Understanding and Utilizing the DegreeWorks Planner

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Last updated 7.17.18 by Drew and Paige

What is the DegreeWorks Planner?

The DegreeWorks Planner is a tool within DegreeWorks that students and advisors can use to develop the student's individualized degree plan.

The DegreeWorks Planner also serves as the home of the advised course schedule. Advisors have previously used the DegreeWorks "notes" function to record the advised course schedule. While the "notes" feature is still active and will continue to be used during orientation sessions, the DegreeWorks Planner is a tool that can not only record the advised course schedule, but it can also further student collaboration in degree planning and assist with course forecasting.

How do I use the DegreeWorks Planner?

Review the DegreeWorks Audit Worksheet

- Initially, access DegreeWorks via Self Service Carolina.
- Look up a student's record either by inputting the student's Banner (USC) ID in the "Student ID" field, or searching for the student by name.
- Select "Process New" at the top of the audit. This will pull the latest information from the Banner Student Information System into the student's audit, including any updates to their currently enrolled course schedule.

Access the DegreeWorks Planner

The first step in developing or revising a student's degree plan in the DegreeWorks Planner is to review their current progress toward degree using the degree audit worksheet.

- By first reviewing the progress and curriculum noted on the degree audit worksheet, an advisor and student then have an accurate understanding of what has been completed, what is in progress, and what needs to be completed.
- After you have developed an understanding of the individual student's progress toward degree using the degree audit worksheet, click on the "Plans" tab to start building the student's degree plan.

Select a Template

If this is the first time you are creating a plan, you will be prompted to choose whether you would like to develop a blank plan or a template.

- A "blank plan" is simply the shell of a plan that is not already attributed to a specific major.
- A "template" will allow you to select a major and catalog year already built by the Registrar's Office.

You should choose "Select Template" as your option. Select an appropriate template from the list that is organized by catalog year and major.

- Use the "Search by Template Description" to locate templates by catalog year or major name. Enter the search terms in the field and select "go."

- When you have found your desired template, double click it to open.
- Select the term to begin the plan, and then select “okay”. The DegreeWorks Planner will then populate the template in the “edit” view. From this view, you will see 12 semesters built out from the term you selected to start the plan. A 12-semester plan builds in the traditional 8 semesters along with 4 semesters for summer study, as needed.
- Before moving forward, select “Save” in the bottom right so that the template is saved to the student’s record.

How Do I Build the Plan?

<u>Manual Construction</u>
The Degree Works Planner affords the opportunity to **manually** build components or **drag and drop** components directly from the audit. *Let’s first review the manual techniques for building a plan.*

The default view in the top right is set to “edit” as you begin developing the plan. The “edit” view is used to input classes into the student’s plan. To begin developing the plan in the “edit” view:
Select the “plus” icon in the term in which you wish to begin. You will then be prompted to select the requirement you wish to add.

An advisor has 6 options available in any given term to record course plans or requirements.

The first three options record course advisement.

1. **<u>COURSE</u>** – **Select “course” when you wish to input a single course the student should take.** This is the most straight-forward option and perhaps the most common option you will select.
    - Select the plus icon in the term and then select “course.”
    - In the “course requirement” field, select the magnifying glass.
    - In the course field, type the subject code to automatically populate course options (examples include ENGL; BIOL; MGMT; etc.)
    - Select the course from the list. The course will then be placed into plan. Credit hours will automatically populate, but you may also input a minimum grade or delivery method.

2. **<u>PLACEHOLDER</u> – Select “placeholder” when you wish to input a category the student must complete.** Examples could include Carolina Core outcomes, major electives, a range of course numbers in a particular subject, and more. The “placeholder” option can also be used in a similar way as the “non-course” option. For further explanation on what the varying placeholder options mean, refer to the program of study’s Major Map.
    - Select the plus icon in the term and then select “placeholder.”
    - Click the drop down menu to select your placeholder requirement.
    - You can further explain course selection in this category by placing notes in the “value” field.

3. **<u>CHOICE</u>** – **Select “choice” when you wish to give a student multiple course options for a particular requirement.** The choice option can be particularly valuable when you wish to provide alternates with specific courses.
    - Select the plus icon in the term and then select “choice.”

- In the “course requirement” field, select the magnifying glass.
- In the course field, type the subject code to automatically populate course options.
- Select the course from the list. The course will then be placed into the plan.
- Select “add another option” to continue providing the student with options.
- When finished making selections, click “done” to place the options in the plan. They will populate in the “choice requirement” box.
- Further explain advisement by inputting a minimum number of credits, minimum grade, or delivery method.

The next three options record degree requirements.

4. **<u>GPA</u> – Select “GPA” when you wish to document a required minimum GPA for the term or for progression.**
    - Select the plus icon in the term and then select “GPA.”
    - Click the drop down menu to select the GPA note. Then, input the minimum GPA.

5. **<u>NON-COURSE</u> – Select “non-course” when you wish to document a requirement that is part of the degree but not attributed to a specific course.** *This element will be fully functional in future updates to the Degree Works Planner. Remember that you can provide additional non-course detail requirements by adding a note at the term level.*

6. **<u>TEST SCORE</u> – Select “test score” when you wish to document a test score requirement.** *This element will be fully functional in future updates to the Degree Works Planner. Remember that you can provide additional test score requirements by adding a note at the term level.*

<u>The Planner Sidebar</u>
The Planner Sidebar affords drop-and-drag capabilities for building the plan.

Navigate to the “edit” view. In the far right of your screen, you will notice a small left arrow. Click the left arrow. This will open the “Planner Sidebar.” This sidebar will allow you to either directly select courses that display as “still needed” on a student’s degree audit or make manual selections from a broad course listing that is not specific to the student.

Select “Still Needed” to view the categories that compose the degree audit worksheet. When you double click a category, the courses that display as “still needed” in that respective portion of the audit are presented. You are then able to select a course and drag it into the advised term. Once dropped into the term, the selection will populate in the term as a course requirement. Remember to select “save.”

Please note: you can drop-and-drag specific courses, but you cannot drop-and-drag categories. Manual entry via the “Placeholder” option is best to log advisement for a broad category.

<u>Notes</u>
The DegreeWorks Planner, similar to the degree audit worksheet, also offers a notes feature. Notes can be attributed to individual requirements, entire terms, or entire plans. ***A best practice for advisors will be to create a note on every “term level” stating who completed the advisement for that term.***

To add a note:

- Navigate to the level where you wish to place the notes. Remember that notes can be added to individual requirements, to entire terms, or to an entire plan.
- Select the “notes” icon in the far right.
- Click “add note” to type your note. These notes also provide formatting options.
- When complete, select “done.”

You can see that notes have been added when the “notes” icon switches from a blank page icon to a page icon with notes. Hovering over or selecting the notes pages will also display the content.
Remember that notes typed into Degree Works should focus solely on requirements necessary to complete the degree.

Making Deletions
At times, you may need to delete a component in the plan.

To **delete a particular component in the plan**:

- Click the component you wish to delete.
- Select the “minus” icon at the top of the individual term.

Viewing the Plan Terms
At any time, you can collapse your view of a term by selecting the blue arrow next to the term name.

You can then select the blue arrow beside a given term to see the items you have built in that term.

What Other Views Are Available in the Degree Works Planner?
Once you have a saved plan, you can toggle between different views.

There are 4 view options:

The two primary views are the “Edit” and “Calendar” views.

- **Edit** – The “edit” view is the default view when you create a new plan. The “edit” view is where you will build and revise a plan.
- **Calendar** – The “calendar” view is the default view when you open an existing plan. Calendar view shows a semester-by-semester glance for an already existing plan. The calendar view is also suitable for printing.

Two additional view options include the “Audit” and “Notes” views.

- **Audit** – The “audit” view will place side-by-side the student’s refreshed audit and the plan you have constructed. In this view, you can “drag and drop” already planned courses between terms. If you move courses in this view, be sure to select “save” and allow the plan to update.
- **Notes** – The “notes” view will show the semester-by-semester plan while displaying all notes applied to a particular course, a particular term, or the plan at large. This view can also be printed.

Returning to a Student’s Plans
A student may have multiple plans on their record.

If you are in an existing plan:

- Select the “View Plan List” button or select the “Plans” tab once more.

From anywhere in DegreeWorks:

- Select the “Plans” tab to see a full view of the student’s degree plans. Double click on a plan to open it.

How Do I Make Adjustments to a Developed Plan?

Modifying, Deleting, Locking, Activating

Advisors will often need to leverage these functions when working with a student’s plan. Let’s take a moment to explain what each function does.

Modify an unlocked plan or a plan that you have locked by double clicking the plan. Then, move to the “edit” view to make adjustments.

Delete an unlocked plan or a plan that you have locked by single clicking the plan and then clicking “delete”. *Please note that a University-wide best practice is to not delete prior major plans after a major change occurs. The prior plan could be leveraged as a historical tool when reviewing advisement records.*

Locking a plan “locks in” what you have developed and limits modification to only those individuals who can also lock plans. Students are unable to lock plans. As a result, when an advisor locks a plan, it will prevent the student from making modifications post-advisement.

To lock a plan:

- Select the desired plan and move to the “edit” view.
- At the top of the “edit” view, select “locked” to limit its modification or deletion.
- Select “save” to record the status changes.
- Please note that the University-wide best practice regarding locking plans is that the individual who initially locked the plan should be the continued modifier unless there is an advisor change.

When you navigate back to the “Plans” tab, you will now see the plan is locked, indicated in the status column.

To unlock a plan:

- Navigate to that plan.
- Move the drop down menu to the “edit” view and de-select the “locked” checkbox.
- Click “save” to record the status change.

Please note: Only the individual who locked the plan can unlock it to permit modifications.

Activating a plan makes it the “default” view if a student has multiple plans. As a result, the plan that is the most relevant for the student’s progression at that time should be the only active plan. Making a plan active also assists with course forecasting.

To activate a plan:

- Select the desired plan and move to the “edit” view.
- At the top of the “edit” view, select “active”.
- Select “save” to record the status changes.

When you are in the “Plans” tab, you will now see that the plan is active, indicated by a “Y” in the “Active” column.

Continued Modifications to Existing Plans

Each semester, you may return to prior developed plans to make edits or continue advisement.

- With the student’s DegreeWorks record open, select the “Plans” tab. If multiple plans exist, double click the desired plan.
- Navigate to the “edit” view to make modifications. The plan will then be updated to note you as the most recent author.

The full plan listing will display:

- Whether the plan is active
- When it was last modified
- Who modified that plan
- And whether the plan is locked or unlocked.