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.

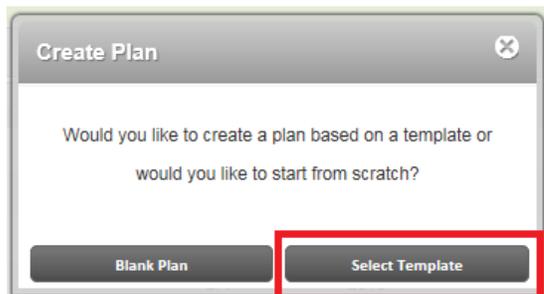## ASSIGNING A PLAN BASED ON A TEMPLATE

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.

Find | Student ID

2. Go to **New Plan**.

| Worksheets | Plans | Notes | Exceptions | GPA Calc |

Student Planner for: View: Select...   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.
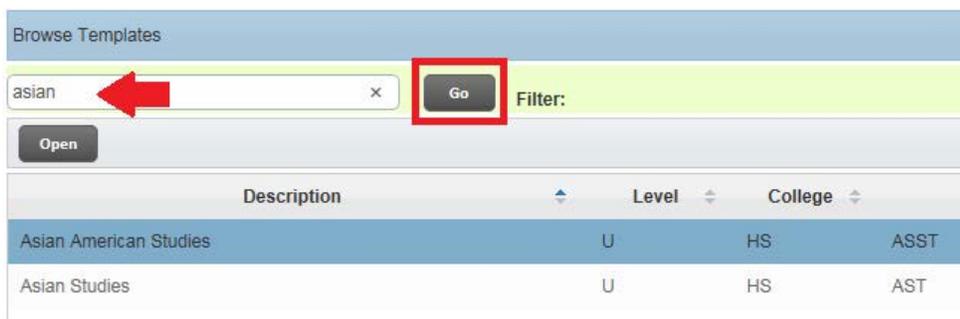
Create Plan   ⊗

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.

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**.

7. You can also search using filters, to do this click on the **Advanced Search** button.
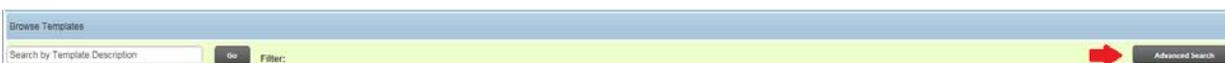
8. The search window will appear below. As a default, required Template Tags initially display in the Advanced Search window. Template Tags consist of Level, College, Major, Degree, and Catalog Year. Additional Template Tags can be added by clicking **Add Another Tag. Ta**gs that are not used in your search can be removed by clicking on the "X" icon.
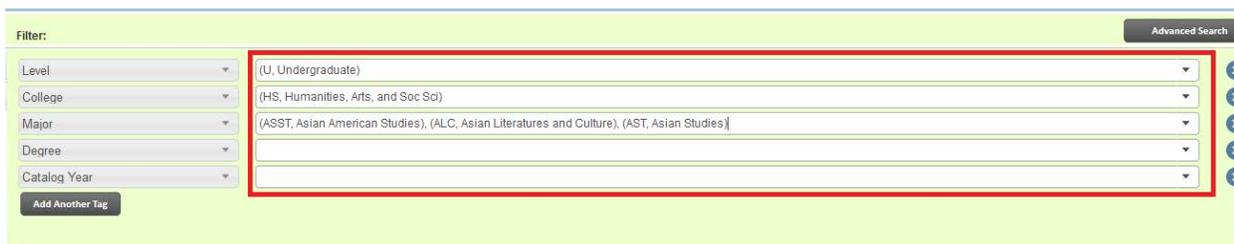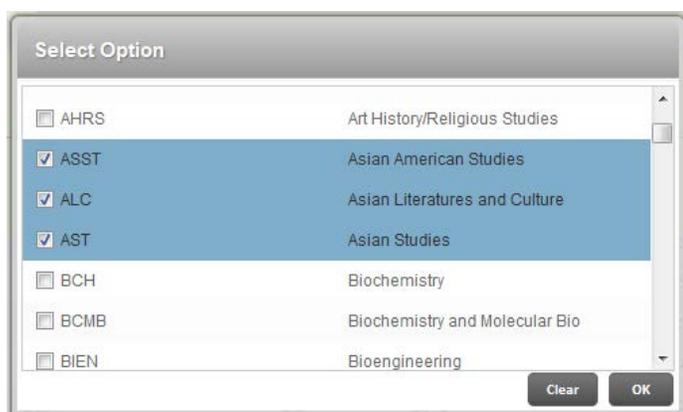
9. Select the tags you want to use in your search and the values from the drop-down lists.

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**.

11. To filter based on selected Template Tags, click **Apply**. To go back to the template list, click **Cancel**.
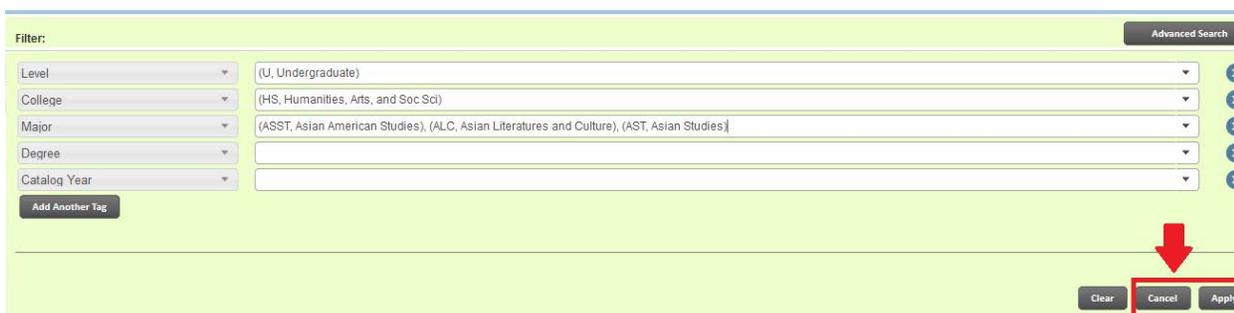
12. Once you have found the template you would like to assign to the student, select the template by double-clicking on it or highlighting it and then click **Open.**
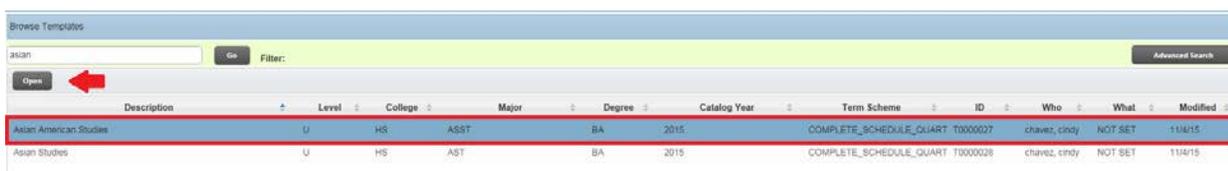
13. You will be asked to select a start term for the plan. Choose a start term from the drop-down menu that represents when the student started at UCR.

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.*
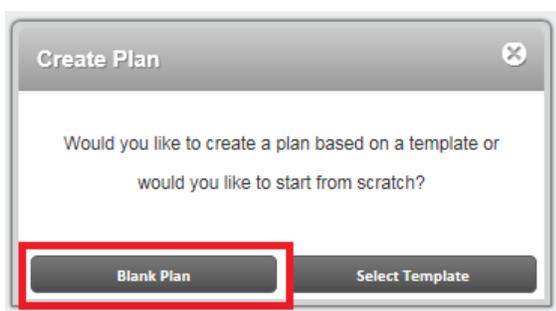
ASSIGNING A PLAN FROM SCRATCH
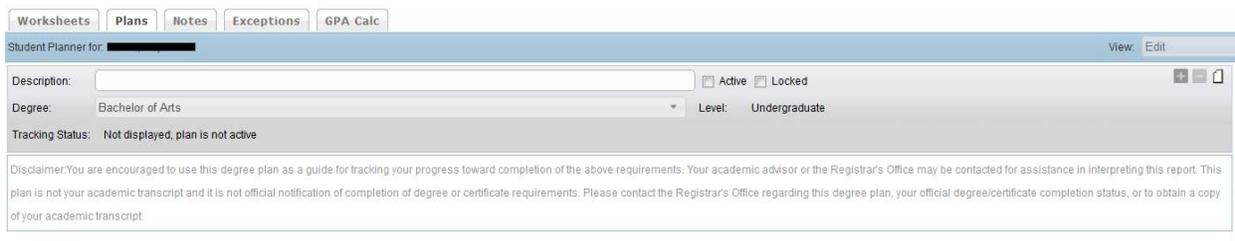
STEPS

1. Go to **New Plan**.

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

3. A **New Blank Plan** is displayed.

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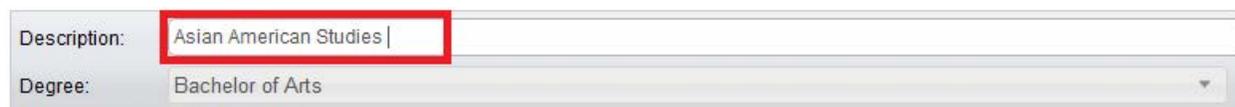
5. If you don't want this plan to be the primary plan do not click active and/or locked.
   Note: The Degree and Level automatically populate and cannot be changed.

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.

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