



Creating a Plan from a Degree Audit

Student Plans

You can create personalized plans that identify the courses students want to take each term to satisfy their declared program and to stay on track to graduation. You and/or the student can plan directly from the degree audit or from a roadmap if they have been set up. Plans can also be built from multiple roadmaps or program audits, allowing you to add minors, concentrated studies, etc. This guide will give you some quick tips on how to plan from a degree audit.

Student View

The screenshot shows the 'Student Academic Planner' interface. At the top, there is a navigation bar with 'Audits', 'Plans', and 'Comments' tabs. Below this, the 'Request an Audit' section is active. It contains a link for 'Run Declared Programs' and a table with the following data:

| School | Degree Program | Title | Catalog Year | Marker | Value | Type | CATLYT |
|--------|----------------|------------------------|--------------|--------|-------|------|--------|
| | AA LA10 | Associate in Arts - AA | Fall 2018 | | | | |

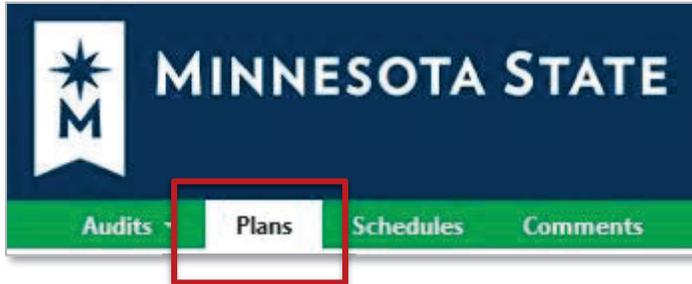
Below the table, there is a 'Select a Different Program' link and an 'Advanced Settings' section with a 'Run Declared Programs' button and a 'Cancel' button.

Staff View in a Student Account

This screenshot is identical to the one above, showing the 'Request an Audit' section in the 'Student Academic Planner'. It displays the same table with one row of data and the same navigation and control elements.

Creating a Plan

Select the Plans tab



On the Manage Plans page, you can create a new plan or edit an existing one.

Manage Sample Student's Plans ?

Program: *Psychology: Option A, BA*
Catalog: *Fall 2017*

[My Plans](#) [Create a New Plan](#)

| Preferred | Edit Plan | Action | Updated | User | PDF |
|-----------|---|-------------|-------------|------------|---------------------|
| ★ | Bus Adm Candidate | Select... ▼ | Jun 3, 2020 | 0012407780 | PDF |
| ☆ | Cassandra Bio Chem 2 - 4/8/20 | Select... ▼ | Apr 8, 2020 | 0001226684 | PDF |

Create a New Plan

Create a New Plan for your Program/Declared Major

- Enter Plan Information: Plan Name, Term, Year, and Years to Graduation
- Select Add Plan

The screenshot shows a web interface for managing student plans. At the top, there is a header 'Manage Sample Student's Plans' with a help icon (a question mark in a circle) to its right. Below the header, the current program is listed as 'Associate in Arts, AA' and the catalog as 'Fall 2018'. There are two tabs: 'My Plans' and 'Create a New Plan', with the latter being highlighted by a red box. Below the tabs, the section 'Enter Plan Information Here:' contains a form with the following fields: 'Plan Name' (text input with 'Sample Plan by SSS 9/2020'), 'Term' (dropdown menu with 'Spring (5)'), 'Year' (text input with '2021'), and 'Years To Graduation' (text input with '2'). An 'Add Plan' button is located at the bottom right of the form. A red callout box titled 'Plan Tips' is overlaid on the right side of the form, containing instructions for creating and modifying plans.

Plan Tips

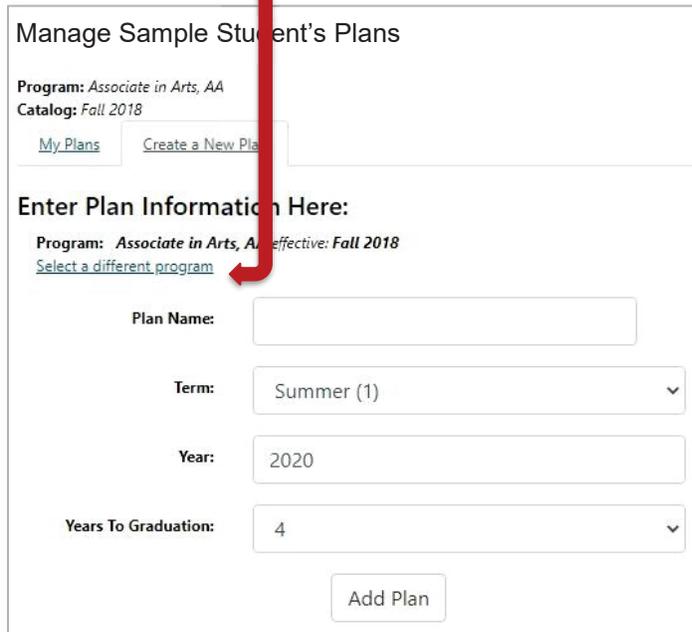
To Create a Plan:

1. Click the "Create a New Plan" tab.
2. Select a program.
 - a. To create a Plan with your declared major, skip to step 3.
 - b. To create a Plan with another program, click on the button with your declared major listed then select a new program with which to build your plan then proceed to step 3.
3. Give your plan a name and year in which to start
4. Click the "Add Plan" button.

To Modify a Plan:
Select your plan from the table by clicking on the plan name.

Create a New Plan for a What-If Program/Major

Select a different program



Manage Sample Student's Plans

Program: Associate in Arts, AA
Catalog: Fall 2018

[My Plans](#) [Create a New Plan](#)

Enter Plan Information Here:

Program: Associate in Arts, AA effective: Fall 2018
[Select a different program](#)

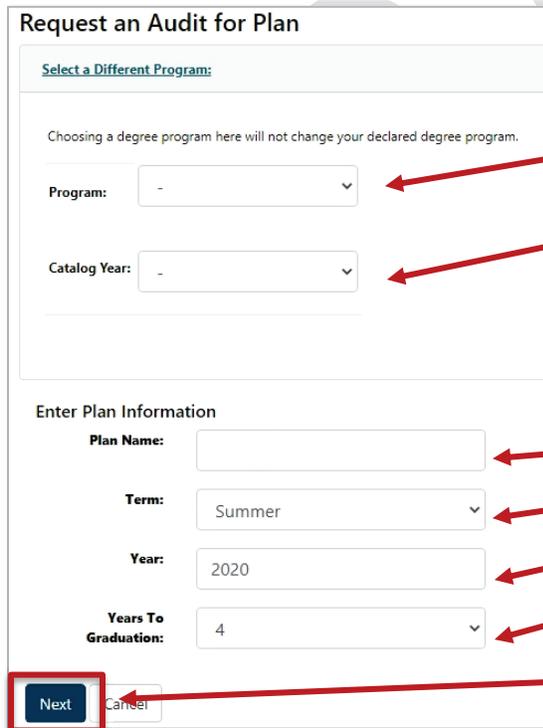
Plan Name:

Term: Summer (1) ▼

Year: 2020

Years To Graduation: 4 ▼

It will open to "Request an Audit for Plan"



Request an Audit for Plan

[Select a Different Program:](#)

Choosing a degree program here will not change your declared degree program.

Program: - ▼

Catalog Year: - ▼

Enter Plan Information

Plan Name:

Term: Summer ▼

Year: 2020

Years To Graduation: 4 ▼

- Select Program
- Select Catalog Year

- Enter Plan Information:
 - Plan Name
 - Term
 - Year
 - Years to Graduation
- Select Next

Plan Builder

The screenshot shows the Plan Builder interface with three steps outlined in a red box:

- Step 1:** Click or tap a course to view more details about that course.
- Step 2:** Drag course into appropriate Term on your Plan.
- Step 3:** Use the "check" Plan button to check your Plan against the audit to ensure requirements are fulfilled as needed.

On the left, the **Audit Side** shows the program BA PSYA and a list of goals, including GOAL 10: PEOPLE AND THE ENVIRONMENT (3 SH) and GOAL 11: PHYSICAL DEVELOPMENT AND WELLNESS (2 SH). A red box highlights the "Audit: BA PSYA" label.

On the right, the **Plan Side** shows a plan named "My Plan" with 0 Credits. A red box highlights the "Plan: My Plan" label.

Add courses from the Audit Side to the Plan Side

- Open Course Catalog Details from degree audit, Select Term, and Add Course

This screenshot shows the "Course Catalog Details" for PSY 350. A red box highlights the "Select Term" dropdown menu, which is set to "Spring 2021", and the "Add Course" button. A red arrow points from the course listing in the audit side to this dialog box.

The "Course Availability" table is also visible:

| | Fall 2020 | Spring 2021 | Summer 2021 | Fall 2021 | Spring 2022 | Summer 2022 | Fall 2022 | Spring 2023 | Summer 2023 | Fall 2023 | Spring 2024 |
|--------------|-----------|-------------|-------------|-----------|-------------|-------------|-----------|-------------|-------------|-----------|-------------|
| Availability | ? | ? | ? | ? | ? | ? | ? | ? | ? | ? | ? |

- Grab the course from the degree audit and drag it to the term

This screenshot shows the course PSY 350 being dragged from the audit side to the "Spring 2021" term in the plan. A red box highlights the course in the audit side and the "Spring 2021" term in the plan. A red arrow indicates the drag action.

Add courses on the Plan Side

- Add courses to your plan individually using the Add Course button under any term

The screenshot shows the 'Add Course' dialog box with fields for Department Abbreviation and Course Number. In the background, the 'Plan: My Plan' interface is visible, showing a list of terms: Spring 2021 (3 Credits), Summer 2021 (0 Credits), and Fall 2021 (0 Credits). The 'Add Course' button is highlighted with a red box in the Spring 2021 term header.

Deleting a Course

- Select the Edit button on the term line.

The screenshot shows the 'Plan: My Plan' interface with a total of 9 Credits. The Spring 2021 term is expanded, showing a list of courses: BIOL206 (3 Credits), PSY 350 (3 Credits), and PSY 498 (3 Credits). The 'Edit Term' button is highlighted with a red box, and a red arrow points to it from the 'Select the Edit button on the term line' instruction.

Plan: My Plan 9 Credits

Graduation Goal GPA: 0.000
Projected Cumulative GPA: 3.200 ⚠

[Expand All](#) / [Collapse All](#)

▼ Spring 2021 9 Credits

Planned GPA: 0.000

| | | | | |
|---------------------------------------|---|---------|----|-------------------------------------|
| BIOL206 <i>Normal Nutrition</i> | 3 | Credits | PL | <input type="checkbox"/> |
| PSY 350 <i>No description</i> | 3 | Credits | PL | <input checked="" type="checkbox"/> |
| PSY 498 <i>Integrative Seminar</i> | 3 | Credits | PL | <input type="checkbox"/> |

Delete All

Submit

- Check the box to the right of the course to be deleted or All to check/delete all courses in the term.
- Select Delete. You will be prompted to confirm deletion.
- Select Submit to save your changes.

Validate Against the Degree Audit

When a plan is validated, the audit is rerun to reflect how planned courses apply throughout your program of study. It's a good idea to validate often to double-check where courses are applying to make sure you are satisfying requirements and where they might be completing more than one requirement.

Validate planned courses against the audit by selecting the checkmark icon at the top of the plan

Plan: My Plan 6 Credits

Graduation Goal 3.200

Check plan against degree audit to make sure requirements are being fulfilled.

Planned courses will display as PL in purple on the Audit Side

Plan Builder [Show Help](#)

Audit: AA TPHI

Program: History Transfer Pathway, AA
Effective: Spring 2021
[Expand All](#) / [Collapse All](#)

PLANNED: 14.00 CREDITS

History Core Courses
A total of four HIST courses are required, at least one of which must be HIST 1100 or HIST 1110.

PL 1) Take either HIST 1100 or HIST 1110.

PLANNED: 0 COURSES TAKEN 1 COURSE TAKEN

F 21 HIST1110 3.0 PL American History from 1865: E

PL 2) Take 3 additional HIST courses.

PLANNED: 1 COURSE TAKEN 2 COURSES TAKEN

F 18 HIST1000 4.0 A World Hist to 1500
S21 HIST1010 4.0 PL World History Since 1500
S21 HIST1210 3.0 PL European History Since 1500:

Plan: My Plan **14 Credits**

[PDF](#) [Print](#) [Share](#) [Checklist](#) [Check](#) [Minus](#) [Plus](#)

Graduation Goal GPA: 0.000
Projected Cumulative GPA: 3.287

[Expand All](#) / [Collapse All](#)

- > Spring 2021 **11 Credits** [View](#) [Delete](#)
- > Fall 2021 **3 Credits** [View](#) [Delete](#)
- > Spring 2022 **0 Credits** [Delete](#)
- > Summer 2022 **0 Credits** [Delete](#)
- > Fall 2022 **0 Credits** [Delete](#)

Planned courses will display as PL in purple on the degree audit

Completed Audit Requests

These are the audits that have been run in the past for this student's record. Hitting the 'Run Audit' button will run a new audit report. Deleting audits removes them from this list.

[Run Audit](#) [Delete](#)
Select All/None

| ID | Instcd | Program | Catalog Year | Created | Audit Type | Format | Title | Run By | Course Type | View | Delete |
|----------|--------|-------------------------|--------------|--------------------|------------|--------|-----------------------|--------------------|-------------|----------------------------|--------------------------|
| 38804505 | | AA LA10 | Summer 2020 | 09/21/2020 9:10 PM | | HTML | Associate in Arts, AA | planner-0001016049 | | View Audit | <input type="checkbox"/> |
| 38804462 | | AA LA10 | Summer 2020 | 09/21/2020 8:32 PM | | HTML | Associate in Arts, AA | planner-0001016049 | | View Audit | <input type="checkbox"/> |
| 38804455 | | AA LA10 | Summer 2020 | 09/21/2020 8:31 PM | | HTML | Associate in Arts, AA | planner-0001016049 | | View Audit | <input type="checkbox"/> |

Legend

In Progress Course

Planned Course

[Audit Results](#) [Course History](#) [Enter Exception Mode](#)

Audit
You are here: Audit

Categories Click on any area of the graph for further detail.

Credits

GPA

MNTC Courses:

Health/PhysEd:

GPA 2.000

■ Complete
 ■ In Progress
 ■ Unfulfilled
 ■ **Planned**

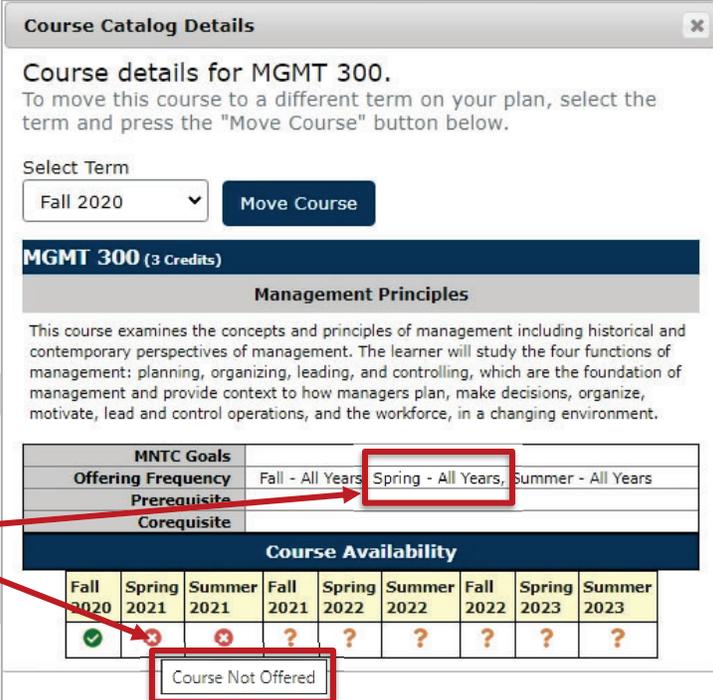
Notations on the Plan

If a course displays with a red circle with a minus  it is an alert there may be an issue with planning this course. Hovering your cursor over the red circle will give you a hint: in this case, the course is not offered during this term.



The screenshot shows a course plan for Spring 2021 with 3 Credits. A status alert box is open, indicating that the course is not offered in this term. The course listed is MGMT300 (3 Credits), Management Principles, with a Planned GPA of 0.000. A red circle with a minus sign is next to the course name.

If I click on the course, I see that this course displays as not available Spring 2021. Course information displaying in the Course Availability grid reflects which courses are on the published course schedule in eServices for the term listed. Some schools may not have the schedule published for that term yet.



The screenshot shows the Course Catalog Details for MGMT 300 (3 Credits), Management Principles. It includes a description of the course, a table for MNTC Goals, a table for Offering Frequency, and a Course Availability grid. A red box highlights the 'Spring - All Years' option in the Offering Frequency table, and another red box highlights the 'Course Not Offered' status in the Availability grid for Spring 2021.

| MNTC Goals | |
|--------------------|--|
| Offering Frequency | Fall - All Years, Spring - All Years, Summer - All Years |
| Prerequisite | |
| Corequisite | |

| Course Availability | | | | | | | | |
|---------------------|-------------|-------------|-----------|-------------|-------------|-----------|-------------|-------------|
| Fall 2020 | Spring 2021 | Summer 2021 | Fall 2021 | Spring 2022 | Summer 2022 | Fall 2022 | Spring 2023 | Summer 2023 |
| ✓ | ✗ | ✗ | ? | ? | ? | ? | ? | ? |

In that case, using the Offering Frequency information (if available) can help you know which terms the course is usually offered.

In this example, Offering Frequency tells us that the course is usually offered Fall – All Years, Spring – All Years, and Summer – All Years. I know my school doesn't have the Spring 2021 schedule published yet, so I will leave the course on my plan and when that term schedule is published, availability will be updated and reflected on the Plan and in the Course Availability grid.

Legend for Icons Used on Plans



Note: See eServices for course Pre and Co Requisite information

This icon is not used in our configuration = Course with Pre or Co Requisites

Planner Icon Descriptions



- View an Audit: Toggles between plan and freshly run audit showing all planned courses
- View PDF: Displays in-progress plan as PDF
- See Associated Roadmap: Lists any associated roadmaps (no associated roadmaps when icon is gray)
- See Completed Courses: Displays plan on left and completed coursework on right (to return, select See Completed Courses again)
- GPA Calculator: Displays plan on left and ability to plan GPA on right (to return, select GPA Calculator again)
- Comments: Displays plan on left and allows you to read/make comments on right (to return, select Comments again)
- Check Plan against Degree Audit: Validates plan against audit and checks term availability



Remove All Courses: Removes all planned courses



Add Term to Plan: Adds a new term to a plan



Not Approved: Displays on Preferred plans and terms before a plan is approved



Approved: Displays on Preferred plans once a plan or a term has been approved

Approved Term

Program: No Declared Program
Catalog: Fall 2020

[My Plans](#) [Create a New Plan](#)

| Preferred | Edit Plan | Action | Updated | User | PDF |
|-----------|---|-------------|--------------|------------|-----|
| ☆ | 2 year Business Plan 28 | Select... ▼ | Sep 29, 2020 | 0001016049 | |
| ☆ | 4 year Business Plan 1 | Select... ▼ | Sep 29, 2020 | 0003743982 | |
| ★ | Biology Plan | Select... ▼ | Sep 29, 2020 | 0001016049 | |

Staff View

Plan: Biology Plan 4 Credits

Graduation Goal GPA: 0.000
 Projected Cumulative GPA: 3.481

[Expand All](#) / [Collapse All](#)

Fall 2020 **APPROVED** 4 Credits

Student View

Plan: Biology Plan 4 Credits

Graduation Goal GPA: 0.000
 Projected Cumulative GPA: 3.481

[Expand All](#) / [Collapse All](#)

Fall 2020 **APPROVED** 4 Credits

Approved Plan

| Program: No Declared Program Catalog: Fall 2020 | | | | | |
|--|-------------------------|-------------|--------------|------------|-----|
| My Plans Create a New Plan | | | | | |
| Preferred | Edit Plan | Action | Updated | User | PDF |
| | AA Plan | Select... ▾ | Sep 29, 2020 | 0001016049 | |

Staff View

Plan: AA Plan
18 Credits

Plan Approved
 Approved by: 0001016049
 Approved with: Audit: Liberal Arts & Sciences, AA
 On: 09/29/2020 03:54

Graduation Goal GPA:

Projected Cumulative GPA:

Student View

Plan: AA Plan
18 Credits

Plan Approved
 Approved by: 0001016049
 Approved with: Audit: Liberal Arts & Sciences, AA
 On: 09/29/2020 03:54

Graduation Goal GPA:

Projected Cumulative GPA: