HOW TO MODIFY AN ASSIGNED COURSE PLAN

TABLE OF CONTENTS

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. This training will show users how to navigate and modify a student's already assigned Course Plan in Degree Works.

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.
4. A student may modify and save an "active" plan.
5. A student may not modify and save a plan that has been "locked". They may modify and save a copy of a plan that has been "locked".
6. Notes on plans should not be deleted unless they are true errors. This provides a record of information shared to the student and is part of the student record.

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.
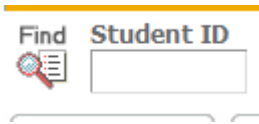
FORMS

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

PROCEDURES

ACCESSING STUDENT COURSE PLANS

STEPS

1. To access the plans for a student, first search for and select the student in the Degree Works interface. We recommend you use the student you created a plan for in *How to Create a New Plan*.

2. Then click on the **Plans** tab. A student's active plan will initially load with the default view. The default view is compact.

3. If the student does not have an active plan but does have at least one plan, the **List of Plans** will load initially in the Plans tab.
    a. Choose the plan you would like to modify by highlighting it, and select **Edit** from the **View** drop-down list.
    b. Note: in order to make modifications the **View** field must be on **Edit**.

4. **A student's primary plan should be "active" and "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. If the incorrect plan is marked as active/locked, the student/advisor may be following the wrong course plan.
   b. An active and locked plan displays in the Term Plan and Registration screens of the student's self-service.
5. **Active flag** indicates the Plan is current and in use.
   a. There can only be ONE active plan.
   b. A student may modify and save a plan that is "active"
6. **Locked flag** prevents the student from making changes to the Plan
   a. A student may not modify and save a plan that has been "locked", but they can modify it and then save a copy by clicking **Save As**. The Save As button is only activated after a change has been made to the plan.
7. Make the plan active and locked by checking the boxes and saving.


CHECK YOUR UNDERSTANDING

1. A student's primary plan should be active and locked.
   a. TRUE
2. A student can make changes to an active and unlocked plan.
   a. TRUE
3. A student cannot make changes to a locked plan but can use the "save as" function to save a copy and make changes to a copy of the plan.
   a. TRUE

HOW TO MODIFY A REQUIREMENT

A Student Plan can be edited term by term. Past, current, and future terms can be edited. You have the option to edit a requirement that is already on the student's plan, or you can delete that planned requirement and add a new one. An unlimited number of requirements can be added to any term.

1. To **edit** a planned requirement click on the field you want to modify.
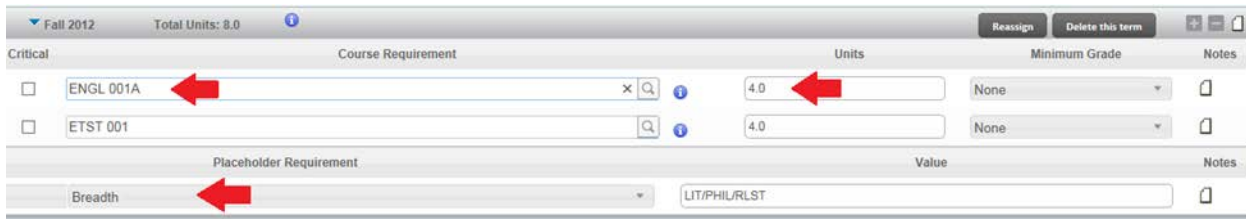
2. To **add a new requirement** use the ⊞ icon located on the term header. A drop down list of requirement types will display. There are four requirement types: Course, Choice, Non-course, and Placeholder. The four requirement types will be defined later in this document.

3. To **delete** a Requirement highlight the requirement and click the ⊟ icon located on the term header.
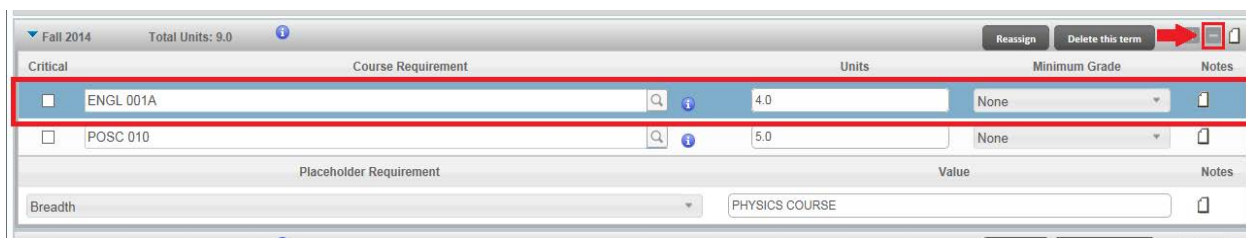
4. Requirements can also be moved from one term to another term by **dragging and dropping** them.

ADDING A COURSE REQUIREMENT

Course Requirement is used for a single course. There are three ways to add/edit a course in a course requirement. Enter the subject and course number in the text box, search for it, or choose the course from the Still Needed list.

STEPS

1. The first way to add a course is by **typing directly into the text box**. Enter the subject and course number.

   a. If the course is not valid a red error box will pop up indicating the error. In the example below the error is appearing because the leading zeroes on the course number are missing.

2. You also have the option to **search for a course** by clicking on the magnifying glass icon 🔍 .
   a. **Searching Tips -** For better results, enter as much information as possible. You may search using the subject, subject and course number, or title of the course.
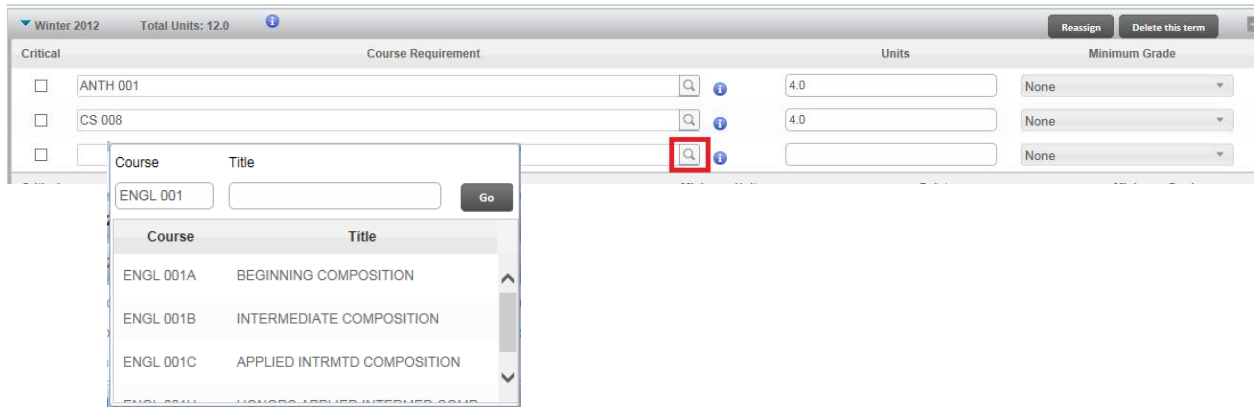

3. The last option for adding a course is by using the **Still Needed** list located on the right hand side of the Plan's page. The Still Needed List is a mini planner audit that shows only the requirements that are still needed to complete the plan's associated program.
   a. **Note**: You can create/assign any plan with any major/degree to the student's planner. However, the Still Needed list always displays requirements left based on what the student's **current** declared degree/major goal is, not based on the Plan's chosen degree/major.
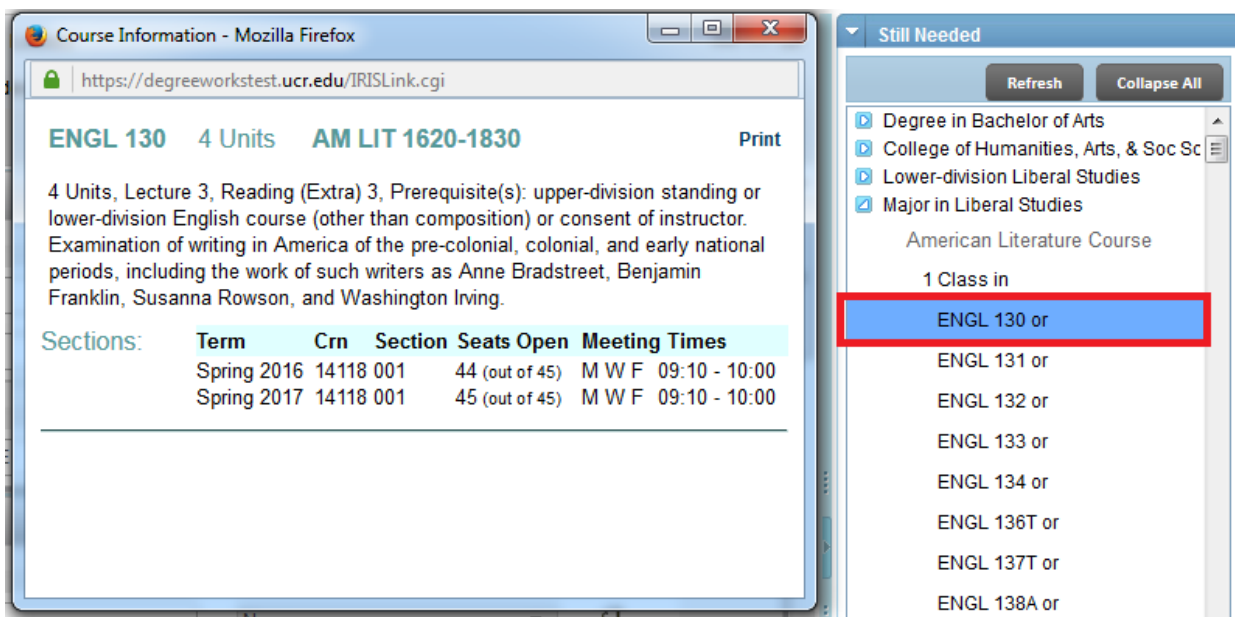

   b. If you hover over the courses in the Still Needed list, it tells you the title of the course and units.
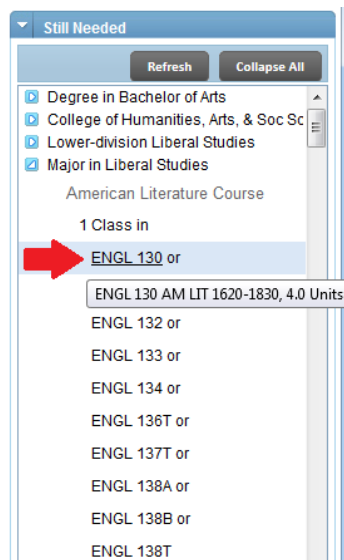
c. Remarks and proxy advice show when you hover over the header qualifier in the Still Needed box.
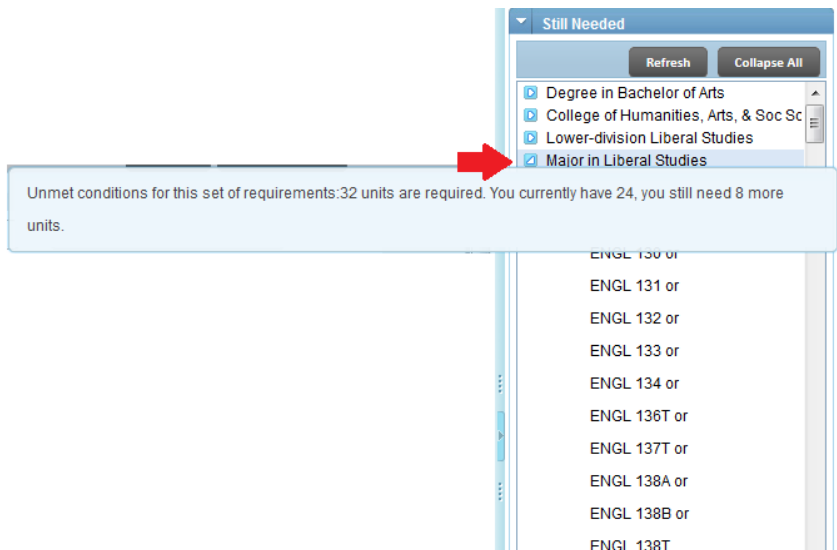
d. When you click a course, additional information such as the course description, meeting times, and prerequisites will display.

4. Once you have successfully entered a course in a Course Requirement, the **Units** automatically load from the course record in the database.

5. The units for the majority of the courses are fixed and cannot be changed. For multi-activity credit courses such as a lecture and discussion pair, you must add the unit value of the primary activity (the lecture). If you try to add a unit amount different than the approved units, you will get an error message. In the example below, a 2-unit value was entered, and the error displayed indicates that the value must be zero or 4. A 4-unit value must be entered.

Units
2.0

Units must be either 0.000 or 4.000   X

6. If the course is a variable credit course, then the maximum units for that course are displayed, and you can change the number of units to a value within the range for that course. In the example below, ANTH 184 varies in credits (4-16 units), the maximum number displays (16.0 units).

Course Requirement	Units
ANTH 184	16.0

If anything outside of that range is entered you will get an error message stating, "units must be between 4.000 and 16.000."

Course Requirement	Units	Minimum Grade
ANTH 184	17.0	Units must be between 4.000 and 16.000 X

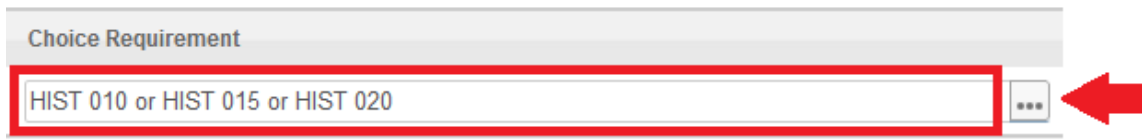7. A **Minimum Grade** can be assigned by choosing one of the drop-down options.

Course Requirement	Units	Minimum Grade
ENGL 001A	4.0	None

None
A+
A
A-
B+
B
B-
C+
C
C-
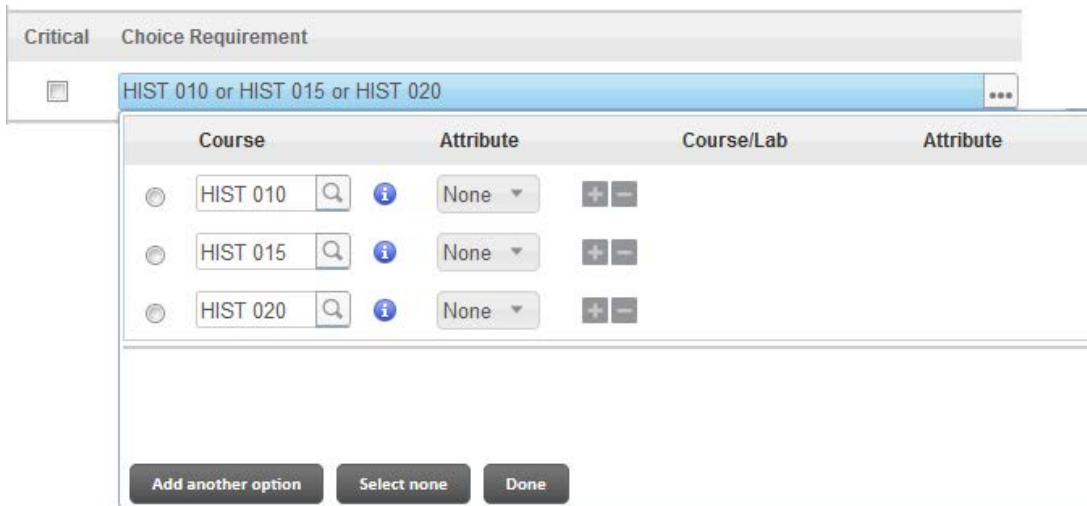D+
D
D-
F

ADDING A CHOICE REQUIREMENT

Choice Requirement is used when there are several course options that can fulfill a planned requirement.

STEPS

1. To add/edit a Choice Requirement click in the text box or the ⋯ icon.

2. A new window will pop up right below it.

3. Use the **Add another option** button to add an "OR" course to your choice requirement. For example, HIST 010 or HIST 015 or HIST 020.
4. An unlimited number of options can be defined.
   a. **Tip**: Don't click **Add another option** unless you have a course to add. If you keep adding a long list of options all at once this may slow down the system, you may get a message saying "Please be patient while we complete your request." Further, you may have blank options that will need to be deleted one at a time if there is no course to input.


5. Clicking on **Add another option**, adds another row below. You can add a course by typing the subject and course number directly into the text box, or you can search for it using the magnifying glass.
   a. An option can be any combination of actual courses such as MATH 101, wildcards such as @ @ (any course), Math @ (any math course), MATH 3@ (any MATH 300 level course), or ranges such as MATH 100:199.
      Tip: @ = wild card can be any subject, or any number.
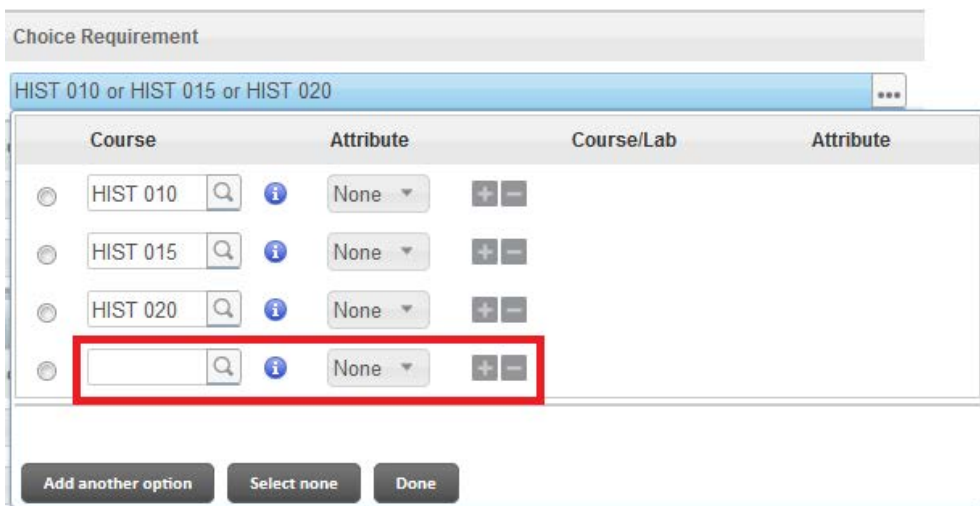
6. Use the ▭ icon to delete a course from your list of choices. This will immediately delete the entire row. In the example below, notice how the one row with HIST 020 is now gone.
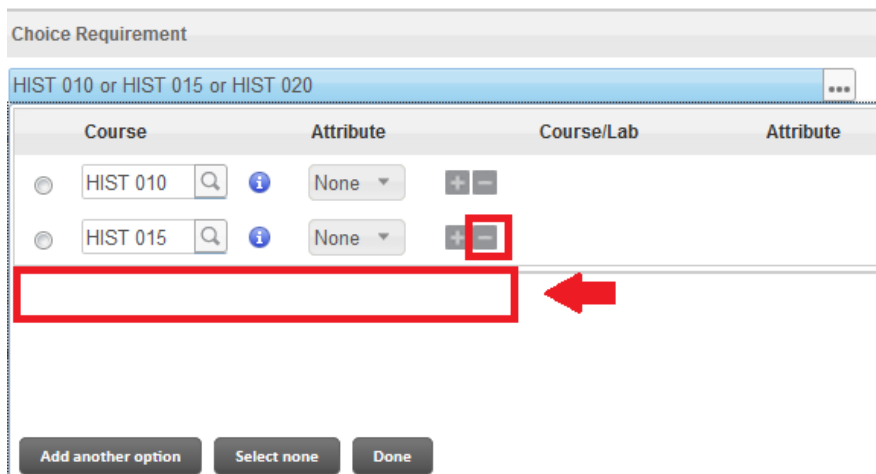
7. Click **Done** to save your changes.
8. Each option can have up to two courses. Use the ▥ icon to add an "AND" option to your choice requirement. This option is used to enter courses with labs where the course number is different, for co-requisites, or requirements where 2 classes must be taken to complete the option. For example, CHEM 001A and CHEM 01LA.
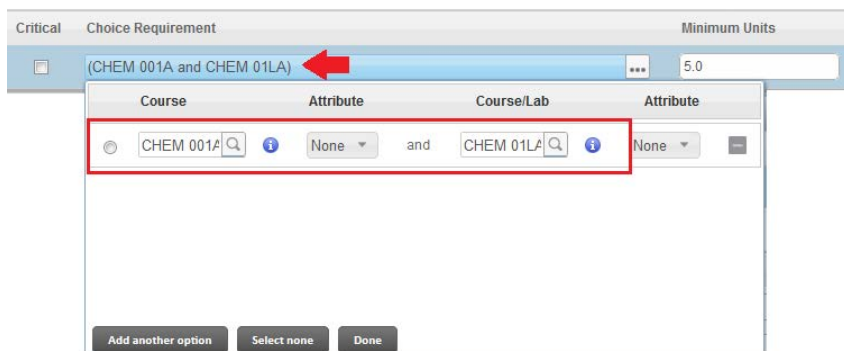
9. Attributes can be selected if known but are not required. The recommendation is to not use Attributes as they may confuse students. For instance, the attributes would appear to the student in self-service in the following format, @ @ with BBFA.

10. Once you have successfully entered the courses in the Choice Requirement, the **Minimum Units** must be entered/adjusted manually.

Choice Requirement		Minimum Units
(CHEM 01A and CHEM 01LA)	...	

11. A **Minimum Grade** can be assigned by choosing one of the drop down options.

Minimum Grade

None

None
A+
A
A-
B+
B
B-
C+
C
C-
D+
D
D-
F

CHECK YOUR UNDERSTANDING

1. Requirements cannot be dragged and dropped between terms in Edit view.
    a. FALSE, requirements can be dragged to a different term while in the Edit view.
2. How many different ways are there to add a Course Requirement to a plan?
    a. 1
    b. 2
    c. 3
    d. 4
        Answer: C
3. When adding a Course Requirement that has lecture and discussion activities the user should enter the units for the lecture, not the discussion.
    a. TRUE
4. When adding a Choice Requirement for any upper-division (100 level) Math course you can list it as "MATH @".
    a. FALSE, the requirement for any 100-level Math course is MATH 1@.

ADDING A NON-COURSE REQUIREMENT

Non-Course Requirement is used to add requirements that are not courses, but satisfies a major requirement. For Example, Language Requirement, Piano (keyboard) Proficiency, Research Project, Thesis etc.

STEPS

1. This option will only allow you to select from the drop-down menu.

2. Select an option and enter a **Status**. The **Status** can be left blank or it can also be the alphanumeric score or status needed to consider the requirement completed.

ADDING A PLACEHOLDER REQUIREMENT

The Placeholder requirement is a **user-defined** requirement that needs to be completed as part of the degree but a single course has not been identified.

STEPS

1. Select a Placeholder from the drop down list and add a **Value**.

2. The value can be any note that further explains the Placeholder. The Value should be in terms that are helpful to the student in understanding a requirement. This field is required. Please see below for examples.

ADDING OR DELETING/REASSIGNING A TERM TO A PLAN

STEPS - ADDING

1. If the student's plan only consists of a traditional three quarter per year term scheme, you have the option of adding a summer term.
2. To **add** a term, click on the ➕ icon located on the plan's header.

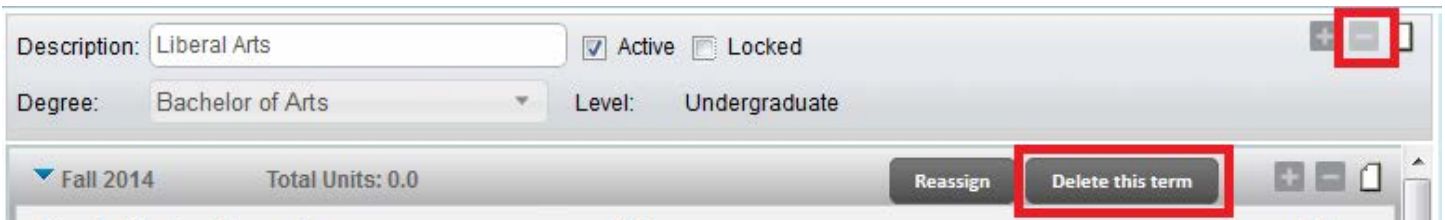3. A drop-down list of terms appears. Select the term you want to add.
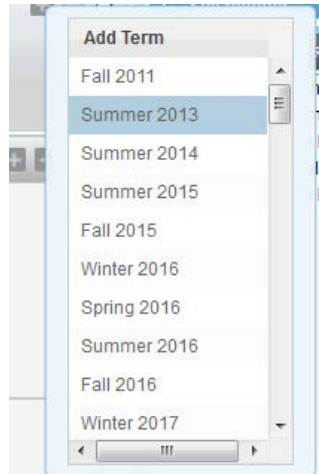
4. The term selected is now displayed and added to the plan in the order of academic year.
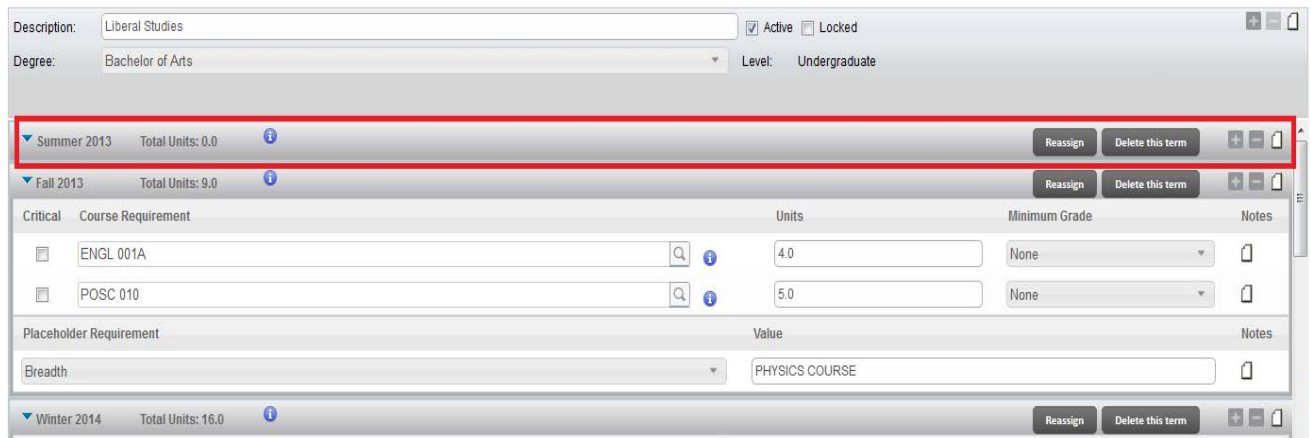
STEPS – DELETING/REASSIGNING

1. To delete a term, click on **Delete This Term** or select the term you want to delete by clicking anywhere inside the term block and then click on the ▬ icon located on the top header.
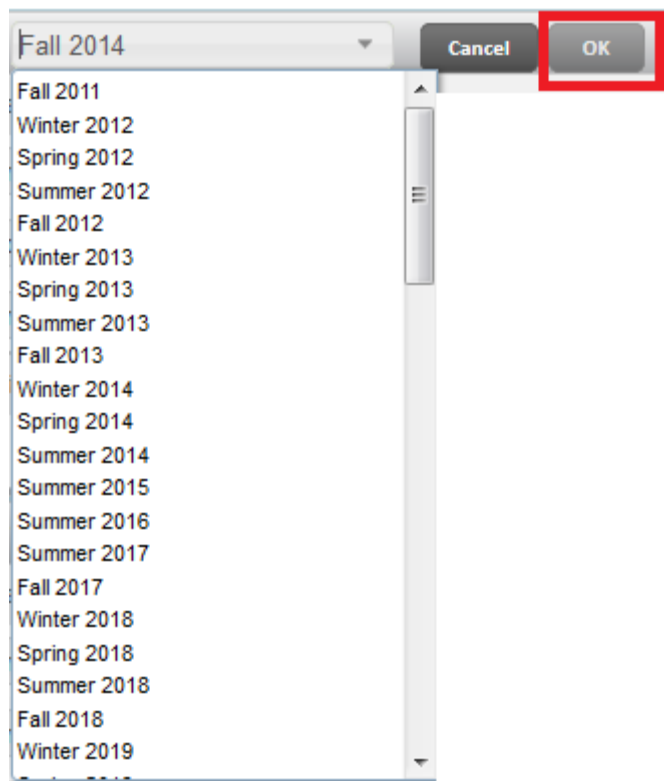

2. To **move the requirements** to another term, click on **Reassign** from the term block you would like to move.

3. The term now becomes a drop-down option and the Cancel and Ok buttons appear on the term header.

4. Choose the term you want to reassign it to from the drop-down list, and click **OK.** All requirements for that specific term will be reassigned to the new term selected.

5. All advisors will have access to delete a plan even if it is active and/or locked. Student users can only delete a plan if it is **not** locked. Click on the **Delete** button located on the footer of the Plan's page.
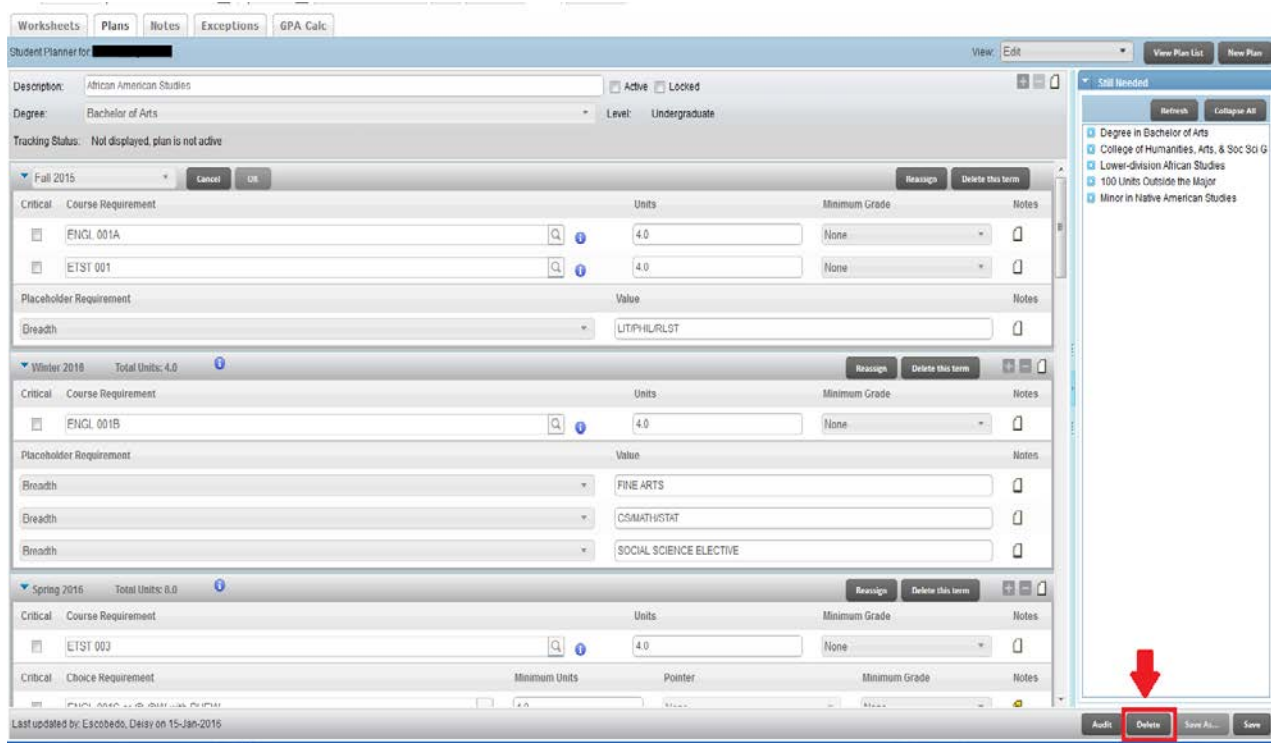
CHECK YOUR UNDERSTANDING

1. An example of a Placeholder requirement would be a breadth class.
    a. TRUE
2. An example of a Non-Course requirement is a proficiency exam.
    a. TRUE
3. If the term scheme of the plan does not include a summer term, you cannot add it to a student's plan.
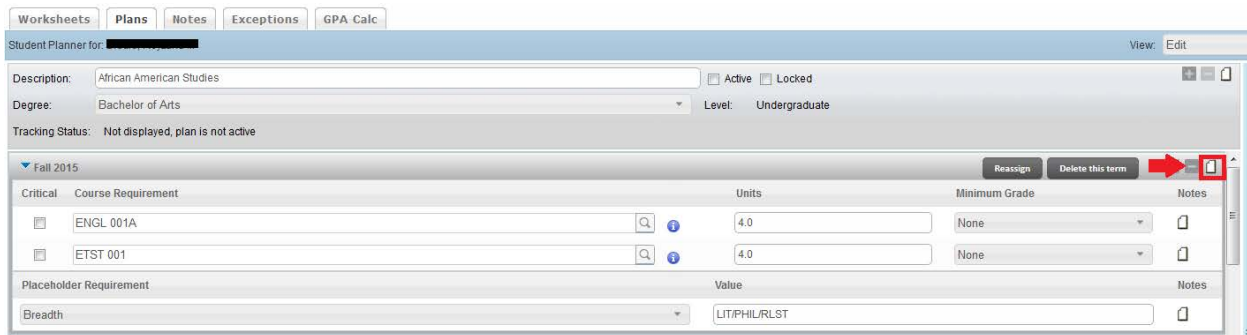   a. FALSE, a term can be added a plan

NOTES

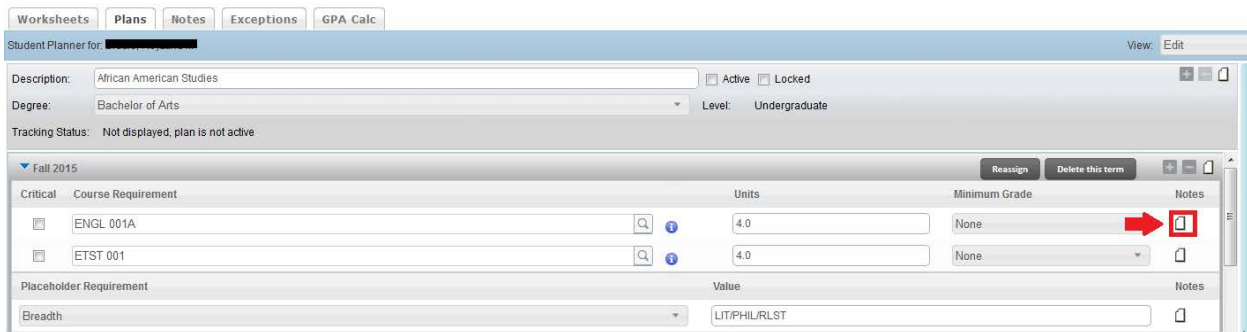Notes can be added to the overall plan, to the term blocks or individual requirements.

STEPS

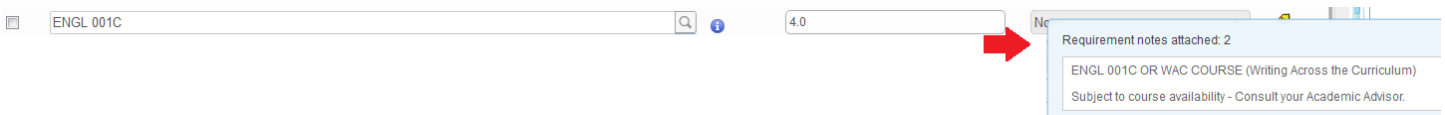1. **Overall plan notes** can be found on the Plan's header.

2. **Term block notes** can be found on the term header.

3. Individual requirement notes can be found on the requirement section.

4. A note with some content is indicated by a ▤ (yellow) icon and an empty note is indicated by a ⬚ (white) icon. Hovering over a note icon gives you the overview of the notes.

5. To **edit** a note, select the yellow note icon ▤. Clicking on the note icon opens the note list window. You will be able to see all notes that have been added by other users, but will only be able to modify your own notes.
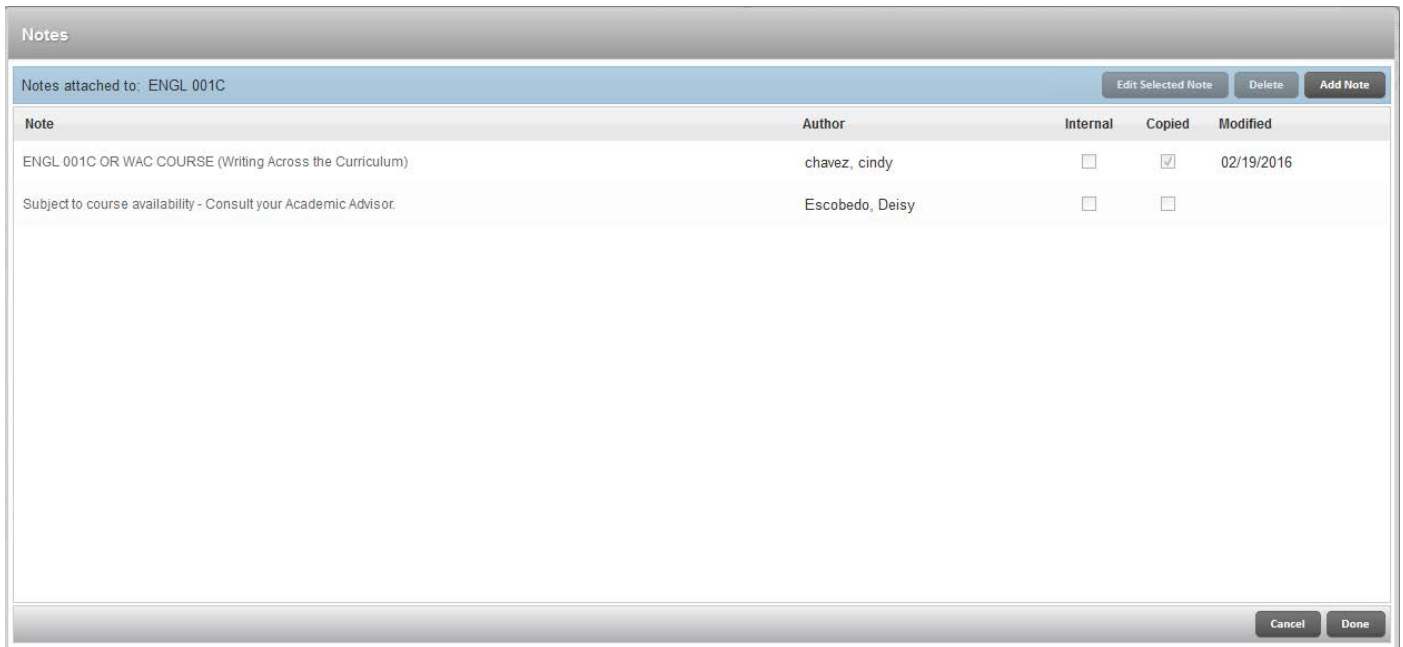
6. Click the note you want to edit, and then click **Edit Selected Note**.

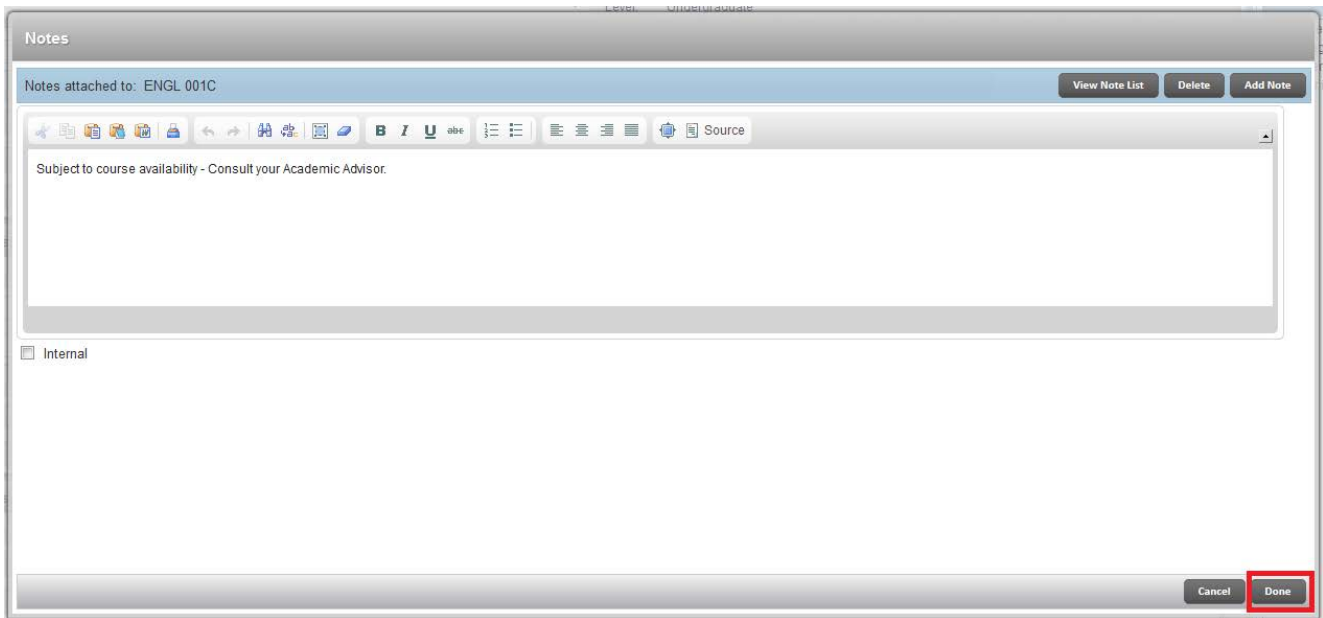7. The text of the note is displayed in a text editor, which supports formatting font, etc.
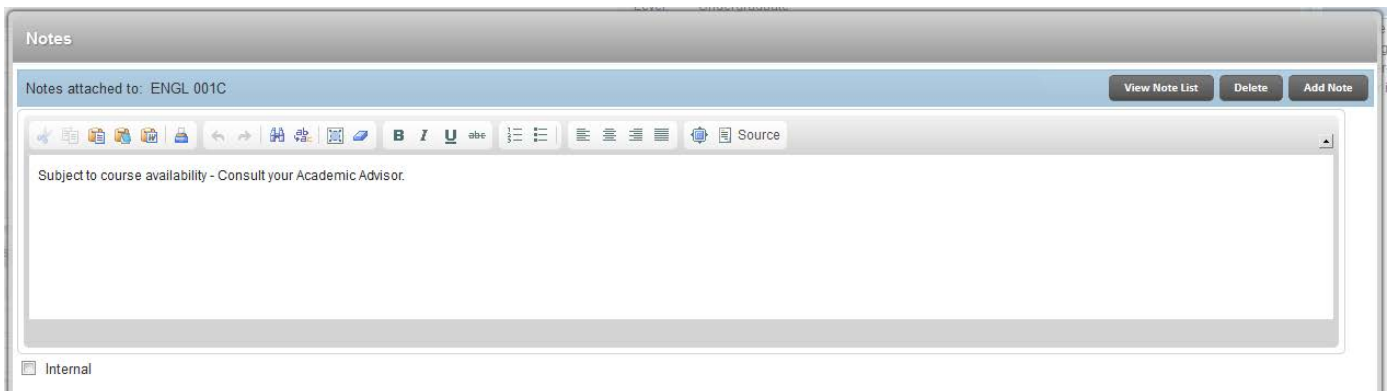
8. Make your edits to the note and click **Done**.

9. To **add** a note, select the note icon where you wish to add a note. Then click on **Add Note**.

10. This opens the note edit window.
    a. Notes can have an unlimited amount of text and can contain text formatting such as indentation, bullet lists, bolds and italics.
11. To make a note internal, select the **Internal** check box. All advisors will have access to view internal notes. Student users will not have access to view internal notes.
12. Once you've entered a note, click **Done.**
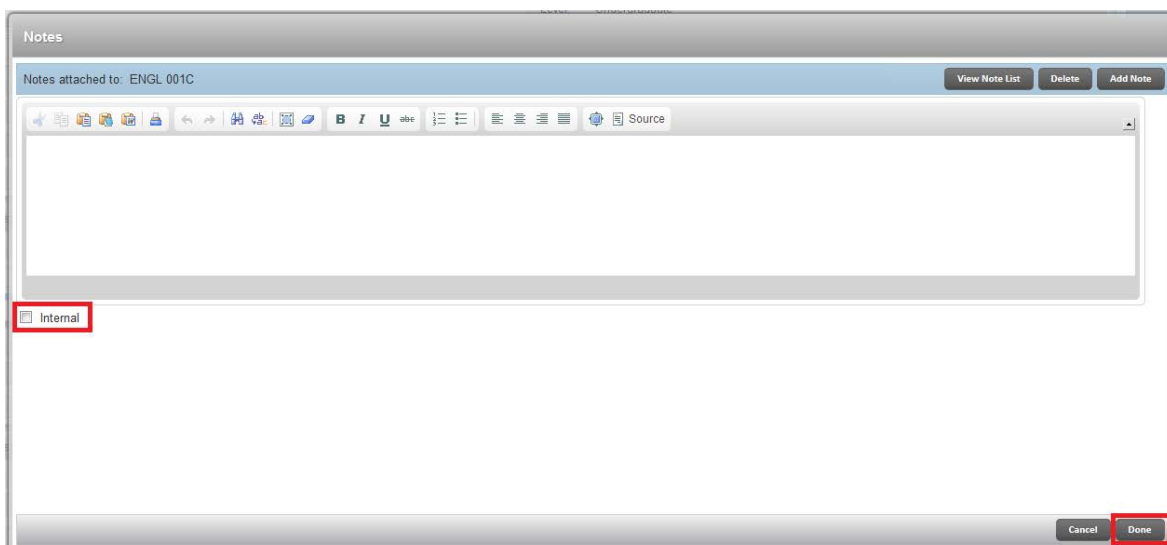
13. To **delete** a note, select the note icon from where you want to delete the note. The notes list is displayed. Click on the note that you want to delete, and then click **Delete**.
    a. Notes should not be deleted unless it is a true error. Maintaining the history is important and this plan is part of the student record.

14. The note is removed. You may only delete your own notes. You may not delete notes entered by other users.

SAVING A PLAN

Changes to a Plan will not automatically save. User must save all changes. Click **Save** after a modification is made to a student's plan. The Save button is located at the bottom right hand corner of the plan's page.

FINAL QUIZ

1. When adding a Choice Requirement where the choice has 2 courses that must both be taken, use the plus button to add the 2nd course.
    a. TRUE
2. When adding a Choice Requirement where the student has a choice of several classes, use the Add Another Option button to list each of the options.
    a. TRUE
3. If you click the reassign button to move a term from fall to winter, the requirements will not display after clicking OK.
    a. FALSE, the requirements will move to the new term chosen.
4. There are 3 levels where notes can be added in the Plans: at the Plan level, at the Term level, and at the Course level.
    a. TRUE
5. The paper icon will be white if there is a note saved on a plan.
    a. FALSE, the paper icon will be yellow if there is a note saved on a plan.