DegreeWorks
Student Educational Planner (SEP)
Demonstration Topics

☐ Schedule of Events:

<table>
<thead>
<tr>
<th>Week of:</th>
<th>Topic:</th>
<th>Audience:</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/25/17-9/29/17</td>
<td>Pilot training</td>
<td>Selected Advising Coordinators</td>
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<tr>
<td>10/2/17-10/6/17</td>
<td>SEP software available in TEST/PROD</td>
<td>All Advising Coordinators</td>
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<tr>
<td>10/9/17-10/20/17</td>
<td>Campus training</td>
<td>All Advising Coordinators</td>
</tr>
<tr>
<td>10/23/17-10/27/17</td>
<td>SEP software and all support resources available in PROD</td>
<td>All Campus Advisors</td>
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<tr>
<td>10/23/17-11/17/17</td>
<td>SEP campus training</td>
<td>All Campus Advisors</td>
</tr>
<tr>
<td>1/08/18 - 1/26/18</td>
<td>Template Management training</td>
<td>All Advising Coordinators</td>
</tr>
<tr>
<td>Spring 2018</td>
<td>SEP software and all support resources available in PROD</td>
<td>All Students</td>
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</tbody>
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☐ Context and Terminology:

- degree planning vs. registration planning.
- Student Educational Planner/SEP is the degree planning tool
- The registration planning tool is a part of CyberBear for Faculty and Advisors (*scheduled for release Spring 2018)
- SEP is built on templates. Similar to our old “Suggested Course of Study” catalog sections

☐ Templates: Create a Plan ~ Start with a Template

- The templates are specific to the catalog year, degree and major.
- The initial sets of templates were drafted by the Office for Student Success.
  - One set or templates for 4-year degree plans for each primary undergraduate major
  - A second set of templates for the New Freshmen’s 1st semester “Core Courses”
- The Advising Coordinators for each major will eventually take over the Template Management. A separate training to manage these templates will be offered in January 2018. After completion, these must be submitted and approved by the Dean or Dept. Chair, and then the Registrar’s Office.

Questions?
Adding a Plan Template to a student’s DegreeWorks account

- Search and Select features

- *CAUTION* – when using the keyword search, the Catalog Year value in the resulting list is the **last** year of the catalog term. For example, the 2014/15 catalog year will display **Catalog Year 2015**

Student Planner – View

- Once the template is loaded on the student’s record, click on **Save**.
- Edit the student’s plan
- Active and Locked features
- Four planner views:
  - **Edit** – the initial view after a plan template is loaded onto a student’s record. Used to make changes to the plan after it is saved on the student’s record.
  - **Calendar** – displays the plan in a semester per year view.
  - **Audit** – displays the degree audit requirements side-by-side with a calendar view of the degree plan.
  - **Notes** – displays all advising notes associated with the plan template

- When in **Edit** view there are 3 main sections of the plan
  - Plan Summary section
  - Term section
  - Requirements section

- There are three icons that control **add**, **delete** and **notes** on: the Plan, the Terms and the Requirements

Types of Requirements:
- Choice
- Course
- GPA
- Placeholder

Questions?
- Types of Placeholder Requirements:

<table>
<thead>
<tr>
<th>Placeholder Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Writing Course</td>
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<tr>
<td>Comment</td>
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<tr>
<td>Course range</td>
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<tr>
<td>Elective</td>
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<tr>
<td>Upper-Division Elective</td>
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<tr>
<td>Gen Ed Requirement</td>
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<tr>
<td>Introductory Writing Course</td>
</tr>
<tr>
<td>Intermediate Writing Course</td>
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<tr>
<td>Major Elective</td>
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<tr>
<td>Program Requirement</td>
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- Alternate Views:
  - Calendar
  - Notes
  - Audit

- Editing the Student’s Plan
  - Add Requirements
    - Still Needed List
    - Courses List
  - Change Requirements
    - Reassigning a term
    - Moving a requirement to a different term
  - Delete Requirements
  - Add/Change Notes

- Additional topics as time allows
  - Save As & Plan List
  - Advanced Search
  - Features of alternate views
  - Locking and Tracking
  - Printing

Questions?