DegreeWorks Education Plan (Planner) Instructions

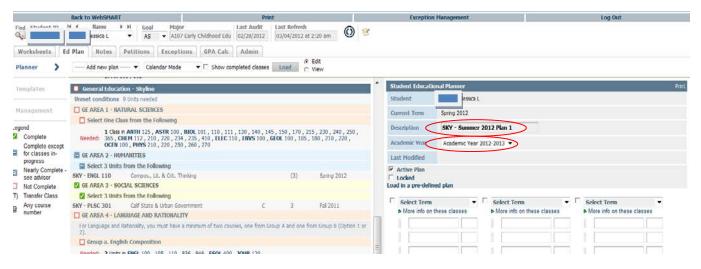
The DegreeWorks Planner allows counselors and advisors to create, view, and save course plans for students.

Creating a Plan

The DegreeWorks Planner has <u>two main parts</u>: the Planner Worksheet and the Student Educational Planner on the right. The Planner Worksheet is a smaller version of the original audit that shows how a student's planned courses apply to the degree requirements. The Student Educational Planner is where the planned courses for each term are entered.

Open the Ed Plan tab to start a new plan. In the Student Educational Planner area to the right, enter a description and select the student's catalog year. While a description is not required to view plans in the Planner Worksheet, it is later used to save the plan. The "Active Plan" checkbox indicates whether the plan is active or not. The "Locked" checkbox prevents a student from modifying the plan, but because students cannot create, modify, or delete plans at SMCCD, the box is currently invalid.

Note: The "Current Term" refers to the last semester of a student's active registration, so it may or may not be the actual *current* term.



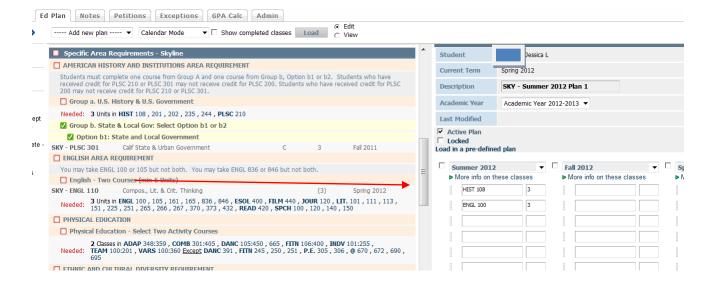
Semester Selection

To begin creating the plan, select a semester term from one of the drop down "Select Term" areas. Only the current or future semesters can be planned for.



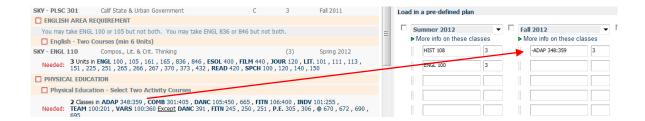
Adding Courses

Add the subject and course number of the planned courses to the fields in the left column and the credit values to the right. Only one course can be applied to each line. Courses can also be added by clicking and dragging the course directly from the Planner Worksheet to the Student Educational Planner. In the example below, HIST 108 was manually typed and ENGL 100 was added by dragging the course from the audit:



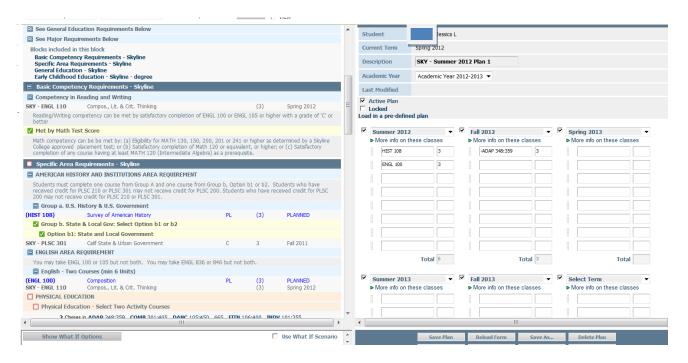
Course Placeholders

Often times, students may select from a list or range of courses to fulfill a requirement. For example, the General Education Requirement for Oral Communications may be completed with one of four courses. We are unable to include a list or range of courses in Planner, but we can add placeholders for requirements of this type. To do so, simply add a dash '-' in front of the requirement. The dash tells DegreeWorks that we are not looking for valid course in Banner.



View the Plan in the Planner Worksheet

After the courses and terms have been added, select the checkbox next to each term and hit the "Process New" button. The planned courses will now appear in parentheses in the Planner Worksheet, indicated by the PL and Planner text. **Note**: The "Check All Terms" and "Uncheck All" buttons may be used to select the terms to display in the Planner Worksheet. The "Check All Terms" button will include blank terms, but it will have no impact on the audit.

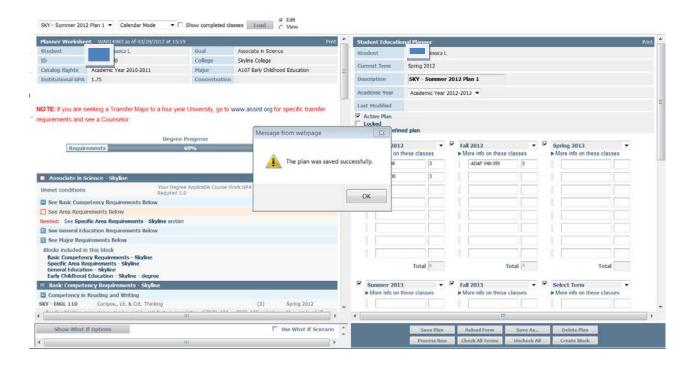


Because the "ADAP 348:359" are only used as placeholders, they are not available to fulfill requirements in the Planner Worksheet. Instead, they pull into the "Not Counted" section near the bottom of the audit, as they are not valid courses in Banner. Once a student has decided which course they would like to complete, the plan can be updated to pull in the specific course.



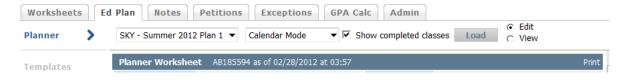
Saving Plans

Select the "Save Plan" button to save the plan. Once the plan is saved, you will be able to select it form the drop down menu near the top of the Planner Worksheet. To save an additional plan, you can either start over by selecting "Add new plan" from the drop down menu and reloading the audit, or click the "Save As..." button to save any changes in a new plan while preserving the older one. "Save As..." will prompt a new window that allows you to save the new plan with a new title. Be aware that changing the description and clicking "Save Plan" will *not* save a new copy of the plan – it will override the current plan. **Note:** The "Reload Form" button will reload the last saved version of your plan.



Show Completed Classes

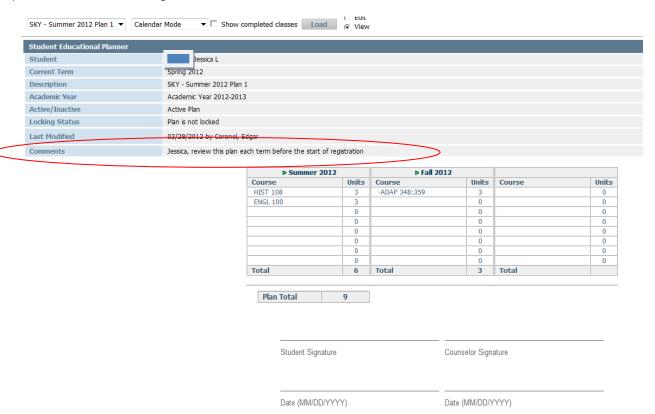
Students may enroll in courses other than what was listed in their plan. To view the courses that the student is currently enrolled in to the Planner, check the "Show completed classes" checkbox and reload the form using the "Load" button.



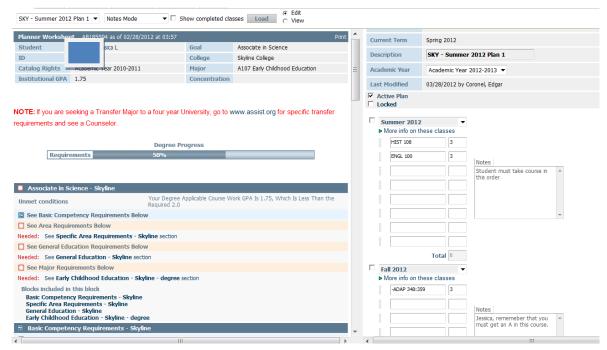
The courses that the student is enrolled in will now pull into the Planner but we are unable to see this feature because there are no old plans in the system.

Planner Modes

The Planner offers three different views types, also known as modes. The Calendar Mode is the view that was used to create the above plan. This mode also provides the plan comments and signature lines for student and counselor



The Notes Mode is used for saving notes that may apply to each semester:

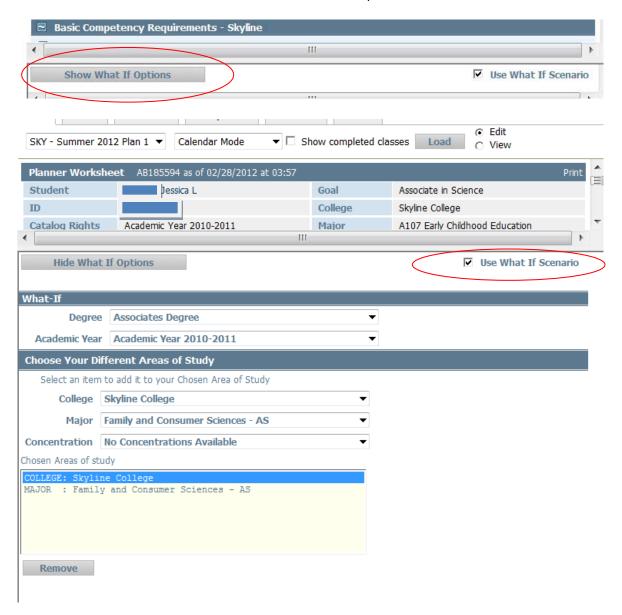


The Planned vs. Taken mode compares planned courses with the courses that have been completed or courses that the student is actively registered in. Although there is a note stating that "only completed terms are evaluated", in-progress courses are included.



What If in Planner

Planner can also be used to plan courses in What If audits. Currently, Jessica is in the AS Early Childhood Education, but let's assume she plans on changing to the AS in Family and Consumer Sciences. On the Planner Worksheet, select the "Show What If Options" button. Complete the What If fields as you would for a regular audit and select the "Use What If Scenario" checkbox. Select the terms on the saved plan, and "Process New".



After the new audit is processed, the "Hide What If Options" button will need to be clicked to view the What If audit with the planned courses. The Planner Worksheet now pulls in the Small Business Administration requirements, along with the planned courses.

