Valdosta State University   Degree Works™ Advisor Guide

Plans Tool
Student Educational Planner (SEP)

With the **Degree Works**[TM] **Plans** tool, advisors can create academic plans based on a student's future academic goals. Pre-defined plans, or templates for particular programs of study, can be created ahead of time and loaded for student advising. Once a plan is populated, it can be modified as needed, including adding relevant notes. You can also run Audits for a plan to check the student's progress against the plan to ensure timely degree completion.

For additional assistance, contact:
VSU Solutions Center
229-245-4357

-or-

Email: degreeworks@valdosta.edu

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View Existing Plans

Select a student and plan

1. In the **Student ID** field, enter the student's **VSU Banner ID** (870#) and press **Enter key** on your keyboard; or click the **Find** icon to search for a student.

2. Click the **Plans** tab. A list of existing plans is displayed.
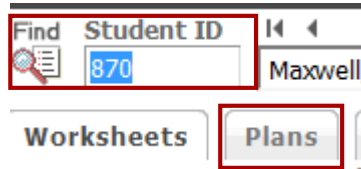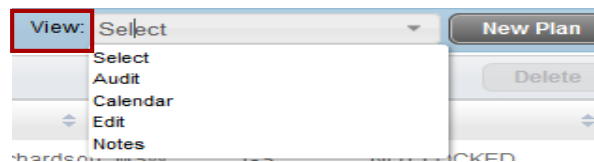

ⓘ **If no plan exists, you will be prompted to <u>create one from scratch</u> or <u>use a template</u>. . .**

View plans

A plan can be opened in the following views: **<u>Audit</u>, <u>Calendar</u>, <u>Edit</u>,** and **<u>Notes</u>**.
Select plan > Select from the **View drop-down list** located to the right on the blue bar.

Audit view: Displays a side-by-side view of a degree report on the left side and a high-level view of a plan on the right side. The audit processes the coursework against the requirements associated with the student's degree data. Progress is displayed in terms of the percentage of requirements and hours completed. *Completed, not completed, in-progress, and transfer classes* are also listed. Future course and placeholder requirements are also included.

Courses that are required but have not been taken yet are listed as *Still Needed.*
1. **Drag and drop** Still Needed courses from the audit to the appropriate term on the plan.
2. Click the **Refresh Audit** button to run the audit again against the updated plan.
ⓘ The Edit view should be used for more advanced editing of the plan.

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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: Provides a detailed view of the plan and allows for advanced modifications to the plan. This view is used when creating a plan from scratch or editing an existing plan or template plan. **View Create a Blank Plan section for more detail.**

Notes view: Provides a high-level view of the plan with associated plan, terms, and requirements notes. Courses, requirements, minimum grade, and credits are also listed.

- Click **Show all notes** toggle button to see requirements, terms, and plan.
- Click **Hide all notes** toggle button to collapse all the note text.
- Click the **Audit** button to run a degree audit against the plan.
- Click **Print** button to print.

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Create a Blank Plan

Name plan and add term(s)

1. If no plan exists, select **Blank Plan** when prompted.
    If a plan exists, click **New Plan** button located in upper-right corner > **Blank Plan**.
    You are now in Edit View.

2. Enter a **Description**. (i.e., Finance-BBA)
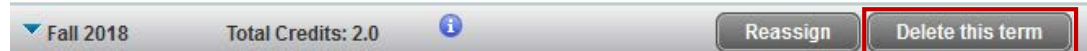
3. If necessary, select the **Degree** to which this plan applies from the drop-down list.

4. Optionally, select the **Active** check box to indicate student is following this plan.

5. Select the **Locked** check box to prevent other users from editing the plan. *You can lock the plan after it has been approved. Once locked, students can still access and save plans, but they must request changes be reviewed by an advisor who will then lock the updated plan when it is approved.*

6. Click the **Plus** ➕ sign to select a Term(s) from the drop-down list.

Description:	Practice Plan	☐ Active ☐ Locked	⏫ ➕ 📄
Degree:	Master of Social Work ▾	Level: Graduate-Semester	

Delete a term after adding it to a plan, by clicking the **Delete this term** button > click **OK**.

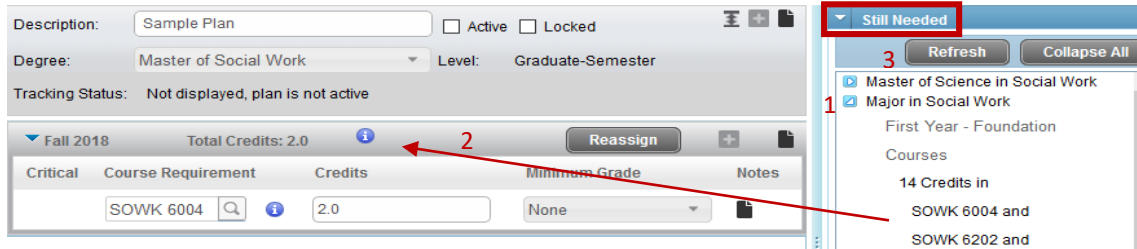| ▼ Fall 2018	Total Credits: 2.0 ⓘ		Reassign	Delete this term

Add term requirements

As needed, add Requirements for each term on the plan.
Types of requirements: **Course**, **Choice**, **GPA**, **Test Score**, **Non-Course**, and **Placeholder**

Add a Course requirement:

*There are multiple ways a course(s) can be added to a term:*

a. **From the Still Needed List:** Located on the right side of the plan, the **Still Needed** pane contains the remaining requirements from the student's Degree Works™ Audit blocks.

    1. Click the **Arrow** to the left of the title to expand a block.
    2. **Drag the course** to the gray bar of the term when the course is to be completed.
    3. Click the **Refresh** button to update the Still Needed list as you add required courses to the plan.

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Default course name and credits will be added to the term.

b. **From the Courses List (Course Catalog):** Located on the right below the Still Needed pane, the **Courses** pane pulls data from the course catalog.

1. Click the **Arrow** to the left of the subject code to find a course.
2. **Drag the course** to the gray bar of the term when the course is to be completed.
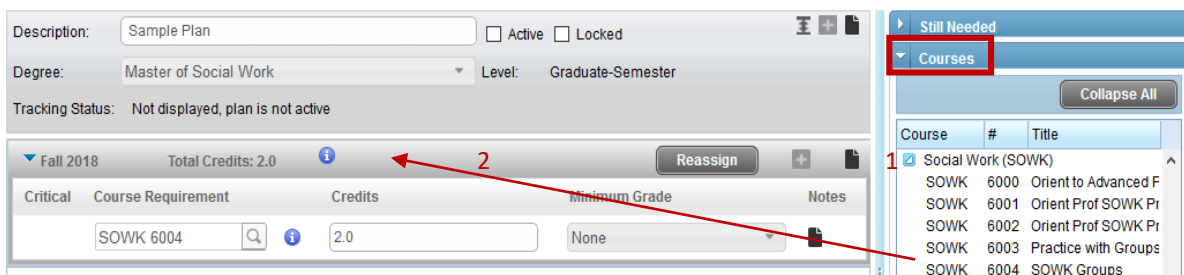
c. **From the Add Requirement Menu:**

1. Click the **Plus** sign to the far right on the gray term bar > Select **Course** from the list of requirement types.

2. Either type in the **Course ID** or click the **Magnifying Glass** icon to search for and select a course in the catalog based on the **Course ID or Title**.
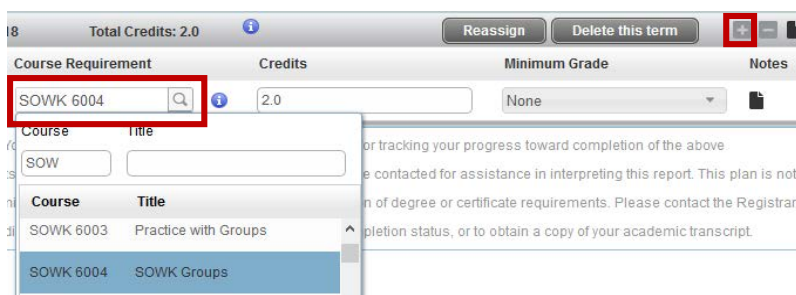
ⓘ To see more information about a course after it is added to the plan, with the option to print, click the blue circle **Info icon** ⓘ to the right of the course.

ⓘ To delete a course, click the **Minus** sign to the far right on the gray term bar.

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Add a Choice requirement:

Used to add several courses or a range of courses as a single group requirement.

1. Click the **Plus** ⊞ sign to the far right on the gray term bar > Select **Choice** from the list of requirement types > Click the **Ellipses** ⋯ icon.

2. Type the **Course ID** or click **Magnifying Glass** icon to search for course.

   As appropriate, add **Attributes** from the dropdown list.

   To insert an OR condition, click the **Add another option** button in the lower left corner > **Type ID or search for course**.

   To insert an AND condition (paired course, lecture/lab), click the **Plus** ⊞ sign to the right of the first chosen course.
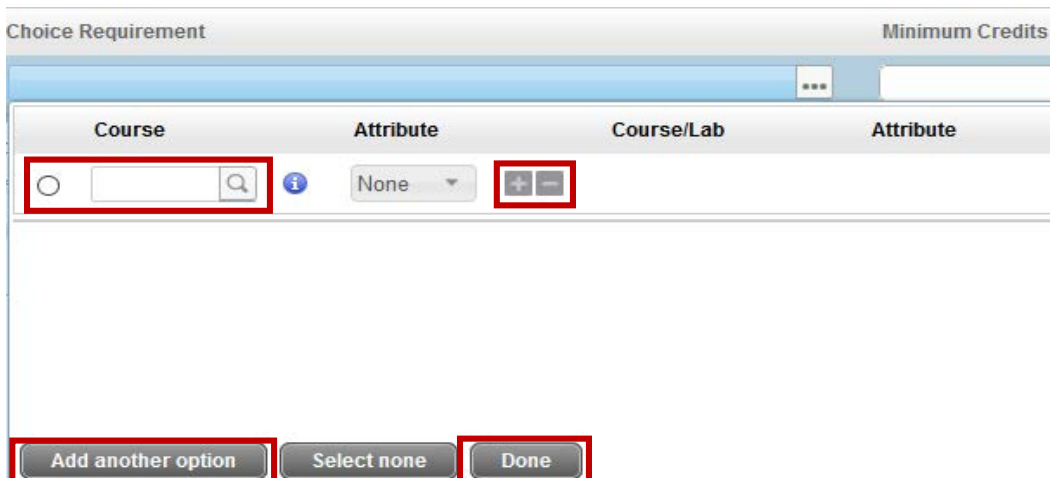
   ⓘ Choice requirements may only contain up to two linked courses (AND condition) in a single line. There is not a limit to OR conditions.

   ⓘ Unless a specific course is chosen, courses added as a Choice requirement are not removed from the Still Needed list nor appear in the Audit.

   Click the radio ◯ **button next to desired course to select it.**

   ⓘ Click the **Minus** ▬ sign to delete a course.
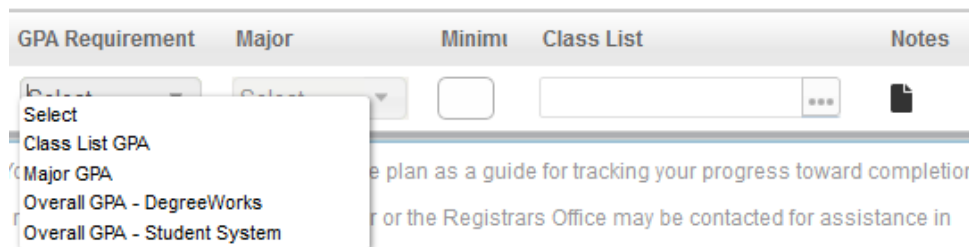
3. Click the **Done** button when you are finished adding choices.

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Add a GPA requirement:

1. Click the **Plus** [+] sign to the far right on the gray term bar > Select **GPA** from the list of requirement types.

2. Select the type of GPA from the **GPA Requirement drop-down list**:
   a. **Class-List GPA**: *Specify a list of classes and the minimum average GPA for that list.* (**Click the Ellipses** ••• **icon to type in the class names.**)
   b. **Major GPA**: *Specify a major and a minimum GPA for that area of study*. (**Select major from the Major drop-down list.**)
   c. **Overall GPA - Degree Works**: *Specify the minimum overall GPA as calculated by Degree Works.*
   d. **Overall GPA - Student System**: *Specify the minimum overall GPA as calculated in the student system (Banner).*

3. Enter the minimum GPA required in the box under **Minimum GPA**.

GPA Requirement	Major	Minimu	Class List		Notes
Select	Select			•••	📄
Select					
Class List GPA					
Major GPA					
Overall GPA - DegreeWorks					
Overall GPA - Student System					

e plan as a guide for tracking your progress toward completion
r or the Registrars Office may be contacted for assistance in

Add a Test Score requirement:

1. Click the **Plus** [+] sign to the far right on the gray term bar > Select **Test Score** from the list of requirement types.

2. Select a test from the **Test Score Requirement drop-down list**.

3. Enter the minimum score required in the box under **Minimum Score**.

Test Score Requirement	Minimum Score	Notes
Select		📄
Select		
A-Level Chemistry		
Praxis I - Math		
Praxis I - Reading		
Praxis I - Writing		

oward completion of the above requirements. Your academic advisor or the Registrars Office
script and it is not official notification of completion of degree or certificate requirements.
completion status, or to obtain a copy of your academic transcript.

ⓘ Test scores must be on the student's record in Banner to be considered on- track, with the appropriate score.

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Add a Non-Course requirement:

Used to add requirements that are not courses, scores, or GPAs--example, a music recital.

1. Click the **Plus** ➕ sign to the far right on the gray term bar > Select **Non-Course** from the list of requirement types.

2. Select the type from the **Non-Course Requirement drop-down list**.

3. Optionally, enter a value for the requirement inside the box under **Status.** *For example, for a music recital, you can record the status as completed.*

Add a Placeholder requirement:

Used to add requirements that cannot be categorized under the other requirement types.

1. Click the **Plus** ➕ sign to the far right on the gray term bar > Select **Placeholder** from the list of requirement types.

2. Enter text in the box under **Value**.

ⓘ A Placeholder is informational only and does not impact term units.

Delete a requirement from a term:

1. Click on the desired requirement to select it.

2. Click the **Minus** ➖ **sign** to the far right on the gray term bar.

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Reassign requirements between terms:

1. **Select the desired requirement** > **Drag and drop** to the desired existing term.

Reassign all term requirements:

1. Click the **Reassign** button on the term box.

2. Select the new term to reassign requirements from the drop-down list displayed on the far-left corner of the term box.
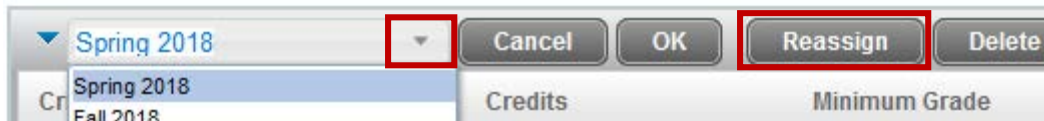
3. Click **OK**. *The new term is created and requirements are moved to that term. The old term is removed.*

ⓘ You cannot reassign all requirements from a term to an already existing term.

Add notes

1. Click the **Notes** icon to add notes to the Plan, a Term, or Term Requirement.
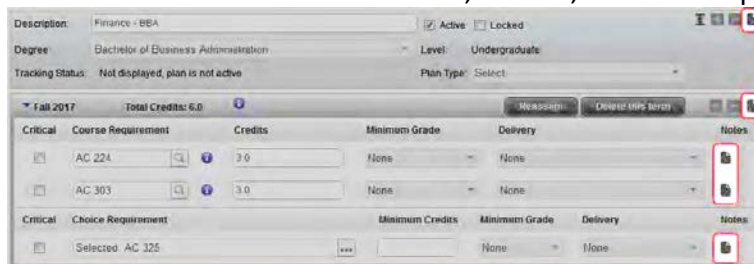
2. Click the **Add Note** button > **Type note** > Click the **Done** button.

ⓘ Once entered, the note icon will change from solid black to black with white lines to alert users that a note exists.

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Save plan

Modifications to a plan are not captured until the plan is saved.

Save

1. When finished editing, click the **Save** button in the bottom right-hand corner of the screen.
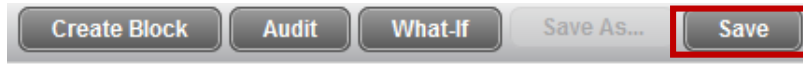
2. Click the **View Plan List** button.
   The plan will be displayed in the list of existing plans.

Save As

To make a copy of an existing plan:

1. In Edit view of the existing plan, click the **Save As** button in the bottom right.
   (If Save As is grayed out, edit the plan in some way; i.e., the Description.)

2. Click the **View Plan List** button.
   A newly created plan (copy) will be displayed in the list of existing plans.

Cancel

1. To **Cancel** a plan without saving any modifications, **do not click the Save button**.

2. Click any **Tab** (Worksheets, Plans, Notes, GPA Calc) at the top of the page to leave the edit mode of the Plans page without saving the plan.

ⓘ Select **Leave Page**, if prompted with a pop-up message asking "Are you sure? This page is asking you to confirm that you want to leave—data you have entered may not be saved."

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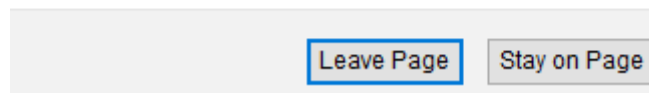
Create a Plan from a Template

Select template and start a term

1. If no plan exists, click **Select Template** when prompted.
   If a plan exists, click **New Plan** button located in upper-right corner > **Select Template**.

Search for a template by description:

1. Type a **keyword** (i.e., Social Work) in the **Search by Template Description box** located on the left side of screen > press the **Go** button or press **Enter** on your keyboard.

Search for template using advanced search:

1. Click the **Advanced Search** button located on the right side of the screen.

2. Click the dropdown arrow in the white box on the far right to select a filter(s) based on the corresponding Tag.
   a. To change/add a Tag, click the dropdown arrow on the gray box to make a selection.

3. Click the **Apply** button once all filters have been selected.

4. **Double-click** or **Click on the row to select desired template** > Click **Open**.

Add term:

1. **Select a starting term** from the dropdown > click **OK**.

ⓘ If the student has already started taking courses in this field, consider back-dating the starting Term to reflect when the student started.

Edit and finalize plan

See instructions provided in the "**Create a Blank Plan**" section.

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Planner Audits

Run an audit

To run an Audit for a plan while in the Edit, Calendar or Notes view:

1. Click the **Audit** button at the lower right corner of the page.
   The Audit is not saved in the system.

2. To print Audit, click the **Print** link at the top right corner of the Audit page.

Run a What-If audit

What-If audits allow you to process speculative degree audits for students using their current class history. A What-If audit can be run to see what the audit results would be if the major, minor, degree, or some other criteria were changed. For example, you can select a different degree as a criteria and run a What-If audit to see what percentage of the courses already completed by the student are valid towards the new degree.

In the Edit view of a plan:
1. Click the **What-If** button at the lower right corner of the page.

2. Select desired criteria from the drop-down list.
   Ensure that only valid combinations are selected. For example, if the Anthropology major can only be completed in the Arts & Science college, you will not be able to select "Anthropology" in the **Major** drop-down list box when some other college, for example the Business School, is selected in the **College** drop-down list.

ⓘ Click **Run Audit** button at the lower right corner of the page.
   The audit is not saved in the system.

ⓘ To print What-If Audit, click the **Print** link at the top right corner of the Audit page.

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