customized plan from scratch.

Templates allow you to select a pre-defined template with courses and semesters already added. Note: you can still edit a plan if selected from a Template.
CREATE A BLANK PLAN

1. Select **New Plan** from the Plan List Block.

2. Select **Blank Plan**.

3. Use the drop-down to select the **starting term** for the plan. Select **Submit**.

4. Enter the name of the plan in the Description field.

5. If you have multiple programs of study, you will see the Degree drop-down. Select the **Degree** you are creating the plan for.

6. Select **Active** if you would like to enable tracking.

7. Select **Save**.

8. The Blank Plan will appear. Scroll down to begin adding to the plan. You will see the starting term has been added. Skip to page 8 in the manual.
CREATE A PLAN FROM A TEMPLATE

Please note that not all majors have templates available. If you do not see an appropriate template for your major, please build a plan from scratch or contact your advisor.

1. Select **New Plan** from the Plan List Block.

2. Choose **Select Template**.

3. The list of plans will appear. The “Term Scheme” column states the number of terms that have been planned and the term that the plan starts. Use the drop-down to select the **starting term** for the plan.

4. Use the Search Templates field to narrow down the list or select the **name of the template** from the list. Note: The starting term must match the term start in the “Term Scheme” column. If they do not match you will receive an error.
5. The plan template will appear. Select the pencil icon to edit the plan’s description.

6. If needed, modify the name of the plan in the Description field.

7. If you have multiple programs of study, you will see the Degree drop-down. Select the Degree you are creating the plan for.
8. Select Active if you would like enable tracking.
9. Select Save.
ADD A TERM

You can add other terms to the plan to continue mapping out your coursework.

1. Select Add Term on the right side of the screen.

2. Use the drop-down to select the term for the plan. Select Add.

3. The term will appear on the plan. Repeat the process to add more terms.
ADD A COURSE THAT IS STILL NEEDED

1. On the left side of the screen you will see the categories for the degree requirements that are still needed. Select the arrow next to the category to view the courses.

2. Select the course and drag it to the + icon under the name of the appropriate term.

3. You will see the course listed under the term. Select All to return to the full list of categories for the requirements that are still needed.
ADD A CHOICE REQUIREMENT

A choice requirement is used when a student can choose from multiple courses (ex. this course OR that course). A choice requirement is also used when a course must be paired with another course (ex. this course AND that course). Finally, a choice requirement is used to indicate a free elective (@@) or other course with a “wildcard” symbol (@).

1. On the left side of the screen you will see the Still Needed section. Select the left arrow.

2. Select the + icon next to Choice.

3. Use the term drop-down to select the appropriate term.

4. Add a course by searching course name or subject/number. You can also add a requirement based off of Attribute (if applicable).

5. Select Add if you need to add another course.
6. Optional: Enter the number of credits, minimum grade, select the campus and delivery.
7. Select Save.
ADD A PLACEHOLDER

A placeholder is used for elective credits, internships, etc.

1. From the Requirements section, select the + icon next to Placeholder.

2. Use the drop-downs to select the term and placeholder.

3. Enter the value. The value is the note that will display on the plan. Note: Placeholders do not count toward the credit total and will not check off requirements on the plan. Any number placed in the value field will not be added to the term's total credits.

4. Select Save.
ADD MULTIPLE COURSES

1. Select the + icon under the name of the appropriate term.

2. The degree requirements that are still needed are listed. Browse through the list or use the Subjects drop-down and Search by title field to search for a specific course. You can also select Courses if you would like to search from all courses.

3. You may need to select the down arrow to expand a section. Select the check boxes for all of the courses you would like to add to the plan.
4. Scroll to the bottom of the window. You will see the courses you have selected. Select the X next to the course if you no longer want to add it to the plan. Select Add to Plan.

5. All of the courses will be added under the appropriate term.

**REVIEW PLAN**

If your advisor has made your plan active, then the template will track whether you are on track or off track. Review the plan to determine whether your registration is “on-track.” Under the course name you will see, “On-track” or “Warning.”

**On-track** designates that you have met the requirement. **Warning** designates that you have not met the requirement (not taken, failed, withdrawn, etc.)
MODIFY THE PLAN

You may need to make adjustments to the plan you created or the template you chose.

Reassign Requirements
You can move requirements between terms by selecting the requirement, then dragging and dropping it into the appropriate term.

You can also select the ellipsis for the requirement then select Reassign this requirement.

Reassign or Delete a Term
You can reassign or delete an entire term at once. Select the ellipsis for the term then select Delete this Term or Reassign this term.

Edit or Delete Requirements
Select the ellipsis for the requirement then select Edit this requirement or Delete this requirement.
**PLANS**

**Add a Note**
You can add a note to a plan, a term, or a course.

1. Select **note icon**.

![Add a Note 1](image1.png)

2. Select **Add a New Note**.

![Add a Note 2](image2.png)

3. Enter the note in the Description field. Select **Save Note**.

![Add a Note 3](image3.png)

4. Once a note is added the note icon color changes from gray to blue on the plan.
PLANS

PLANNER AUDIT

The Audit allows you to view the requirements that are satisfied by the plan you created. This differs from the traditional degree audit because it includes the courses you plan to take, not just the current or past courses you have taken. Note: A choice requirement with the @ symbol will not appear as planned on the Audit View.

1. At the top left corner of the plan, select Audit.

2. The Planner Audit will appear. Degree progress shows the percentage of Requirements and Credits fulfilled by the courses taken and planned. Note: Progress will not equal 100% until all of the courses are complete and graded.

3. Review the audit to ensure the plan matches the course requirements needed to graduate. Requirements that are in-progress or planned for are denoted by a blue half filled circle. PLAN will be listed under the Grade column and the planned term is listed under the Term column.

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Grade</th>
<th>Credits</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECON 04192</td>
<td>INTRO ECON-MICROECON</td>
<td>B</td>
<td>3</td>
<td>Fall 2020</td>
</tr>
<tr>
<td>ECON 04101</td>
<td>INTRO ECON-MACROECON</td>
<td>B-</td>
<td>3</td>
<td>Spring 2021</td>
</tr>
<tr>
<td>MATH 03125</td>
<td>CALC TECHNIC/APPLIC</td>
<td>B</td>
<td>3</td>
<td>Spring 2021</td>
</tr>
<tr>
<td>STAT 02260</td>
<td>STATISTICS I</td>
<td>R</td>
<td>(3)</td>
<td>Fall 2022</td>
</tr>
<tr>
<td>STAT 02261</td>
<td>STATISTICS II</td>
<td>PLAN</td>
<td>(3)</td>
<td>Spring 2023</td>
</tr>
</tbody>
</table>
PLANS

4. Requirements that have not been completed or planned for are denoted by a red circle. Add these courses when modifying the plan.

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Grade</th>
<th>Credits</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Environment of Business MGT 98242</td>
<td>LEGAL ENVIRONMENT</td>
<td>D</td>
<td>3</td>
<td>Spring 2022</td>
</tr>
<tr>
<td>Organizational Behavior MGT 06300</td>
<td>ORGANIZATIONAL BEHAVIOR</td>
<td>PLAN</td>
<td>(3)</td>
<td>Fall 2023</td>
</tr>
<tr>
<td>Principles of Finance FIN 04300</td>
<td>PRINCIPLES OF FINANCE</td>
<td>PLAN</td>
<td>(3)</td>
<td>Spring 2024</td>
</tr>
<tr>
<td>Operations Management MGT 06305</td>
<td>OPERATIONS MGMT</td>
<td>PLAN</td>
<td>(3)</td>
<td>Fall 2023</td>
</tr>
</tbody>
</table>

Still needed: 1 Class in MGT 06402

5. Review the Additional Courses Applying to Credit Total block. This block lists any courses that are not currently used to fulfill specific degree requirements. Ideally, you do not want the courses that you planned for to appear in this block. If any of your planned courses are applying in this block, please review these courses with your advisor before registering. An exception may be needed or a different course may be more appropriate.

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Grade</th>
<th>Credits</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHEM 05100</td>
<td>ESSENTIALS OF GEN CHEMISTRY</td>
<td>PLAN</td>
<td>(3)</td>
<td>Spring 2023</td>
</tr>
</tbody>
</table>
PRINT VIEW

The Print View condenses the plan and displays the course titles. You can use the print view to either print the plan or save it as a PDF.

1. At the top right corner of the plan, select the **Print Icon**.

2. The Print View will open in a new tab. You will see all of the semesters and courses you added to the your plan. Select the **Print Icon** to save the plan as a PDF or to print it.
3. Use the Destination drop-down menu to select **Save as PDF** or select the **printer name**.

4. Select **Save** or **Print** at the bottom of the screen.