TABLE OF CONTENTS

INTRODUCTION TO STUDENT EDUCATIONAL PLANNER ............................................... 2
  What is the Student Educational Planner (SEP)?........................................................ 2

DEGREE AUDIT AND STUDENT EDUCATIONAL PLANNER ................................. 3

CREATING A NEW PLAN .............................................................................................. 3
  Creating a Blank Plan................................................................................................ 3
  Adding courses to a Term ......................................................................................... 5
  Creating a Plan from a Template ............................................................................ 10

EDITING A PLAN ........................................................................................................... 11
  Add Requirement ........................................................................................................ 11
  Add Placeholder ......................................................................................................... 11
  Move a Course to a Different Term .......................................................................... 11
  Deleting a Course ...................................................................................................... 12
  Editing a Course ........................................................................................................ 12
  Editing a Term ........................................................................................................... 12

CREATING NOTES ...................................................................................................... 13
  Plan Note .................................................................................................................... 13
  Term Note .................................................................................................................. 13
  Course Note ............................................................................................................... 14

AUDIT VIEW MODE .................................................................................................... 15

PRINTING OR SAVING PLAN AS A PDF ................................................................. 16

DELETING A PLAN ..................................................................................................... 17

SEP TRACKING FEATURES ....................................................................................... 17
INTRODUCTION TO STUDENT EDUCATIONAL PLANNER

What is the Student Educational Planner (SEP)?

The Student Educational Planner (SEP), is a feature of Degree Works that helps advisors and students work together to plan each semester of coursework to ensure student success. By developing a plan, students will have a clear path of coursework needed each semester in sequential order. The better students can plan their academic journey, the more likely they are to stay on track and achieve their academic goals. In addition, advisors can use the features in the plan to identify courses that are essential to students’ timely degree completion. Lastly, SEP will eventually give us good data to forecast scheduling needs.

SEP allows you to track all requirements or just the ones you classify as critical, then display their tracking status. If a student is deemed “off track” in one or more trackable requirements, the semester – and possibly the student plan – will be considered “off track” and then appropriate interventions can be taken to help the student succeed.

As you begin to explore and build plans in SEP, this guide will assist you with learning how to use the system to plan future classes, keep track of requirements, and record notes for students regarding their academic progress.
DEGREE AUDIT AND STUDENT EDUCATIONAL PLANNER

The degree audit and plan are best used together!
- The degree audit (Worksheet) shows **WHAT** requirements students have completed and still need for a program.
- The SEP (Plans) offers information for each semester to show students **WHEN** courses should be taken.

CREATING A NEW PLAN

There are two different options for creating a new plan: *Blank Plan* or *Select Template*. **Blank Plans** are useful for students who are already in progress towards their degree completion or who are in programs for which no templates are built. **Templates** are most beneficial for new students who have not yet started their academic career.

Creating a Blank Plan
1. Begin by logging into Banner Web and then into Degree Works.
2. Enter the Student ID number into the Student ID field, or search for the student by name.
3. Click on the **Plans** link on the top menu bar.
   a. If a plan exists, you will see the Plan List for the student. You can then create a new plan by clicking on the **New Plan** button.
   b. If a plan does not exist, you will be prompted to create one.
4. Select **Blank Plan**

5. Select a Starting Term from the drop-down menu by clicking the arrow on the right and click **Submit**.
6. Name the plan by entering text in the Description Box. It is suggested that you type in the name of the degree program and check off the Active and Locked boxes then click Save.

7. Add at least 2 additional terms by clicking the Add Term button and select the next sequential term from the drop-down menu and click Add. You need to build out at least two terms to be able to build the plan using the Still Needed feature.

8. After selecting all of the terms, you can now begin to add courses to the terms in the plan.
Adding courses to a Term
Building courses can be done in several ways.

1. Add a course from **Still Needed** menu. This is the preferred method of adding courses as it will only display requirements that have not been taken or planned for in the CURRENT major. If you are advising for a change of major, you should NOT use this feature.

To access the **Still Needed** menu, you can either the click the right arrow next to < Requirements > or click the + sign under the semester you want to add courses to.

- Click on the arrow next to Requirements, and Still Needed will appear. The outstanding requirements will then be listed by the blocks used on the audit.

Click on the right arrows and you will get a list of courses (or attributes). Once you have a blue course, you can drag the chosen blue course over to the appropriate term.
• Another way to access Still Needed is to click the + button underneath the semester you want to add classes to.

Once you click on the plus sign, all **classes** the university offers will be listed.

• You can go down the list and check the box next to the course you want, you can select the subject from the drop-down arrow next to Subjects begin to type the subject line in the Subject, or you can search by title. Check the box of course(s) you want, scroll down and click **Add to Plan**.

• To access the **Still needed** courses only, click on “Still Needed” at the top of the page. Here you can click and add as many courses as you want. Then click **Add to Plan**.
If you have ranges of courses, scroll to the right and click the down arrow to see the list of courses that fulfill this requirement and select the one the student will take.

**PLEASE NOTE:** If you have a course attribute as a requirement (typically this is the general education competency courses), you will NOT be able to select a course that meets this requirement. Rather you'll need to build your own Choice requirement or select the actual course the student plans to take. Once you do this, the attribute will still continue to show in the “Still Needed” section.

2. Add a course using the `<Requirements>` heading (see below). This is the most time-consuming way and requires you to know the program requirements.

   a. **Class** – use if only one course can fulfill a requirement
      - Click on the blue Class button and drag it over to the appropriate term.
• Once you drag this over to the term, the *New Requirement* box opens (see below)
  o **Select the term** (this will prefill with the term you dragged it to)
  o **Critical** – if it is critical that a student take this course in this semester, check this box. For example, it might be critical for a Psychology student to take PSY 100 – Intro to Psychology in their first semester since it is the prerequisite to all other psychology courses, but it may not be critical that they complete their Gen Ed: Creative Process course in the first semester, even though you add it to the plan.

• **Course requirement** – in this box, begin to type the course subject and the list of courses in that subject should begin to populate – select the appropriate course from the list.
  o **It is important to select the course from the list that populates so all of the other information is captured.**

• **Credits** – if you selected a course from the menu, this will prefill – if not, enter the number of credits for that course.

• **Minimum grade** – if a student needs to earn a minimum grade higher than a D- in that class, click the down arrow and select the appropriate minimum grade. If none is required, leave as is.

**New Requirement**

<table>
<thead>
<tr>
<th>Requirement type</th>
<th>Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term *</td>
<td>FALL 2022</td>
</tr>
<tr>
<td>Critical</td>
<td></td>
</tr>
<tr>
<td>Course requirement</td>
<td></td>
</tr>
<tr>
<td>Credits</td>
<td></td>
</tr>
<tr>
<td>Minimum grade</td>
<td></td>
</tr>
</tbody>
</table>

b. **Choice** – use if more than one course can fulfill this requirement.

**Note:** *Choices will NOT show when you use the Audit view in the Planner. Only Courses will show. You should use the actual course the student plans to take rather than choices whenever possible.*

• Click on the orange *Choice* button and drag it over to the appropriate term.
• Once you drag this over to the term, the *New Requirement* box opens (see below)
  o **Select the term** (this will prefill with the term you dragged it to)
  o **Critical** – same as above, if the student must fulfill this requirement in this specific term, check the box next to Critical
- **Class** – start to type the subject designator (i.e. PSY) and the list will come up and select that course then click add. Then click “add” to add the next course(s) that the student can take to fulfill that requirement.
  - If any course in that subject will fulfill the requirement, type the subject followed by the “@” sign. For example, if any psychology course is required, type PSY @ and when comes up, make sure you click on it from the list.
  - If a specific level of the course is required, type the subject, followed the level then the @ sign. (For example, if the program requires any 300-level course PSY course, type PSY 3@).
  - If you need to enter a course with an attribute, such as a general education competency course type @ @ in the “class” field (with a space between the two @ signs) and when it comes up below that, click on it, and then click the down arrow next to the word attribute and select the appropriate attribute. It is always best to put in the actual course the student plans to take but if they are undecided then you can use the attribute instead.
- **Credits** – again if you select from the list that appears, this will prefill
- **Pointer** – leave this field blank
- **Minimum grade** – if a minimum grade is needed, select appropriate one from drop down menu or leave as is.

To add additional course choices, click the *Add* button and repeat the above steps.
If the choice isn’t clear to students (as may be the case with the general education competencies), it is suggested that you add a note explaining the requirement (for instructions on adding notes, see the “Add Notes” section).

It is highly recommended that whenever possible, you work with the student to select the specific class they want to take to fulfill the choice requirement. In this case you would just add a class requirement instead of a choice. If a choice requirement is already there and the student now decided on which class they will take, it is suggested that you delete the choice requirement and add in the single course requirement.

Creating a Plan from a Template

A template is the Degree Works equivalent of a degree map with all course requirements for a degree program already laid out in a semester-by-semester format. Once applied to a student’s record, it is adjustable. Templates are best to use when a student has no prior coursework completed.

1. Click on “Plans” at the top of the page, click New Plan, then click Select Template.

2. Select the starting term for the student’s plan from the drop-down menu, then click on the appropriate template or you can type the name in the search templates box.
EDITING A PLAN

If you would like to retain a copy of a plan before and after you edit it, you can click Save as copy.

If you want to edit the plan name, or change the active and locked status, once you are in the plan you want to edit, click on the pencil icon next to the plan name, make your changes, and save it.

Add Requirement
To add a class or choice requirement, follow the directions in the “Building a Plan from Scratch” section above.

Add Placeholder
A Placeholder requirement is an informational item you can add to a plan, but it does not fulfill any requirements on a student's audit, nor can tracking be run on placeholders.

To insert a placeholder on an audit, click the + sign next to Placeholder. This will open a box in which you need to select the term you want the placeholder to appear in, select the placeholder you want from the drop-down menu and add a value. You can then add a note for further clarification.

Move a Course to a Different Term
To move a course, choice, or placeholder to a different term:
- Drag and drop the course/choice/placeholders from the current term to the desired term, or
• Click the 3 dots to the right of the course/choice/placeholder and select “Reassign this Requirement” then select the term from the drop-down menu and click “Reassign”

Deleting a Course
To delete a course, choice, or placeholder click on the three dots next to the requirement you want to delete and select Delete this requirement.

Editing a Course
If you want to edit a course, choice, or placeholder on a plan, click on the three dots (ellipsis) next to the requirement you want to edit and select Edit this requirement.

Editing a Term
To DELETE a term, click the three dots (ellipsis) next to the term you want to delete and click Delete this term.
To **REASSIGN** all courses in one term to a new term, click the three dots (ellipsis) next to the term you want to reassign and click Reassign this term then select the term you want to reassign those courses to from the drop-down menu and click Reassign.

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**CREATING NOTES**

Notes can be added on the plan, the term, and/or on the course requirement level. To create a note, click on the paper symbol where you want to add the note.

**Plan Note**
This feature should be used when there is information pertaining to the entire program that you want to convey to the student.

To add a Plan Note, click on the note icon next to the plan name, click *Add a new note*, type the information in the box and click *save note*. You will now notice that the note icon has now turned blue to indicate there is a note.

**Term Note**
This feature should be used when there is information pertaining to that specific term that you want to convey to the student.

To add a Term Note, click on the note icon next to the term you want to add the note to (see below), click *Add a new note*, type the information in the box and click *Save Note*. You will now notice that the note icon has now turned blue to indicate there is a note.
Course Note
This feature should be used when there is information about a course or choice requirement you want to convey to the student.

To add a Term Note, click on the note icon next to the course/choice you want to add the note to (see below), click Add a new note, type the information in the box and click Save Note. You will now notice that the note icon has now turned blue to indicate there is a note.
AUDIT VIEW MODE

When an active plan exists, the default view is the plan view. If you want to see how the planned courses appear on the Audit, click Audit View. This will now display the students Degree Works Audit showing the planned courses and the semester the student plans to take them. This mode will also show you if there are unmet requirements that were not included in the Plan.

Part 3: Major in Psychology

<table>
<thead>
<tr>
<th>Unmet conditions for this set of requirements:</th>
<th>39-45 credits are required. You currently have 16, you still need 23 more credits.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum 2.0 major GPA</td>
<td>Still needed: Your major GPA is 0.00; a GPA of 2.0 is required</td>
</tr>
<tr>
<td>Minimum credits at WCSU</td>
<td>Still needed: A minimum of 20 credits must be taken at WCSU. You have 13 but still need 7 credits.</td>
</tr>
<tr>
<td>Orientation to the Psychology Major (FY)</td>
<td>Orientation to Psych Major PLAN [1] FALL 2022</td>
</tr>
<tr>
<td>PSYCHOLOGY CORE - COMPLETE IN ORDER!</td>
<td>A student who enrolls twice in a course in the research sequence (PSY 204, 324) and does not pass that course shall not continue in the major. A student can appeal to the chair to be reinstated by the department.</td>
</tr>
<tr>
<td>Introduction to Psychology</td>
<td>Introduction to Psychology PSY 100 PLAN [1] FALL 2022</td>
</tr>
<tr>
<td>PSY 201 Psychological Statistics (C- or better)</td>
<td>Psychological Statistics PLAN [1] FALL 2023</td>
</tr>
<tr>
<td>PSY 280 Prof &amp; Career Development Psych</td>
<td>Prof &amp; Career Dev for Psych PLAN [1] SPRING 2024</td>
</tr>
<tr>
<td>Advanced Seminar</td>
<td>Still needed: 1 Class in PSY 412 or 415 or 429 or 420 or 480 or 490</td>
</tr>
</tbody>
</table>

Please Note: Any choices built into your plan, will NOT show on this audit view. You would need to put the actual course the student decides to take on the plan, then it will populate in this audit view.
PRINTING OR SAVING PLAN AS A PDF

To print the plan or save it as a PDF, on the Plans tab, click the printer icon at the top right, you will then see the full plan and you can click the printer icon again on the top right to open the PDF to either save or print.

Please note: 7 terms print across and subsequent terms will print below that.
DELETING A PLAN

To delete a plan, you can do it from the Plan List or from inside the plan.

- To delete a plan from the plan list, click the down arrow next to the plan you want to delete and click the trash can icon, then delete plan.

- To delete a plan from inside the Plan, click Delete Plan and then click on the Delete Plan button.

SEP TRACKING FEATURES

The SEP Plan tracking feature allows users to determine if a student is meeting their goals and milestones each semester. The plan has three levels of tracking status: Plan status, Term status, and Requirement status.

In order for Plan tracking and Semester tracking statuses to show, the Registrar must run the DAP58 Batch Tracking Processor in Transit at the end of each semester. Otherwise it will show as “Not Tracked” – indicated by the brown box with three dashes in it.

Requirement tracking happens automatically once the plan is locked and active. All requirements except placeholders will show a status once the term has begun as either: on-track; off-track; or warning.

On-track designates the student has met the requirement (in the past or in-progress) regardless of the Critical indicator. Off-track designates which Critical
requirements the student has not successfully completed (not taken, failed, withdrawn, not completed, etc.). **Warning** designates non-Critical requirements that are not completed. **Only Critical requirements will make a term or plan off-track.**