HOW TO CREATE A NEW PLAN

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REVISION HISTORY

Version	Date	Name	Description
1	2.16.16	Bracken	final

INTRODUCTION AND PURPOSE

Course plans are available to provide students' guidance towards completion of their degree requirements in a term based structure. This procedure document is intended to introduce users to Student Course Plans and show users how to assign a new plan from an already created template and/or how to create a new plan for a student from scratch.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

- 1. The Registrar's Office will maintain a template for each undergraduate major. Departments should contact the Registrar's Office regarding questions or changes to the templates.
- 2. The Graduate Division Academic Affairs office is not creating or maintaining templates for graduate students at this time. Departments can create and maintain their own templates, if needed.
- 3. Templates will be assigned to freshmen students prior to Orientation.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

- 1. Registrar's Office
- 2. Graduate Division Academic Affairs Office
- 3. College Offices
- 4. Academic Departments

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Degree Works (https://degreeworkstest.ucr.edu//) to follow along.

FORMS

The degree audit is located within Degree Works. There are no forms in Degree Works.

PROCEDURES

PREPARATION

Plans can be created in one of two ways: it can be based on a template for specific terms or created from scratch by starting with a blank plan.

ASSIGNING A PLAN BASED ON A TEMPLATE

STEPS

1. First **search** for and **select** a student in the Degree Works interface. Be mindful of the student you choose to create a plan for during this training, as you will be asked to use this same student in the following Degree Works Course Plan Procedures.



2. Go to New Plan.



- 3. A new window will open prompting you to create a new plan. If the student doesn't have any plans assigned to them, you will be automatically prompted to create a new plan when you go to the Plans tab. Click on **Select Template**.
- 4. Templates are created by the Registrar's Office in collaboration with the department. A template becomes a "plan" once it has been assigned to a student.

Create Plan	8								
Would you like to create a p would you like to s	Would you like to create a plan based on a template or would you like to start from scratch?								
Blank Plan	Select Template								

5. A list of templates will show. **Tip**: You can use the arrows on each column to sort the templates.

Browse Templates												
Search by Template Description 60	Filter:										Advanced Sear	th
Open												
Description	÷ Level	¢ College	¢ Major	‡ Degree	Catalog Year	÷.	Term Scheme	÷ U	¢ Who ¢	What	Modified	0
Anthropology Law & Society	U	HS	ANLW	BA	2015		COMPLETE_SCHEDULE	QUAR1 T0000026	chavez, cindy	NOT SET	11/20/15	^
Art	U	HS	ART	BA	2015		COMPLETE SCHEDULE	QUAR1 T0000033	chavez, cindy	NOT SET	11/23/15	
Art History	U	HS	AHS	BA	2015		COMPLETE_SCHEDULE	QUART T0000023	chavez, cindy	NOT SET	11/20/15	
Art History Heligious Studies	U	HS	AHRS	БА	2015		COMPLETE_SCHEDULE	QUART TUUUUUZZ	chavez, cindy	NOT SET	11/20/15	
Art History/Administrative Studies	U	HS	AHAT	BA	2015		COMPLETE_SCHEDULE	QUAR1 T0000021	chavez, cindy	NOT SET	11/20/15	
Asian American Studies	U	HS	ASST	BA	2015		COMPLETE_SCHEDULE	QUAR1 T0000027	chavez, cindy	NOT SET	11/4/15	
Asian Studies	U	HS	AST	RA	2015		COMPLETE_SCHEDULE	OLIAR1 TODOOD28	chavez, cindy	NOT SFT	11/4/15	
Biochem (Biology Emphasis)-Math Placement 008A or 005	U	NA	BCH	BS	2015		FALL_START_WITH_SUN	IMER_ T0000138	Giron, Mayeta	NOT SET	12/10/15	
Biochem (Biology Emphasis)-Math Placement 008B 009A	U	NA	BCH	BS	2015		COMPLETE_SCHEDULE	QUART T0000139	chavez, cindy	NOT SET	12/8/15	

6. You can search for a template by Description, simply enter a word or partial string that appears in the template description and click **Go**.

Browse Templates							
asian	×	G0	Filter:				
Open	Description		÷	Level	÷	College	
Asian American Studies	i.		U	le.		HS	ASST
Asian Studies			U	I.		HS	AST

7. You can also search using filters, to do this click on the Advanced Search button.



8. The search window will appear below. As a default, required Template Tags initially display in the Advanced Search window. Template Tags consist of Level, College, Major, Degree, and Catalog Year. Additional Template Tags can be added by clicking Add Another Tag. Tags that are not used in your search can be removed by clicking on the "X" icon.

Filter:		Advanced Search	
Level	¥		1
College	*		L
Major	*	· · · · · · · · · · · · · · · · · · ·	L
Degree		· · · · · · · · · · · · · · · · · · ·	L
Catalog Year		· · · · · · · · · · · · · · · · · · ·	L
Add Another Tag			1
			2
		Clear Cancel Apply	J

9. Select the tags you want to use in your search and the values from the drop-down lists.

Filter:			Advanced Search
Level	*	(U, Undergraduate)	
College	٣	(HS, Humanities, Arts, and Soc Sci)	· · · · · · · · · · · · · · · · · · ·
Major	*	(ASST, Asian American Studies), (ALC, Asian Literatures and Culture), (AST, Asian Studies)	· (
Degree	٣		· · · · · · · · · · · · · · · · · · ·
Catalog Year	*		· · · ·
Add Another Tag			

10. When you click the drop-down list for the values a new box will appear. Multiple values can be selected for filtering by checking more than one box. All selected values can be cleared by clicking **Clear**.

ociect option	
AHRS	Art History/Religious Studies
ASST	Asian American Studies
ALC	Asian Literatures and Culture
AST	Asian Studies
BCH	Biochemistry
BCMB	Biochemistry and Molecular Bio
BIEN	Bioengineering

11. To filter based on selected Template Tags, click **Apply**. To go back to the template list, click **Cancel**.

Filter:			Advanced	Search
Level	*	(U, Undergraduate)	•	
College	v	(HS, Humanities, Arts, and Soc Sci)	*	
Major	*	(ASST, Asian American Studies), (ALC, Asian Literatures and Culture), (AST, Asian Studies)	÷.	
Degree	×		¥	
Catalog Year	*		*	
Add Another Tag			Clear Cancel	Apply

12. Once you have found the template you would like to assign to the student, select the template by double-clicking on it or highlighting it and then click **Open.**

Browse Templates																			
aslan	1	60	Filter:														1	Adve	nced Search
Open 🥠																			
1999	Description			Level	: Col	lege) ÷		Major	 Degree :		Catalog Year	11.	Term Scheme	ID	45	Who :	What	10	Modified 3
Aslan American Studies				U	HS	1	ASST		BA	2015			COMPLETE_SCHEDULE_DUA	RT T000002	t ch	avez, cindy	NOT SET	H	10015
Asian Studies				Ų	HS	1	NST		BA	2015			COMPLETE_SCHEDULE_QUA	RT 7000002	e ch	uivez, cindy	NOT SET	- 0	11/4/15

13. You will be asked to select a start term for the plan. Choose a start term from the drop-down menu that represents when the student started at UCR.

Select a starting Te	erm	8								
Please select a Term to serve as your starting term for this plan										
Start Term*	Select	Ŧ								
	Fall 2011 Fall 2012									
Cancel	Fall 2013 Fall 2014									
BA	Fall 2015 Fall 2016									
BA	Fall 2017 Fall 2018									
BA	Fall 2019									
BA	Fall 2020									

- 14. Only Fall quarter options are available for templates. Note: currently all templates created have a Term Scheme of Fall start. A Term Scheme determines the basis for a template and what its starting term will be.
 - a. If a student is not starting as a freshman in the fall quarter or major changes into your program after the first quarter, term modifications may be required.
 - 1. You may use a template and then use the **Reassign** or **Add/Delete** a term options.
 - 2. Alternatively, you or the student can build a plan using the **Still Needed list**. In many cases you may find this to be the most efficient way due to each student's unique status coming in to the major.
 - 3. If your department experiences a high volume of major changes <u>and</u> you are able to establish common course plan templates that start in alternative quarters, please reach out to the Registrar's Office and we can discuss templates with a Term Scheme that is not fall quarter. Although this might sound like the best option, it will not assist you if most students come in to your major with various requirements still to complete. This then prevents the ability to create a common template.
 - b. Please see *How to Modify an Assigned Course Plan* for more information on reassigning or adding/deleting a term.
- 15. The plan will display with the terms listed according to the term scheme of the template, and with the requirements and notes for each term displayed.
- 16. If you don't want this plan to be the primary plan do not select active and/or locked.
 - a. A primary plan should be one that is currently being used by both advisor and student to meet the student's academic goal.
 - b. If the incorrect plan is marked as active/locked, the student/advisor may be following the wrong course plan.
 - c. An active and locked course plan displays to the student in the Term Plan and Registration screens of self-service.
- 17. Name a student's plan under **Description**
 - a. By default, the description will show the name of the template selected. Keep this description. For example, "Asian American Studies" will appear and then you can add a modifier after the major.

b. Remember to **save** the Plan. Saving the plan also means it has been assigned to the student and you can begin to make modifications and/or make this new plan active/locked. Please see policies and procedures on *How to Modify an Assigned Course Plan.*

ASSIGNING A PLAN FROM SCRATCH

STEPS

1. Go to New Plan.



2. To create a new plan from scratch, select Blank Plan.

Create Plan	8	
Would you like to create a plan based on a template or would you like to start from scratch?		
Blank Plan	Select Template	

3. A New Blank Plan is displayed.

Worksheets	Plans Notes Exceptions GPA Calc				
Student Planner fo	or			View: Edit	
Description:		Acti	ve 📃 Locked		
Degree:	Bachelor of Arts *	Level:	Undergraduate		
Tracking Status:	Not displayed, plan is not active				
Disclaimer:You a	re encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements	Your acad	emic advisor or the Registrar's Office may be contacted	for assistance in interpreting this report. This	
plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements, Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy					
of your academic	transcript.				

- 4. Begin by naming a Student's new Plan under **Description**.
 - a. The advisor creating a plan should follow the same naming convention as the templates. The name of the plan should be the major's name. For example, "Asian American Studies" and can have a modifier following it.
 - b. A description is required and can be up to 80 characters long with spaces.

Description:	Asian American Studies
Degree:	Bachelor of Arts

 If you don't want this plan to be the primary plan do not click active and/or locked. Note: The Degree and Level automatically populate and cannot be changed.

Description:	Asian American Studies	Active 🗖 Locked	
Degree:	Bachelor of Arts	Level: Undergradua	ite

- 6. **Requirements** on a blank plan must be entered term by term.
 - a. To **add** a term click on the 🔤 icon, located on the plan's header.
 - b. To **delete** a term, highlight or select the term and click on 🔤 icon located on the header.

Description:	Asian American Studies	
Degree:	Bachelor of Arts *	Level: Undergraduate

- 7. For further instructions on adding/deleting/editing requirements please see policies and procedures on *How to Modify an Assigned Course Plan.*
- 8. Remember to save the Plan if you would like to see it on the student's list of plans.

FINAL QUIZ

- 1. Plans can be created in one of two ways: it can be based on a template for specific terms or created from scratch by starting with a blank plan.
 - a. TRUE
- 2. A template becomes a "plan" once it has been assigned to a student.
 - a. TRUE
- 3. If you want the plan to show on the student's self-service you just need to lock it.
 - a. FALSE, a plan must be active and locked to show in self-service