Using Degree Plans: A Toolkit for Faculty Advisors

Degree Plans are an important academic planning tool designed to help students map their path to graduation. They also provide important advising data to support student success and allow for the creation of more accurate schedules based on student demand.

While the Degree Evaluation will remain the official audit of a student's progress towards degree completion, the Degree Plan provides a more effective way to see a student's program requirements over time. It allows each student (with support from an academic advisor) to create their custom path to graduation.

This guide outlines the basic features of Degree Plans as well as the responsibilities of faculty advisors in maintaining Degree Plans. Degree Plans work the same for all students whether they are students who start at Southern, transfer students, or Graduate students. There are sections of this guide that address on-boarding transfer students and Graduate students specifically; however, all advisors should be familiar with the materials in sections 1-3.

For further assistance or to schedule trainings, contact Dr. Meredith Sinclair, Faculty Director of Academic Advising (advisement@southernct.edu).

Table of Contents

Section 1: Degree Plan Basics

Relationship Between the Degree Plan & Degree Evaluation

The Degree Evaluation remains the official audit of a student's progress towards graduation. **Nothing that is changed on a Degree Plan can ever impact anything on a Degree Evaluation.** There is no risk of "messing up" a student's Degree progress by adding, deleting, or moving things on a plan.

The Degree Plan tool "talks" to the Degree Evaluation in that the Degree Plan "Still Needed" list will always update based on a student's progress on the Degree Evaluation. See below for a more detailed explanation of how to use the "Still Needed" list.

Degree Plans do not automatically update based on a student's registration history. This is intentional in that changes to the plan should be made only through discussion between a student and advisor.

It is not necessary to back fill Degree Plans with prior credits earned for students starting a new Degree Plan after earning credits. It is only important that the current and future terms represent a student's plans.
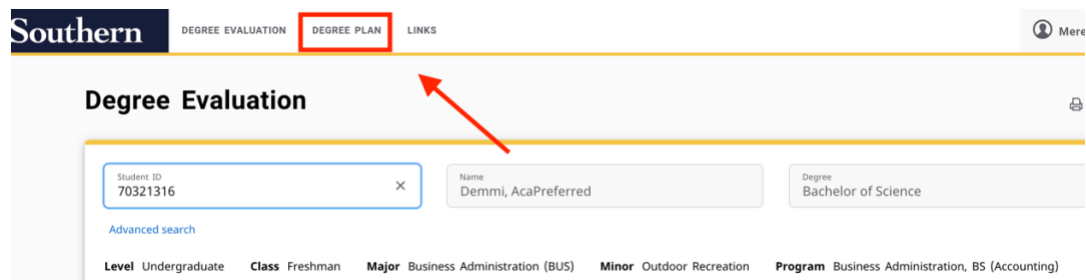
The Degree Plan and the Degree Plan Audit feature should replace use of the Degree Evaluation in advising conversations. See the Advising Meeting Checklist section below for details.

Video: What are Degree Plans?
Watch this video for a brief overview of how Degree Plans work in conjunction with the Degree Evaluation. DEGREE PLAN INTRO VIDEO
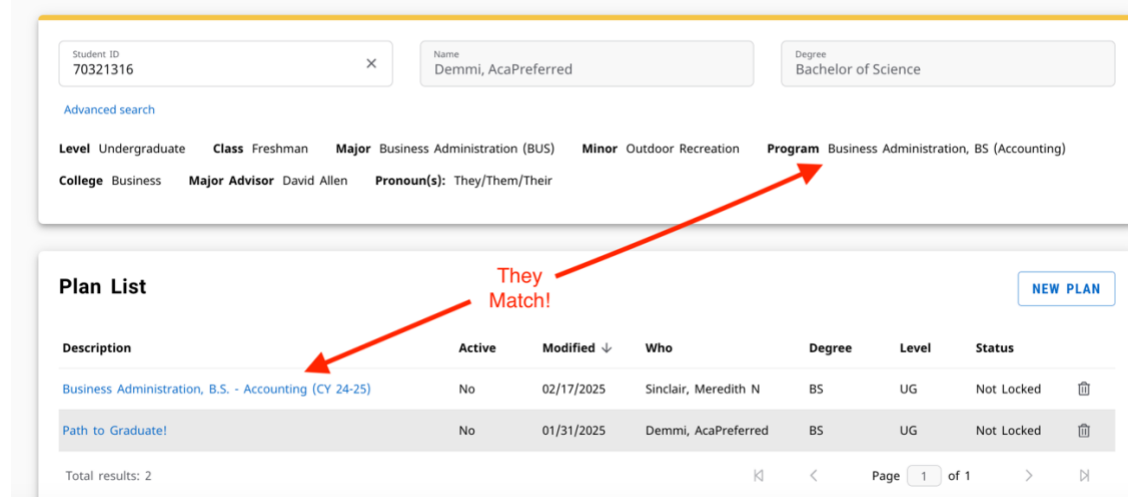
Opening & Locking a Degree Plan

Click the "Degree Plan" tab at the top of the Degree Evaluation to navigate to the Degree Plan List page.

If the student's Degree Plan matches their current major, select it from the list and move on (note, advisors can rename Degree Plans so the title may not match exactly).

Old, inactive plans can be deleted or ignored. Only the locked, active plan will track.

If a Degree Plan is "active" it cannot be deleted; if it is "locked" it generates tracking data and connects to a student's Schedule Planner for registration. Only advisors can make plans active and locked.

You can check the status of the Degree Plan at the top of the plan.

If the plan is not **both active and locked**, click the edit icon. Then make sure both the "active" and "locked" boxes are checked. You can also use this screen to change the plan name if desired (the default name is the template if a template was used).

Note: If you are adding a new plan (either from a template or a blank plan), you must set previous plans to unlocked and inactive before you can make the new plan active and locked. Only one plan can be active and locked at a time.

Video: Opening and Locking Plans
Watch this video for an overview of opening and locking plans: OPENING & LOCKING DEGREE PLANS

1. Locked plans populate **in Schedule Planner** (registration system) so students can generate a choice of schedules easily.

2. Locked plans have **tracking status** enabled; advisors can monitor students' status.

3. Locked plans enable **data reports**; departments can see course demand to help prepare the upcoming annual class schedule.

Subject	Course	Total Scheduled	Total Planned	Over/Under
ANT	100	0	1	-1
ANT	101	200	9	191
ANT	102	209	13	196
ANT	201	90	12	78
ANT	204	25	3	22
ANT	205	69	6	63
ANT	252	23	1	22
ANT	298	30	0	30
ANT	312	22	0	22
ANT	321	25	0	25
ANT	322	23	2	21
ANT	352	23	1	22

Starting a New Plan: Using Templates & Blank Plans

In most cases, you will be working with an existing plan. However, it is helpful to know that plans can be built in two ways:

- By using a Degree Plan template to pre-populate all degree requirements in an 8-semester suggested sequence:
  - Updated templates will be created by departments each catalog year. Templates are not available for catalog years prior to F24; however, you can use the F24 template and adjust as needed OR create a blank plan.
  - Students have a template loaded based on their major at the time of admission. Students who change majors can choose to modify their current plan, load a new template, or use the blank plan option.
- By using the Blank Plan option:
  - Blank plans allow you to drag and drop and/or manually add all required courses to a plan. They work exactly like the templates; they just don't come pre-loaded with courses and placeholders.

If you would like to start a new plan for a student, you may do so either by using an existing template or by using a blank plan.

Click the "New Plan" button above the plan list to get started.

If you would like to use a template, click "select template" and enter the program name in the search box. Use the current term as the start term. Make sure you select the correct major **and catalog term**; all undergraduate and graduate concentrations will be listed. Catalog terms are part of the template name.

If you accidentally select the wrong plan, nothing bad happens! The courses just won't be a match for the student's program of study. If you select the wrong template, simply delete it and reselect the correct one. Any template can be adjusted as needed and renamed if you desire.

Remember that templates will always have all 120 credits represented so you will need to delete any blocks from the template that represent requirements a student has already completed. You can then rearrange the courses and delete terms as needed to give the student an accurate path to graduation.

For students who are further along in a program of study, it may be easier to use the Blank Plan option, especially if you are familiar with the sequence of courses in the program.

Remember, that templates and blank plans work the same way; templates just pre-populate all degree requirements.

Video: Adding Degree Plan Templates
Watch this video for a quick overview of how to select and add a Degree Plan Template: ADDING A NEW DEGREE PLAN TEMPLATE

Video: Modifying Degree Plan Templates to Use with Students Who Have Credits
Watch this video for a tutorial on editing a template for a transfer student or student who is changing majors: MODIFYING DEGREE PLAN TEMPLATES TO USE WITH STUDENTS WHO HAVE CREDITS

Video: Using Blank Plans
Watch this video for a tutorial on adding and using Blank plans: USING BLANK PLANS

Reading & Editing Degree Plans

Templates will pre-populate all 120 credits of a degree into an 8-semester sequence (regardless of what the student has or has not completed). Blank plans will start with no terms or populated courses. **Both plan types work exactly the same way in terms of modifying the plan (adding, deleting, and moving courses or terms, etc.).**

An open plan looks like this:

Once the plan is open, scroll over using the arrows at the top of the plan to see additional terms.

Planned Courses & Placeholders

- **Blue boxes** are planned courses. These may have been on the template already in cases where the major requires a specific course. Or they may have been added during a prior advising session as a choice the student was making about their registration.
- **Yellow boxes** are placeholders. They do not track and do not count in the credit totals that appear on the plan. Yellow placeholders are a reminder of a requirement where a student has a choice to make about how to complete a requirement. On templates, yellow placeholders will match requirement lines on the Degree Evaluation and will provide guidance about the options available to complete a requirement.

Adding & Deleting Terms

You can use the "Add Terms" button at the top right of the plan to add additional terms, including summer or winter.

To delete a term, use the term column menu (three dots at the top of the term column).

Moving, Editing, & Deleting Courses

To **move** a course box (or placeholder box) that is already on the plan you can:
- Drag the course and drop into the desired term.
- OR open the course block menu (three dots at the top right of the course block) and select "reassign this requirement". Choose the term you would like to move the course to.
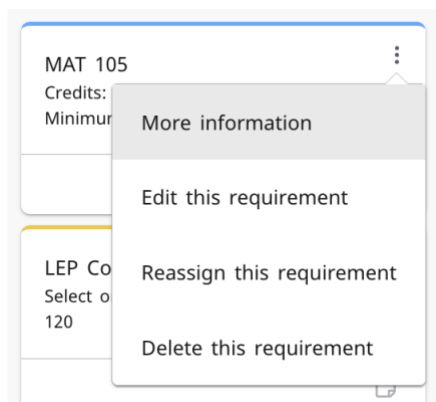
You can also use the course block menu to delete or edit a course or placeholder block.

Note: If you delete a blue planned course and the student has not yet completed or registered for that requirement, the requirement will reappear in the "Still Needed" menu.

Video: Reading & Editing Degree Plans

Watch this video for a quick overview of the basics of reading and editing Degree Plans:
READING & EDITING DEGREE PLANS

Adding Courses: Still Needed & Requirements Menus

The **"Still Needed"** menu on the left-hand side will list degree requirements that that have **not** been planned or completed.
- Requirements will NOT appear on this list if:
  - the student already has credit for a course that meets the requirement (including transfer credit or a waiver)
  - the student is currently registered for a course that meets the requirement (including current and future terms)
  - a course that meets the requirement is a **blue** planned course on the Degree Plan.

- Requirements that are yellow placeholders on the plan WILL appear on the still needed list as the student still needs to plan the course (by adding it as a blue box).
- Remaining free elective and W-course requirements will not appear in the Still Needed list. See the Degree Plan Audit section below for information on using the audit feature to check these requirements.

There are two ways to add courses to the plan:
- Use the "Still Needed" menu:
  - Find the course you wish to add and drag it to the desired term.
- Use the "Requirements" menu:
  - Toggle over to "Requirements" by clicking the arrow beside "Still Needed".
  - To add a course, click the blue "Course" button and enter the required information. "Minimum Grade" and "Delivery" are optional.
  - If a course does have a required minimum grade, you may add that here. Note that adding a minimum grade **does not impact graduation requirements**. It simply reminds the student of the grade they should aim for and pings as off-track if they do not earn the entered grade.

Once you add a course that corresponds to a yellow placeholder reminder box, you can delete the yellow placeholder (click on the three dots in the upper right of the placeholder box and select "delete this requirement").

If you need to add a yellow placeholder to a plan for any reason, you may do so using the "Requirements" menu. Select "Placeholder" and complete the required information.

Because placeholders do not track, you may use this tool to convey any sort of information that you may find helpful. For example, you might add a reminder about applying for an internship or taking a professional exam.

You may also use the "Requirements" menu to add a term GPA requirement. If the student does not have the entered GPA at the end of the term, they will appear as off track. **Using this feature will not impact a student's graduation requirements.**

Video: Adding Courses with the Still Needed & Requirements Menus
Watch this video for a quick tutorial on adding courses to Degree Plans using both the "Still Needed" and "Requirements" menus: USING THE STILL NEEDED & REQUIREMENTS MENUS

Using the Planner Audit

The Planner Audit tool can be used to check that a student's plan contains all outstanding graduation requirements, including free electives and W-courses. It will also show if the student has any planned courses that will end up as excess courses.

Planner Audit is simply a copy of the student's Degree Evaluation that takes all planned courses into account; it is formatted just like the Degree Evaluation.

To run the audit, select "Audit" at the top of the Degree Plan.
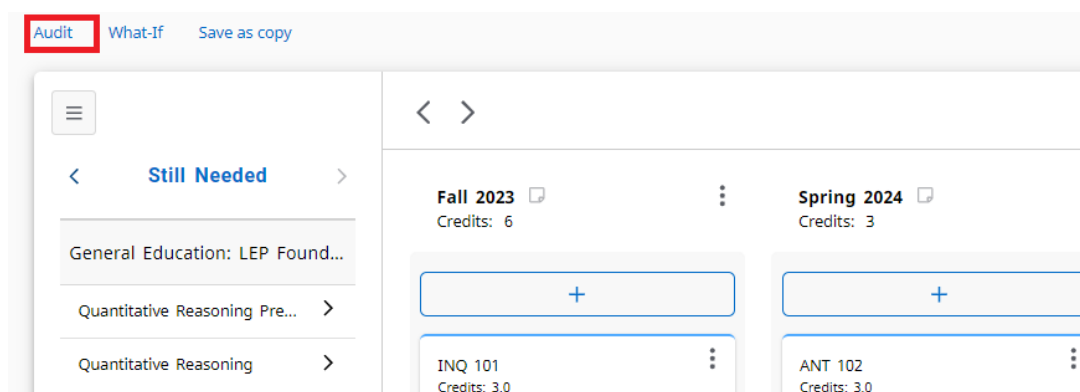
Planner Audit will populate.
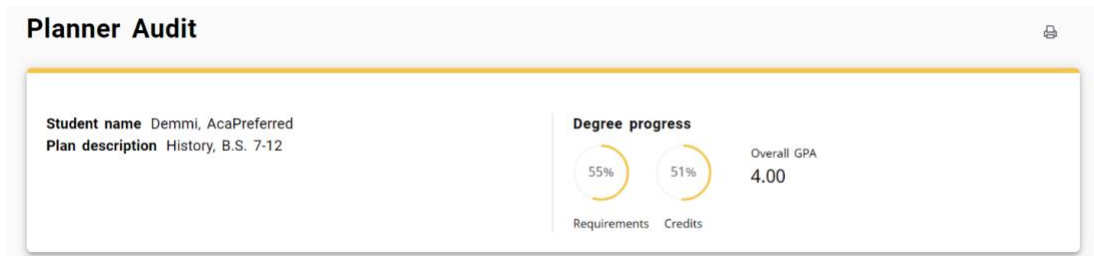
On the audit, blue planned courses display as 'in-progress' and list the term in which they are planned.

Planner Audit lists any planned courses that are considered 'Excess'. If courses fall into excess on the audit, they should be reviewed to determine if they should be removed from the plan.

Review the W-Course requirement section of the audit to determine how many W-courses still need to be taken; add or remove yellow W-Course Reminder placeholders to the plan as needed. Remember that because W-Courses are section level, they will not appear as planned on the audit until the student registers for them even if the student has a course planned that will run as a W-section.

Review the Free Elective requirement to determine how many free elective credits the student still needs to earn. In the example below, the student needs 47 free elective credits in total. They have earned 3 so far and therefore need to earn 44 more free elective credits. Verify correct number of placeholder courses are added to the plan; in this example, I would add 15 placeholders to remind the student of the 44 free elective credits they need to earn (assuming 3 credit classes in most cases).

Bachelor of Arts Degree

Credits Required: 120   Credits Applied to Program (Excludes Excess): 22   Catalog year: Spring 2024

○	Minimum Overall Credits Earned	**Still needed:**	120 credits are required. You currently have 22 credits, including in-progress and pre-registered classes if the boxes above are checked. You still need 98 more credits. You are able to take up to 47 elective credits.
○	Minimum 30 Credits at SCSU	**Still needed:**	You have 22 credits and still need 8
✓	You currently meet the minimum overall 2.0 GPA requirement.		
○	Major Requirements	**Still needed:**	See Major in History section

Writing Intensive Course Requirement   INCOMPLETE   ⌃

'W' courses are not additional course requirements and may be taken within the General Education (LEP), Major, Minor, Cognate, or as a free elective.

○	Writing Requirement	**Still needed:**	You currently have 0, you still need 3 more. 'W' courses are indicated by section number that ends in 'W'. Students must successfully complete ENG 112, ENG 120, HON 150 or Tier 1 Written Communication as a prerequisite to 'W' courses.

Free Electives   ⌃

Credits Applied: 3

Course	Title	Grade	Credits	Term	Repeated
ENG 110	Fund of Academic Writing	IP	(3)	Fall 2024	

Placeholders   ⌃

Description	Value
Free Elective	Select one
Free Elective	Select one
W Course Reminder	Select one

Because yellow placeholders do not indicate specific planned courses, they will not populate in the audit as planned. They will be included in a list at the bottom of the audit.

Video: Using the Planner Audit to Check W-Courses & Free Electives
Watch this video for a quick explanation of how to use the Planner Audit to check remaining W-Courses and Free Electives; includes a brief general overview: CHECKING W-COURSES & FREE ELECTIVE CREDITS USING PLANNER AUDIT

Video: Using the Planner Audit in Depth

Watch this video for an in-depth tutorial on using the Planner Audit to review a student's progress towards their degree. Includes information on understanding "hidden" free-electives and how the Planner Audit shows those. Useful for majors with lots of LEP shares: AN IN DEPTH LOOK AT USING PLANNER AUDIT

Section 2: Undergraduate Advising Meeting Degree Plan Checklist

Degree Plans are a way to facilitate advising meetings; they are a new tool, but just a better way to do what we have always been doing in good advising meetings.

Degree Plans help students understand course sequences, plan their semesters, and create space for experiences like internships, minors, and study abroad. You can use the Degree Plan tool to show students the impact of delaying course requirements, missing key courses, withdrawing from courses and more.

During every registration advising meeting you should:
- Check that the student has a plan for their major that is active and locked.
- Check for any off-track warnings and help your advisee modify their plan to get back on track.
- Update (if needed) the current semester on the plan.
- Update (if needed) the upcoming registration terms.
- Discuss and update (if needed) the upcoming 2 semesters beyond the next registration term.

Students admitted to a professional program or with 60+ credits should have an accurate plan all the way to graduation (all requirements planned; all free electives accounted for).

Video: Advising Meeting Checklist

Watch this video for an overview of the information below including instructions for evaluating and clearing tracking warnings: ADVISING MEETING DEGREE PLAN CHECKLIST

Locking the Plan

Review the section "Opening & Locking a Degree Plan" if needed. **Degree Plans must be locked to track.** There is no reason to unlock a plan unless you are creating a new plan to replace the current one.

Checking For & Reconciling Warnings

The tracking feature in Degree Plans helps students and advisors plan a clear path to graduation.

If the plan is locked and displays a red off-track warning, you will need to determine the cause of the warning and update the plan to get the student back on track. Any course with a warning is an opportunity to talk with the student about how they would like to adjust their plan.

Remember, **only blue planned courses will track**.

Blue planned courses may display a "warning" label for any of the following reasons:
- The student did not register for the course as planned.
- The student withdrew from the course.
- The student did not pass or meet a grade minimum for a course.
- The student has an incomplete for the course.

Business Administration, B.S. - Accounting (CY 24-25) ✎ ▢

PLAN L

Degree Bachelor of Science
Level Undergraduate

Active Yes | **Status** Locked | **Tracking Status** OFF TRACK

Warning Reason #1: The student did not register for the course as planned.

Fall 2024 ▢ ⋮
OFF TRACK   Credits: 15

＋

INQ 101 ⋮
Credits: 3.0

ON TRACK ▢

ACC 200 ⋮
Credits: 3.0
Minimum grade: C

WARNING ▢

Spring 2025 ▢ ⋮
OFF TRACK   Credits: 6

＋

CSC 200 ⋮
Credits: 3.0

ON TRACK ▢

ACC 210 ⋮
Credits: 3.0
Minimum grade: C

WARNING ▢

In this example the student has a warning for both ACC 200 and ACC 210. A quick look at the Degree Evaluation shows that the student has not yet registered for either course.

|			
○	Principles of Financial Accounting ('C' or better)	**Still needed:**	**1** Class in **ACC** 200
○	Managerial Accounting ('C' or better)	**Still needed:**	**1** Class in **ACC** 210
○	Business Information Systems ('C' or	**Still needed:**	**1** Class in **BIS** 370

In the advising meeting, I would use this information to discuss with the student when they should plan to take these courses and simply drag those requirements into the new term. These are required courses so they do need to stay on the plan.

In some cases, a student may have planned a course that they opted not to take or were unable to register for. If the student plans to now take a different course to fulfill the requirement, simply delete the course from the plan.

For example, if a student planned to take HIS 111 to fulfill an LEP requirement but decided to register for a different course, we can simply delete HIS 111 from the plan. This will remove the warning. If you delete a blue planned course that is needed for a requirement, that requirement will now appear in the "still needed" list – so you can't mess up!
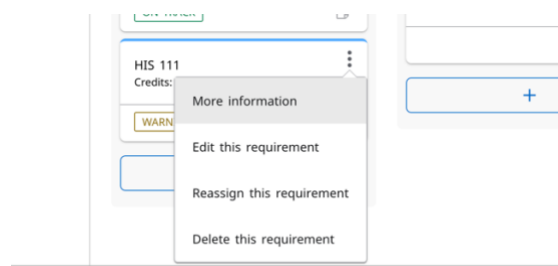
Warning Reason #2: The student withdrew from the course.
If a student withdrew from a course in a past term or in the current term, the course will be marked with a warning until the student re-registers for the course or the course is deleted from the plan.

If the student withdrew from a required course and did not reregister during the current term, make a plan with them as to when to retake the course. If they withdrew from a course that is not required or if they plan to take a different course to meet that requirement, simply delete the course from the plan.

Warning Reason #3: The student did not pass a course or did not meet a grade minimum for a course or has an Incomplete for a course.

This student has a warning for MAT 100P.
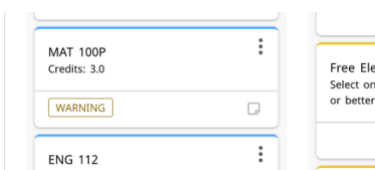
A quick look at the Degree Evaluation shows us the student has not yet earned credit for MAT 100P and is not currently registered for it (the Degree Evaluation would show if a student took and withdrew from a course or if they just haven't registered).

Given that this student needs two additional math courses, I would want to have a conversation with the student about when they plan to take MAT 100P and plan that course with them. I'd also want to make sure they understand how this class impacts their ability to progress through the major.

Note: A warning will resolve as soon as a student registers for a course, even if the planned course is in a PAST term. For example, if a student has MAT 100P planned for Fall 24 and then registers for MAT 100P in Spring 25, the course will no longer show off track.

Another example, this student had MGT 285 planned for Fall 24 and took the course but did not meet the required C or better grade for the course:

The planned MGT 285 will thus have a warning tag until the student re-registers as they have not yet met the requirement for the course. I should discuss with the student the need to retake the course and move it to the appropriate term.

Warning Reason #4: The student has an Incomplete grade.

If the student has a warning because of an incomplete grade in a course, leave the warning course in place. The warning will clear when the student clears the incomplete. Make sure

to check that the student has a plan for clearing the incomplete and remind them that incompletes can have impact on their financial aid and academic standing.

Update the Current Semester on the Plan

In most cases, the current semester should match the student's current registration if you have already resolved any warnings.

If not, use the add, delete, and move course tools as needed to update the current term to match what the student is currently registered for. You can review directions for editing plans in the "Reading & Editing Degree Plans" section above if needed.

If there are any yellow placeholders that the student has already registered for, those may be deleted.

This can be done during the advising meeting and provides an opportunity to ask your advisee how they are doing in each of their courses – something you would be doing anyway!

Update Registration Plans

During spring advising meetings we are discussing summer and fall registration; during fall meetings we are discussing winter and spring registration.

Ideally, students will already have updated their plan prior to their advising meeting to reflect their plans for registering for upcoming terms. If not, you can do this together during the meeting.

Remember that students can import all blue planned courses directly to Schedule Planner. This reduces registration errors and saves students time.

You will move or add courses as needed into upcoming terms. You can also add yellow placeholder courses to reflect additional advice and reminders to the student. Remember, that these **do not track**.   Reasons to use this feature:
- You could create a placeholder to offer options to a student (if you've discussed a few options they might choose in the upcoming term). You can also edit existing placeholders to offer more specific advice.
- You can use the W reminder placeholder if you've advised your advisee to register for a W section.
- You might choose to create a placeholder to remind students about anything else you discuss in the advising meeting such as a program application or other opportunity they should consider.

Important: Make sure to add a blue planned course for those courses that are key for the student to take in the upcoming term. This will allow for tracking on those courses – meaning earlier warnings to you and the student if the student makes registration choices that would impact their time to degree. For example, if I advise my student that they must take CSC 152 or risk falling out of sequence in their program, I would want to make sure that CSC 152 is a blue planned course in the upcoming term.

Note: If you add a blue planned course that will replace a course that is currently a yellow placeholder (for example, adding a blue MAT 112 to replace a yellow MAT 111/112 placeholder), you can delete the placeholder.

Bonus: The audit feature allows you to remove placeholders for requirements that have been met and allows you to calculate remaining free elective and W courses. See the "Using the Planner Audit" section above for more information.

Discussing & Updating Future Terms: A Path to Graduation

How far you go in creating the plan depends on where the student is on their path to graduation:
- A student who is under 60 credits may only be concerned with the next few semesters.
- A student who is still exploring should be planning the next few semesters to explore those specific interests.
- A student who is above 60 credits OR who has been admitted to a professional program OR is an a heavily sequenced major should map a plan all the way to graduation.

Students Admitted to Professional Programs, in Credit Heavy Majors, or with 60+ Credits

If you are working with a student in a professional program or heavily sequenced major OR a student who is above 60 credits, you should use the Planner Audit to make sure the student has the correct number of free elective courses and W-courses planned. Ideally, these students should have all blue planned courses (or free elective placeholders if any free electives remain).

Mapping out all courses to graduation for these students ensures that they won't be surprised by missing courses that aren't offered every semester, missing courses that are part of a sequence, or forgetting about a requirement (including free electives) that might add a semester to their timeline.

Section 3: The Degree Plan Status Report

On the 1st and 15th of the month, you will receive via email a copy of a Degree Plan status report for your advisees. This report will include ALL students for whom you are listed as a primary advisor.

Department chairs can run a Degree Plan status report for all majors and minors at any time via Argos.

The report is delivered as an excel document which you are free to edit as is helpful. It contains the following columns:

- "Type" – indicates whether a student is a new student, new transfer student, readmitted student, or continuing student - the first three categories indicate students new to Southern (or newly returning) for the current semester.
- "Class" – class status based on credit hours
- "ID" – student's Southern ID
- "Last" & "First" – student's name as listed in Banner
- "Program 1" – student's primary program
- "Program 2" – student's second major, minor, or certificate (if applicable)
- "Plan Title" – name of the most recently used plan for the student – in most cases this will be the template name but plan names can be edited. It doesn't matter what the plan is named.
- "Plan Status" – indicates if a plan is active/inactive and locked/unlocked
- "Tracking Status" – indicates if a plan is on track (no warnings) or off track (has warnings) – if you see "not valuated" this likely means the plan is newly locked and hasn't yet tracked
- "Off Track Courses" – if a student is off track, this column will list courses that are flagged – if a course is flagged, the student never registered, has withdrawn, has not passed, or has not met a grade minimum
- "Incomplete Grades" – this column will show any outstanding incompletes the student has as well as the default grade the student will receive if no further work is submitted

Using the Degree Plan Status Report

The purpose of this status report is to help you identify students who may need to have an advising conversation without having to go into individual student records. If all of your advisees have active and locked plans and you are working with students to update their plans during your registration advising meeting, you should have few off track warnings on this report.

To quickly review your report:

- Check that all advisees on this list are correctly assigned to you. If you have a student on your report who is not your advisee, please contact your department chair and ask for the correction to be made.
- Check that all assigned advisees have a locked and active plan. If any are missing, go in and lock and make active the correct plan. If you have a newly assigned advisee, it is possible that they need to have their plan locked and activated.
- Check that the plan title makes sense. If you have a newly assigned advisee who has recently changed majors, they may still have an old plan locked and active. You should deactivate the old plan and make the correct one locked and active.
- For students with off-track warnings, enter their record. Use the advice in the Checking For & Reconciling Warnings section above to evaluate the off-track courses. Contact your advisee as needed to discuss courses that should be urgently retaken.   If you notice that the student has withdrawn from one or more courses, you might also check-in to confirm that they are doing ok in their remaining courses (and to connect them with support resources as needed).
- If a student has an outstanding incomplete, check in with them to make sure they have a plan for completing the course. You might also remind them that lingering incompletes can impact their financial aid status and academic standing in some circumstances.

Beginning of Term Reports: You will likely see an uptick in off track warnings in your first report of the semester (which is sent during drop/add). Things to keep in mind:
- This is an opportunity to reach out to students who are off track in a critical course because they didn't register. Because this report is sent during drop/add, outreach can get them registered and back on track.
- If there are courses with off track warnings because the student registered for a different course for the same requirement (for example, they had HIS 110 on the plan but registered for HIS 111), simply update the plan to reflect their current registration.
- You may also have students who are off track for a course in a prior term – most likely because they did not pass the course or didn't meet a grade minimum. Note: if a student doesn't pass a course, doesn't meet a grade minimum, or withdraws from a course on their plan but then reregisters for that course, the course will NOT show as off track even though it is in the "wrong" term on the plan. You can move the course if you would like but it will continue to track, even in the "wrong" (past) term.
  - If this is a course that is critical for their progress in the major, you should reach out to see if they can change their schedule to get registered for it.
  - If it is not a course that it critical for their progress in the major, you can simply move it to a future term and discuss whether they should retake the class at your next advising meeting.

End of Term Reports: You will likely see an uptick in off track warnings after grade roll as any student who failed a class or did not meet a required grade minimum for a class (if that grade minimum was on the plan) will now be off track. Things to keep in mind:
- If this is a course that is critical for their progress in the major or is a pre-requisite for another course, you should reach out to encourage them to register for the course in the upcoming term.
- If it is not a course that it critical for their progress in the major or a pre-requisite for another planned course, you can simply move it to a future term and discuss whether they should retake the class for a grade replacement at your next advising meeting.

Section 4: Advanced Degree Plan Uses

Once you've familiarized yourself with the above basics, you are ready to use Degree Plans to help students truly customize their academic experience.

Planning Free Electives & Using Reminders

Because Degree Plans allow students to easily see where they have free elective space (and how much free elective space they have) they can make better choices about how to use those credits.

Discussing free elective space early with students allows them to more easily elect a minor, certificate, or even second major. It also allows them to more thoughtfully consider opportunities such as accelerated pathways, internships, an honors thesis, study abroad, and more.

Yellow placeholders can be used as a visual reminder to students to assist in their planning. For example, you may wish to add placeholders to remind students when to apply to their program (if applicable) or when to consider an internship experience.

Second Majors, Minors, or Certificates

If a student elects to add a second major, minor/s, or certificate/s, the requirements for those will appear in the "Still Needed" section of their Degree Plan, just like any unmet requirement for their primary degree program.

Students can easily add these requirements to their plan, making it clear how to sequence all of their requirements.

If you are using a template, only the courses for the student's primary major will be on the template. You'll need to manually add remaining requirements listed in the Still Needed list. If there are shares between a primary program and a second major, minor, or certificate, the Still Needed list will account for that share (just as the Degree Evaluation does). Once the student plans a requirement that shares, both requirements the share meets will come off the Still Needed List.

Students who have a secondary advisor in their second major or minor or certificate should plan to meet with that secondary advisor regularly to ensure that they have correctly planned the courses for that program.

Honors College Students

Honors college student will work with their honors advisor to add their honors college requirements to their plan.   Honors college students should regularly meet with their honors college advisor to make sure that their honors courses are correctly planned.

Any unplanned honors college requirements will appear in the student's Still Needed list.

If you are using a template, LEP placeholders (except for QR and MC) can be removed. Any courses that are major or cognate courses and in the LEP will be labeled as major or cognate and should be left on the plan.

Accelerated Pathways

If a student elects an accelerated pathway, they should update their plan to reflect when they will take their graduate level course. In some cases, the template may indicate suggested timing.

If a student decides not to complete a pathway or reduces the number of courses they plan to take, they can adjust their plan accordingly.

If a student has the accelerated attribute on their record, that requirement will appear in the Still Needed list until planned or met. If a student no longer plans to participate in an accelerated pathway, the attribute can be removed via Audit Memo.

GPA Tracking

It is possible to add GPA tracking to any term on the plan. This is particularly useful for students who are applying to a program with a GPA requirement or when there is a GPA requirement in the major.

GPA tracking on the Degree Plan in no way impacts graduation requirements. It is just another way to visually remind students of their goals and to receive tracking data when students don't meet their goals.

Section 5: On-Boarding Transfer Students

Like first-year students, undergraduate transfer students will automatically have a Degree Plan template loaded based on their degree at the time of admission.

When setting up a new transfer student's Degree Plan, you can either use the pre-loaded template OR a blank plan. You may find one easier than the other depending on your program and the number of credits the student is transferring in.

Please use the information in Section 1: Degree Plan Basics if you need a review of how to read and edit Degree Plans.

Using the Blank Plan Option

If you are on-boarding a new transfer student and have a program with few choices (as in most requirements can only be met by a single course), you may find it easier to use the Blank Plan option. If you go this route:
- First delete the pre-loaded template.
- Then create a new Blank Plan; make it active and locked.
- Use the Still Needed or Requirements menus to add remaining requirements to the plan.
- Use the Planner Audit to verify remaining W-Courses and Free Elective credits required.

Video: Using Blank Plans
Watch this video for a tutorial on adding and using Blank plans: USING BLANK PLANS

Using the Template Option

If the student is bringing in fewer than 60 credits or if they are in a major with many choice options, you may find it easier to simply edit their template to reflect their requirements met. If you go this route:

- Verify that the correct template has been loaded. Sometimes transfer students do switch majors after admission in which case you would need to load the correct template.
- Open the Degree Plan and make it active and locked.
- In a separate tab/screen, open the Degree Evaluation. Use this to determine which requirements the student has already met. For all requirements met (green checks) on the Degree Evaluation, delete the corresponding blue planned course OR yellow placeholder block from the Degree Plan.
- Adjust the student's terms. You will need to move remaining requirements and placeholders to the new correct order. Note that you can reassign an entire term to an earlier term using the column menu. Delete any extra terms.
- Use the Planner Audit to verify remaining W-Courses and Free Elective credits required.

Video: Modifying Degree Plan Templates to Use with Students Who Have Credits

Watch this video for a tutorial on editing a template for a transfer student or student who is changing majors: MODIFYING DEGREE PLAN TEMPLATES TO USE WITH STUDENTS WHO HAVE CREDITS

Section 6: Graduate Student On-Boarding

Graduate student Degree Plans work exactly as described above. Please refer to Section 1: Degree Plan Basics for a review of using Degree Plans.

Graduate students will be provided a guide to help them understand using the Degree Evaluation and their Degree Plan to navigate their program.

Graduate On-Boarding Checklist

Considerations for new graduate students:

- Program coordinators (or a designee) should make new student's plans locked and active. Graduate students will have a template loaded based on their degree and catalog term.
- Templates are built assuming full-time status. If you are on-boarding a student who plans to attend part-time, please adjust their template accordingly.

Maintenance of Graduate Degree Plans

Given that most graduate programs have limited choices in both courses and timing, there's not much updating that needs to happen as a student moves through their program. However, advisors should make sure to do the following:

- Work with students to select appropriate courses when requirements do have options.
- Work with students to select the appropriate capstone experience. All capstone options appear as placeholders on the template to indicate when students should complete the steps of their capstone. You can move or modify these as needed.
- Assist students in resequencing their courses if they must take a reduced course load or leave-of-absence.
- Adjust the plan to reflect a change from full-time to part-time status (or the reverse).
- Monitor degree plan reports and respond to any off-track status warnings. The advisor of record will receive this report bi-monthly; however, department chairs and program coordinators can run a report in Argos for all students in the program at any time.