



Student Educational Planner User Guide for Staff & Faculty

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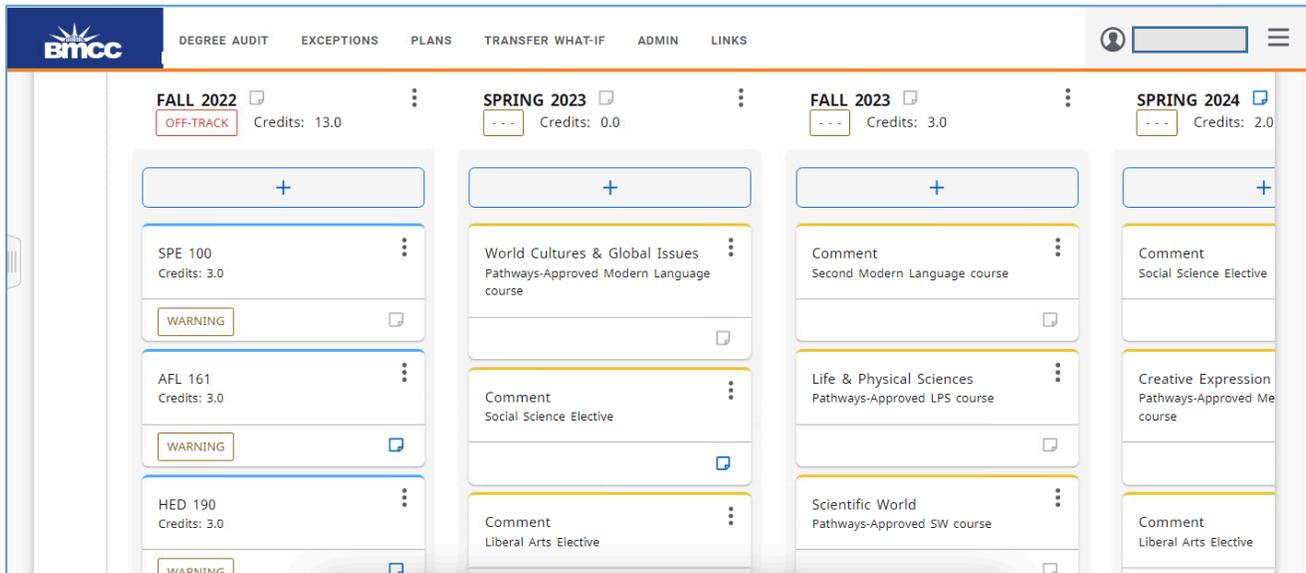
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Introduction

What is the Student Educational Planner (SEP)?

The Student Educational Planner (SEP), is a feature of the current version of *DegreeWorks*. The SEP helps advisors and students work together to plan each term of coursework to ensure student success. By developing a plan, students will have a clear path of coursework needed in sequential order. In addition, advisors can use the features in the plan identify courses that are essential to students' timely degree completion.



As you begin to explore the SEP, this guide will assist you with learning how to use the system to plan future classes, keep track of requirements, and record notes for students regarding their academic records.

If you experience any difficulty, or have any questions/feedback about SEP, please email dwhelp@bmcc.cuny.edu.

What's New?

Familiar with DegreeWorks SEP on our previous version of DegreeWorks? Other than the new look and responsive dashboard, here are some notable changes on SEP between DegreeWorks 4.1.6 (old version) and DegreeWorks 5.0.7 (new version)

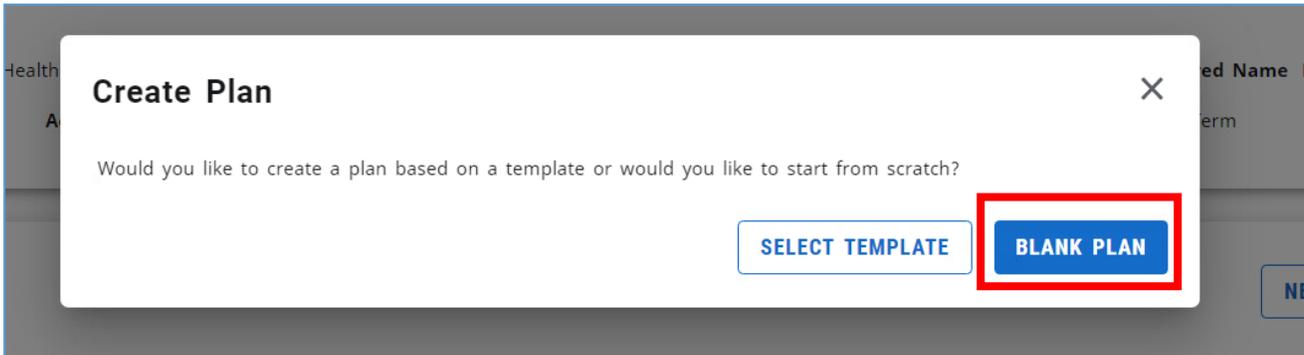
1. Plans autosave! No need to be constantly clicking that save button for fear that it will time out and you'll lose your plan! Be careful, though, as it is now easy to accidentally save over a plan previously created simply by making a change on the plan. If you wish to create a modified version of an existing plan, you'll need to click the *Save as copy* button BEFORE modifying the plan. When creating new plans, as soon as the plan page successfully loads, the plan has saved to the plans list. If you load a template but do not edit it or create a plan with no intention of having the plan saved, please be sure to navigate to the plans list to delete the created plan.
2. There are no longer distinct "views" to choose from (*Calendar, Edit, Notes, Audit*), though the Audit view of the Plan is still available as a pop-up link at the top of the Plan. As a *Notes* view no longer exists, it is no longer possible to view a complete plan with all notes visible on one screen. PDFs cannot be created or printed with notes. A user *must* log into DegreeWorks and click on the note icon to view a note on a plan.
3. The sidebar is now on the left side of the screen. The **Requirements option**, which includes *course, choice, GPA, and placeholder*, is now located on the sidebar instead of the term header. The **Still Needed option** is also still located in this sidebar.

Creating a New Plan

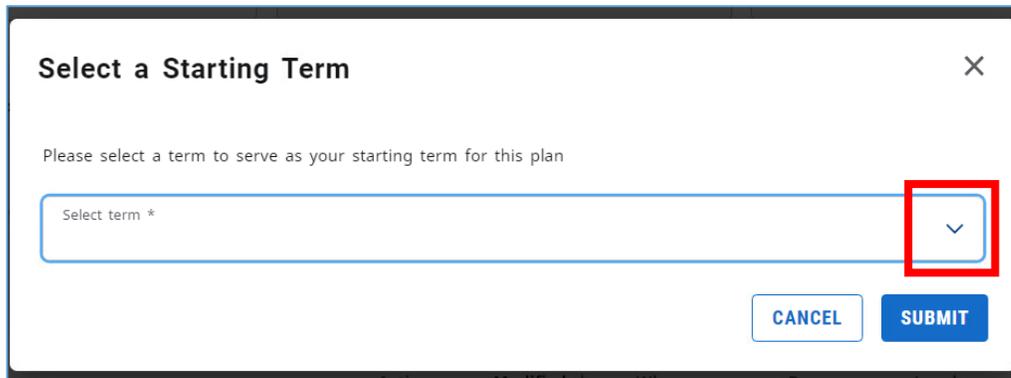
There are two different options for creating a new plan: *Blank Plan* or *Select Template*. *Blank Plans* are useful for students that are already in progress towards their degree completion, while *Templates* will be most beneficial to new students who have not yet started their academic career at BMCC.

Creating a Blank Plan

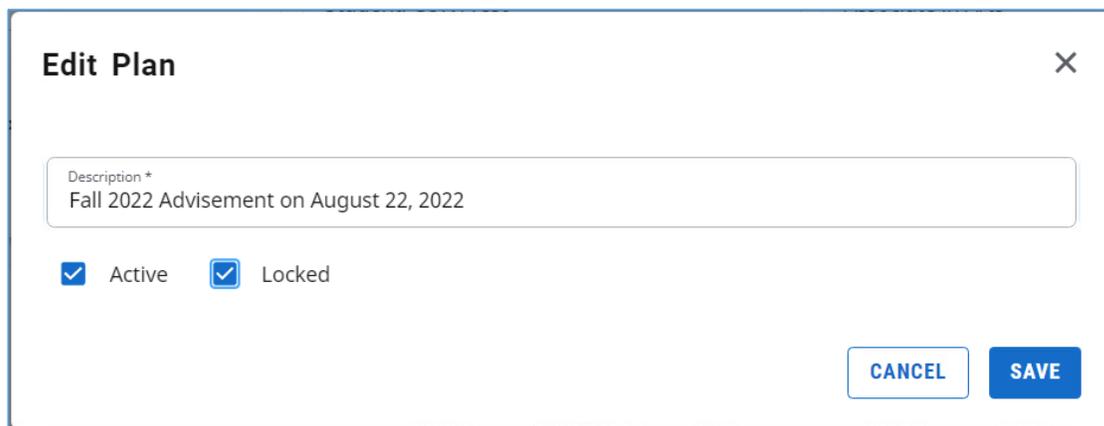
1. Begin by logging into DegreeWorks.
2. Enter CUNYfirst ID (EMPLID) number into the Student ID field.
3. Select the *PLANS* link at the top of the page to open the Plan List page.
 - a. Previously created plans will appear in the list. If there are no previous plans for the student, the list will be blank. Create a new plan by selecting *NEW PLAN* in the upper right corner.
 - b. Select *BLANK PLAN*.



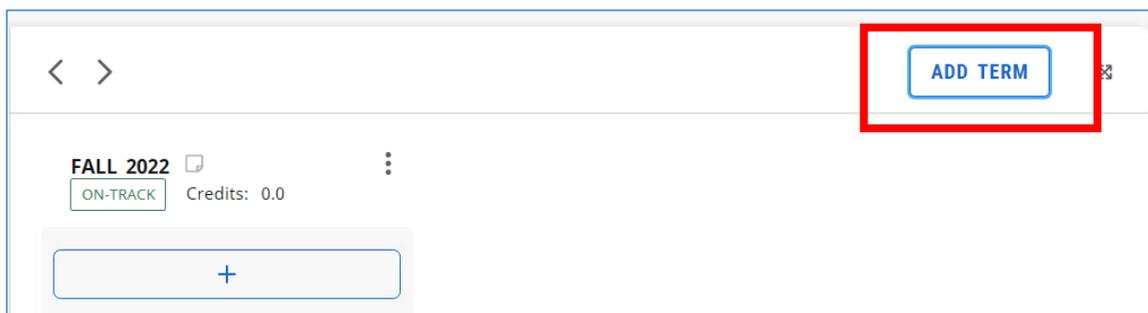
4. Select a starting term for plan and click submit.



5. Name the plan by entering text such as “Fall 2022 Advisement on August 22, 2022” in the *Description* box and check off the Active and Locked boxes. Click *SAVE* to open to start creating the plan.



6. Click the *ADD TERM* button if you wish to create an advisement plan with multiple terms. You can repeat this step for as many terms as you need to create for the plan.



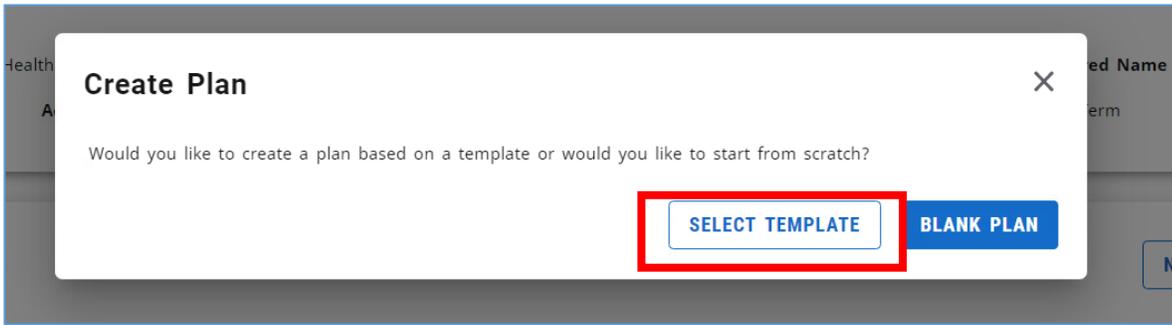
7. After selecting the term(s), you will see them appear next to the initial term.

Creating a Plan from a Template

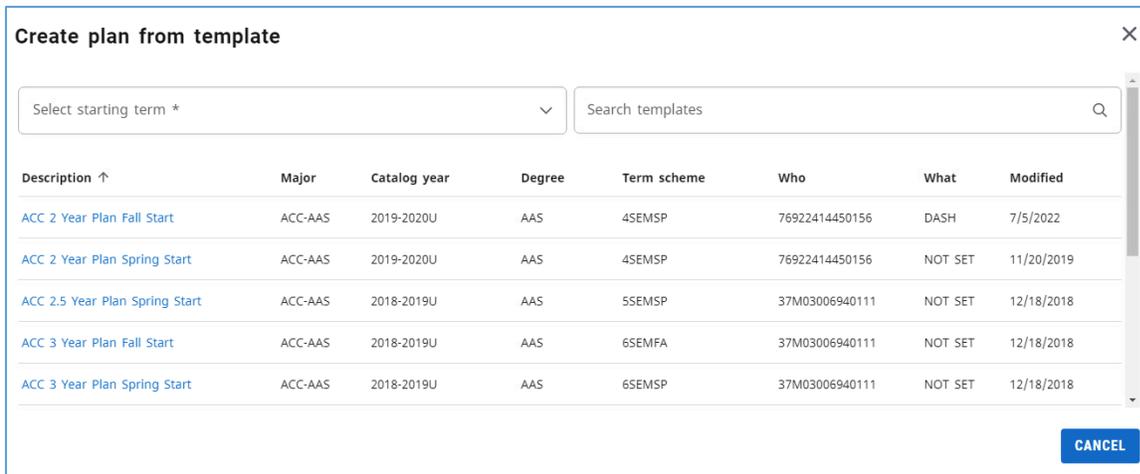
A template is the DegreeWorks equivalent of a degree map. Once applied to a student’s record, it is adjustable.

Selecting a Template

1. Begin by logging into DegreeWorks.
2. Enter the CUNYfirst ID (EMPLID) number in the Student ID field.
3. Select the *PLANS* link at the top of the page to open the Plan List page.
 - a. Previously created plans will appear in the list. Create a new plan by selecting *NEW PLAN* in the upper right corner.
 - b. Click *SELECT TEMPLATE*.



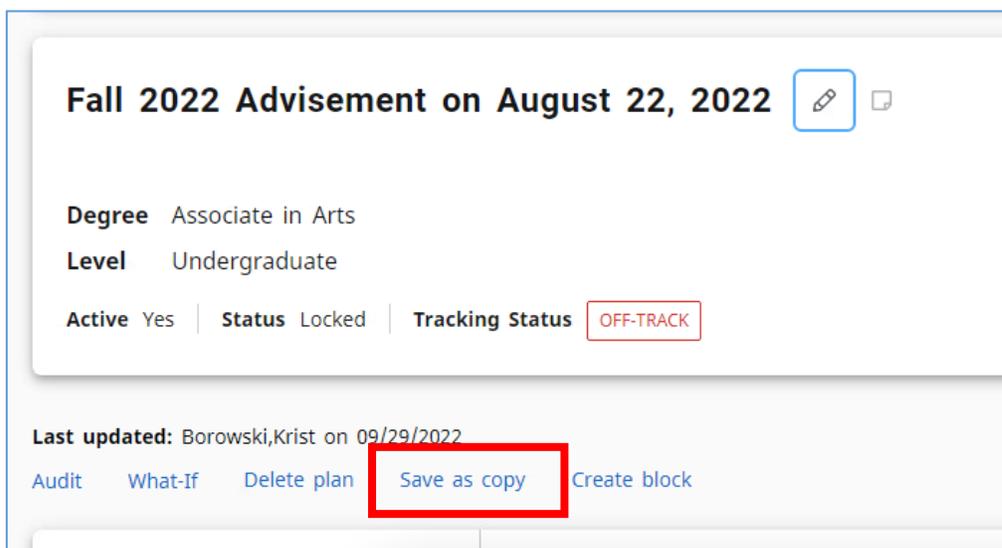
5. Select the term you're advising the student for from the starting term pull-down menu. To find the appropriate template, you can scroll through the list of templates or type the FOMI code associated with the major in the "Search templates" search box (e.g. CRJ). Click the description for the desired template to open the template into a new plan. Please note, you must select the appropriate template (fall start or spring start) based on the start term you've selected from the above pull-down menu. Now that the template has been applied, it is now possible to adjust as needed, following the instructions for "Editing a Plan."



Editing a Plan

Save as Copy

Before you begin editing, please note: Each time a modification is made to a plan, the plan will autosave. If you wish to make modification to a plan but keep the original version saved, click the Save as copy link below the plan header and continue to make the desired changes.

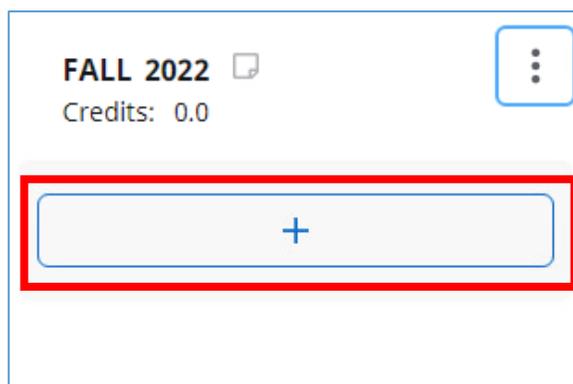


Once a plan is created, you may edit using the *drawer* or the *sidebar*.

Adding courses using the Drawer

This option will display courses that are still needed for the degree based on courses taken or advised for based on the *current major* in the system.

1. To add a course using the drawer, click the button below the term header of which you're advising.



2. As with other aspects of DegreeWorks, this will show all courses needed for degree completion and will not check for prerequisite eligibility. Check off courses you wish to add to the plan and scroll to the bottom of the window and click **ADD TO PLAN**.

Add requirements to FALL 2022 ✕

<input type="checkbox"/>	Course BIO 110	Title General Biology	Credits 4
Observing Children - 1 Course in			
<input type="checkbox"/>	Course EDU 201	Title Observing Children Development	Credits 4
Schools in Diverse Society - Bilingual - 1 Course in			
<input checked="" type="checkbox"/>	Course EDB 202	Title Bilingual Edu In Urban School	Credits 4
Art in Education I - 1 Course in			
<input checked="" type="checkbox"/>	Course EDU 203	Title Art in Education	Credits 3

MAT 214.5 ✕ EDU 203 ✕ EDB 202 ✕

Adding courses using the Sidebar

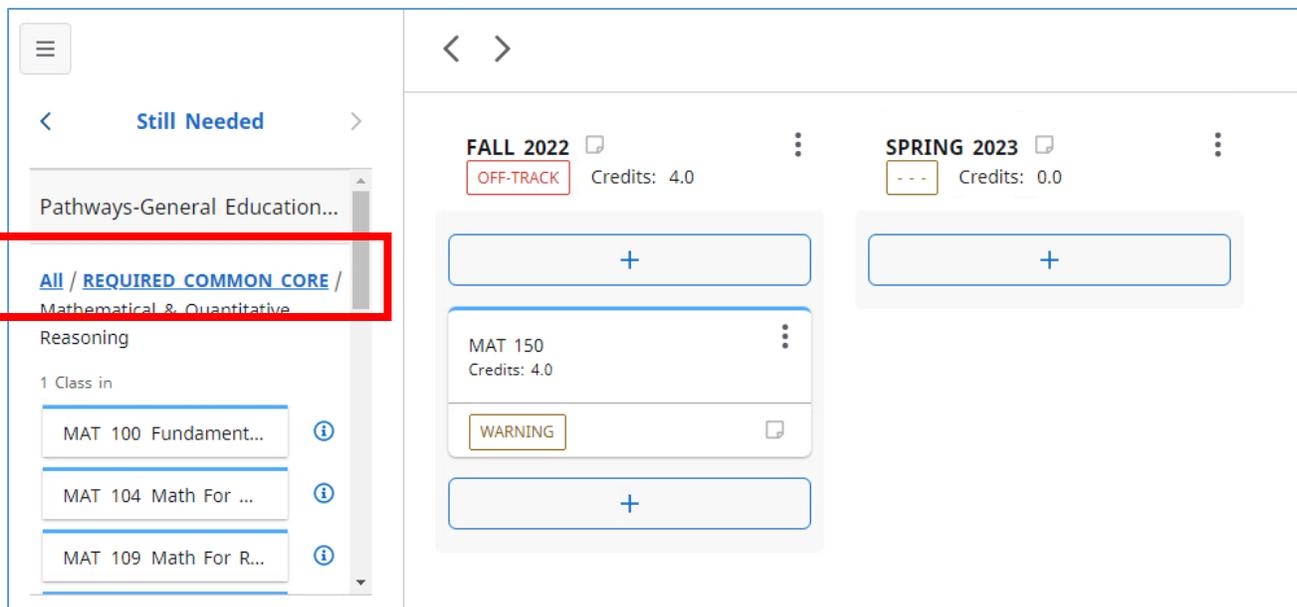
The Sidebar, located on the left side of the plan, can be collapsed and/or expanded, and is the primary mode of adding courses to the advisement plan.

Still Needed

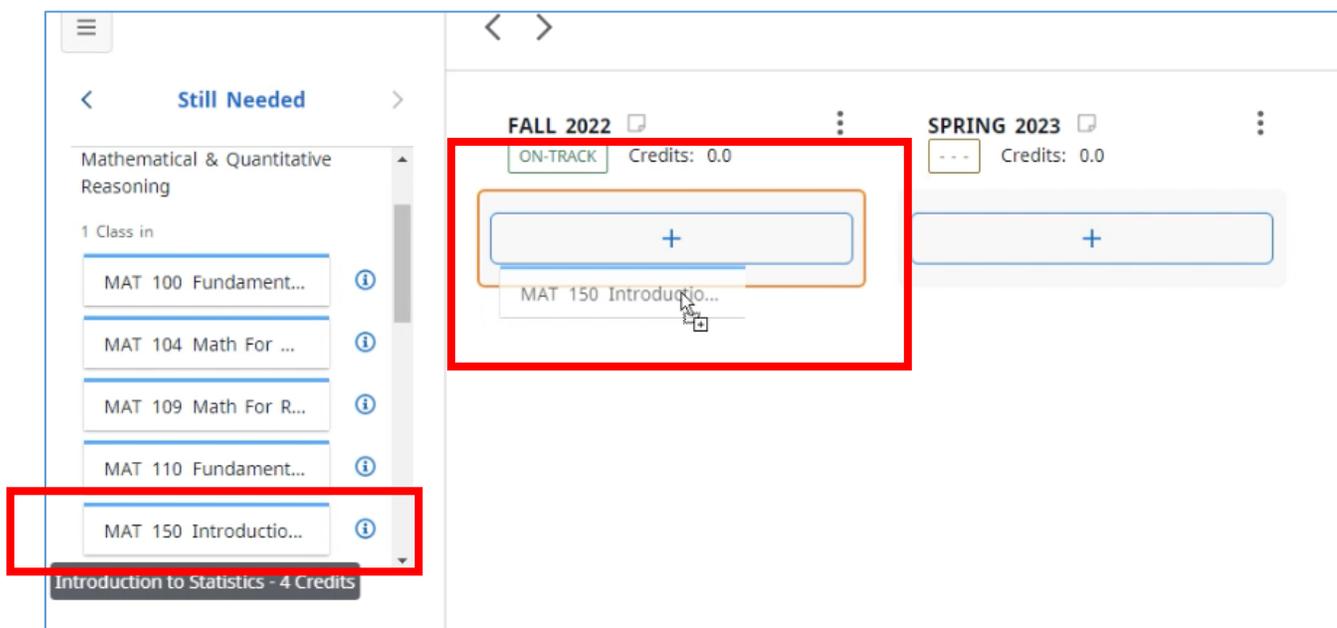
- In addition to the *Drawer*, You can also view *Still Needed* courses for the current degree in the Sidebar. To add a course using the *Still Needed* requirement area on the sidebar, navigate to the left side of the *Plans* page. You can scroll up and down to view requirements still outstanding for degree completion based on currently enrolled/completed courses as well as any courses that are already in the plan. Click the > to navigate to more specific requirements until you reach the course level.

REMINDER: The Still Needed menu will only display requirements that have not been taken or planned for in the *current* major. If you are advising for a change of major, this menu should not be used.

2. Click the links on the top of the sidebar panel to navigate to previous screens to view other *still needed* courses.



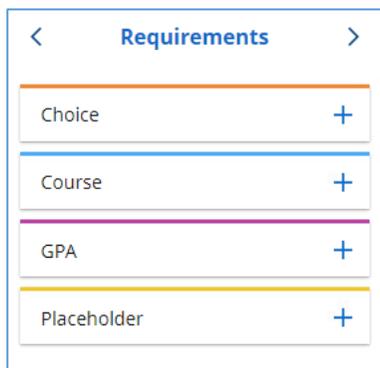
3. To add a class to a term, select the class from the *Still Needed* menu on the left and use the drag and drop method to drag the course to the column of the term desired, then 'drop it' into that term.



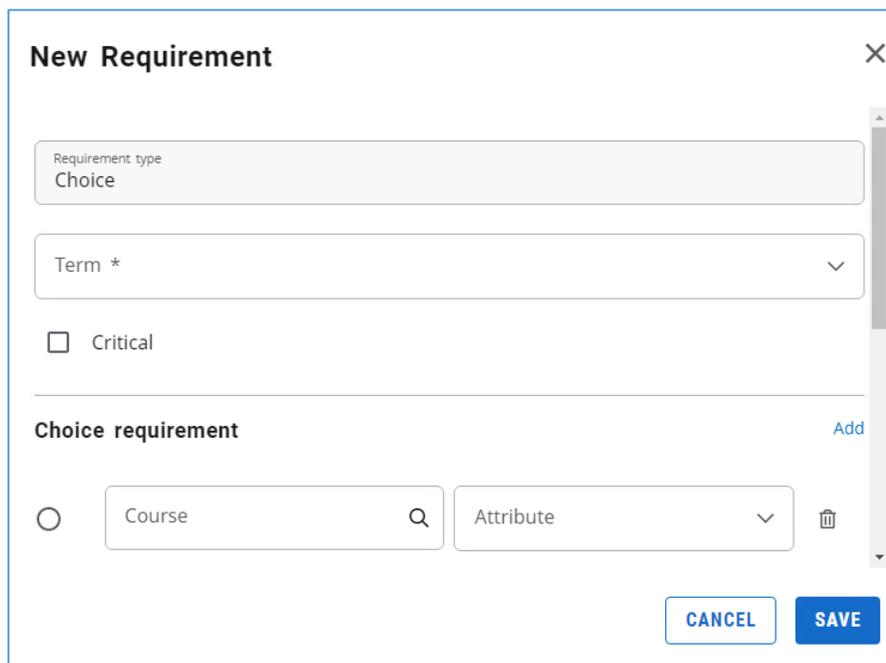
4. Continue adding classes from the *Still Needed* menu until you are satisfied with the plan.

Requirements Option

After starting a plan, select the < symbol in the sidebar on the left of the page to navigate to the Requirements option. The following options will appear: Choice, Course, GPA, and Placeholder. Click the plus + next to the desired requirement option to start created your advisement plan OR drag and drop the requirement into the term desired.



1. Use the Choice requirement option when the student has an option between two or more classes during a given semester.

A screenshot of a "New Requirement" form. The form has a title bar with "New Requirement" and a close button (X). Below the title bar, there is a "Requirement type" field with "Choice" selected. Below that is a "Term *" dropdown menu. A "Critical" checkbox is present and unchecked. A horizontal line separates the "Choice requirement" section, which includes a radio button, a "Course" search field, an "Attribute" dropdown menu, and a trash icon. At the bottom right, there are "CANCEL" and "SAVE" buttons. A vertical scrollbar is visible on the right side of the form.

- a. Select the term for the courses you plan to advise. If you drag and drop the requirement into the term, the term field will be pre-loaded.
- b. Check off the "Critical" box if the course is essential to complete in that term for the plan.

- c. In the “Course” box, enter the first course, separating discipline and number by a space (e.g. “ENG 101”) and wait for the course to load below the box. Select the course or press tab on your keyboard once the course populates, then select “Add” in the upper right-hand corner to add another course option.

Choice requirement Add

- d. Follow the previous step to add another course. Click **SAVE** when you’ve completed adding all choice options.

Choice requirement Add

[Add a paired course or lab](#)

[Add a paired course or lab](#)

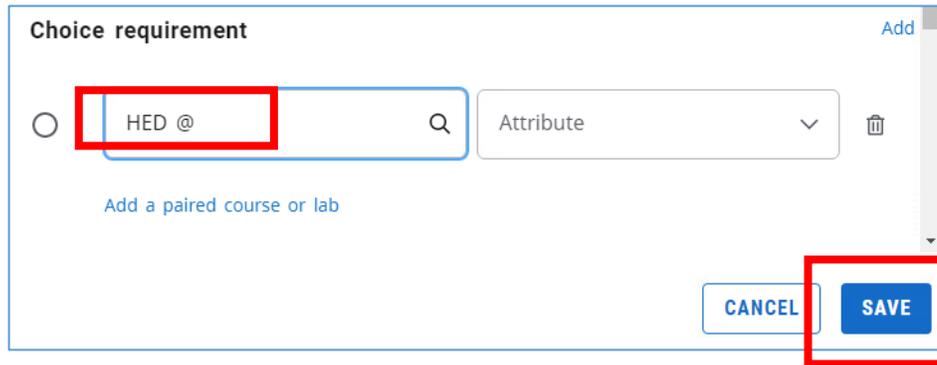
The choice requirement now appears on the plan. The credit amount for choice requirements will not be added or calculated into the term header unless manually added. To add the credits or make other modifications to the advised choice requirement, click the symbol and click “Edit this requirement.”

FALL 2024 Credits: 0.0

MAT 150 or MAT 161

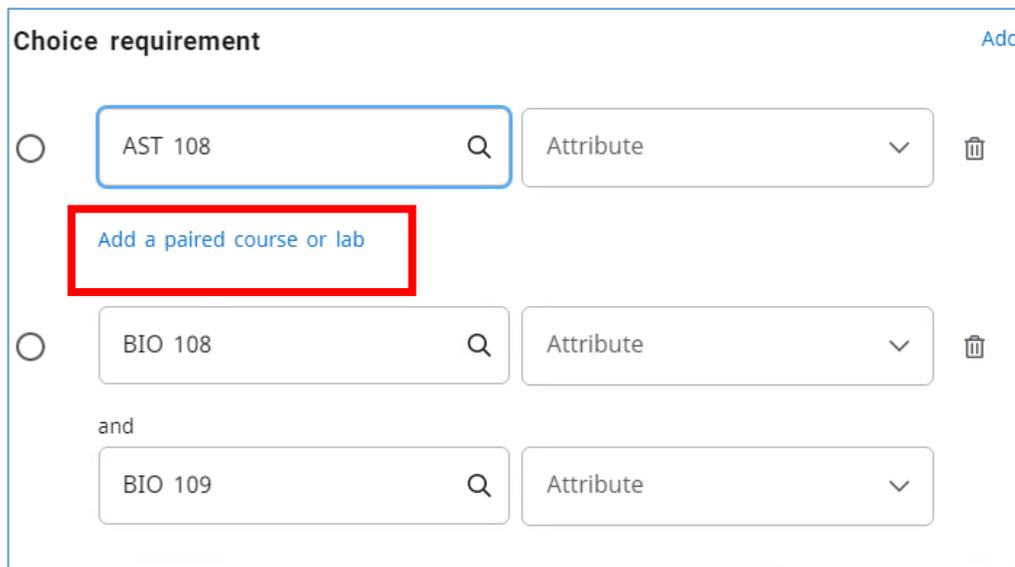
More information

- e. The choice requirement is also the option you would use to advise for a wildcard (@). For example, if a student can take any Health Education course to fulfill a requirement, you can type HED @, then click **SAVE**.



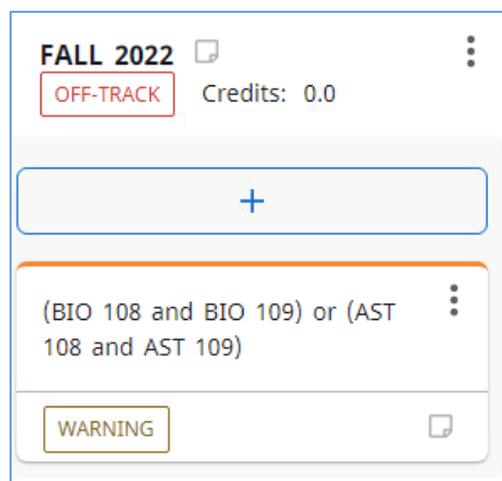
The screenshot shows a 'Choice requirement' dialog box. At the top right is an 'Add' button. Below it is a search field containing 'HED @' with a magnifying glass icon. To the right of the search field is a dropdown menu labeled 'Attribute' and a trash icon. Below the search field is a link that says 'Add a paired course or lab'. At the bottom right are two buttons: 'CANCEL' and 'SAVE'. The 'SAVE' button is highlighted with a red box.

- f. If there are courses that are co-requisites, you can use this option to advise the student for both classes. Select "Add a paired course or lab" to add co-requisite classes to the plan.



The screenshot shows the 'Choice requirement' dialog box with three search fields. The first field contains 'AST 108', the second 'BIO 108', and the third 'BIO 109'. Each field has a magnifying glass icon and is followed by an 'Attribute' dropdown menu and a trash icon. Between the second and third search fields is the text 'and'. A red box highlights the link 'Add a paired course or lab' located below the first search field.

After all options are added, click **SAVE** and the plan will result as shown below.



The screenshot shows a course plan for 'FALL 2022'. At the top right is a three-dot menu. Below the semester is a red box labeled 'OFF-TRACK' and the text 'Credits: 0.0'. In the center is a large button with a plus sign '+'. Below that is a choice requirement: '(BIO 108 and BIO 109) or (AST 108 and AST 109)'. At the bottom is a yellow box labeled 'WARNING' and a document icon.

Again, add the minimum credits needed to fulfill this requirement by clicking the three dots in the upper right-hand corner of the choice requirement.

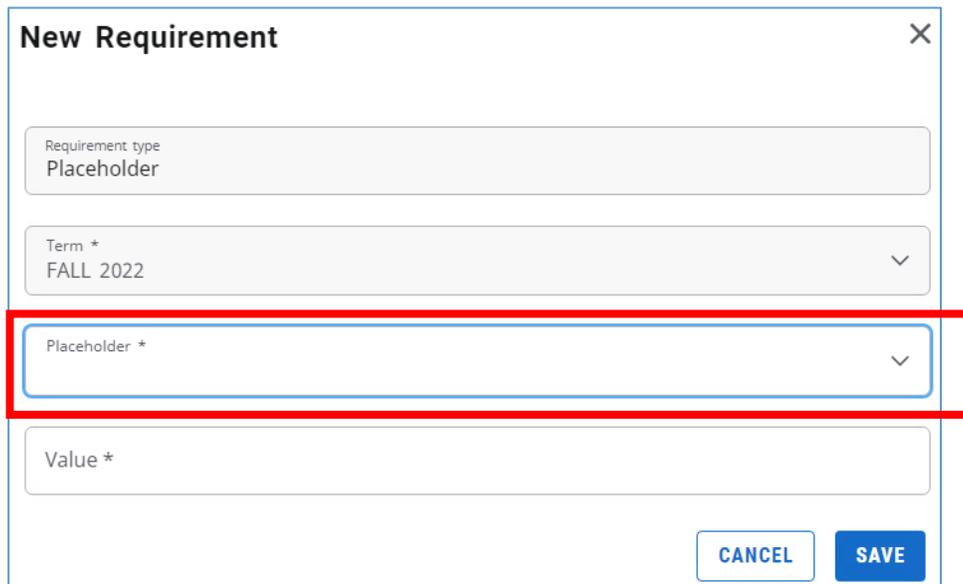
2. Use the **Course** requirement option in the sidebar if you prefer to type in the exact course number rather than using the *Still Needed* option in the sidebar or drawer. Type the course (e.g. MAT 150) and wait for the course to load before selecting the course or hitting tab on the keyboard. Click **SAVE** to add the course to the plan. The credits will automatically populate in the credits box using this option.

The screenshot shows a 'New Requirement' dialog box. The 'Requirement type' is 'Course'. The 'Term' is 'SPRING 2023'. A search box contains 'MAT 150'. Below the search box, a dropdown menu is open, showing 'MAT 150 Introduction to Statistics' and 'MAT 150.5 Intro Statistics w/ Algebra'. The 'Critical' checkbox is unchecked. 'CANCEL' and 'SAVE' buttons are at the bottom right.

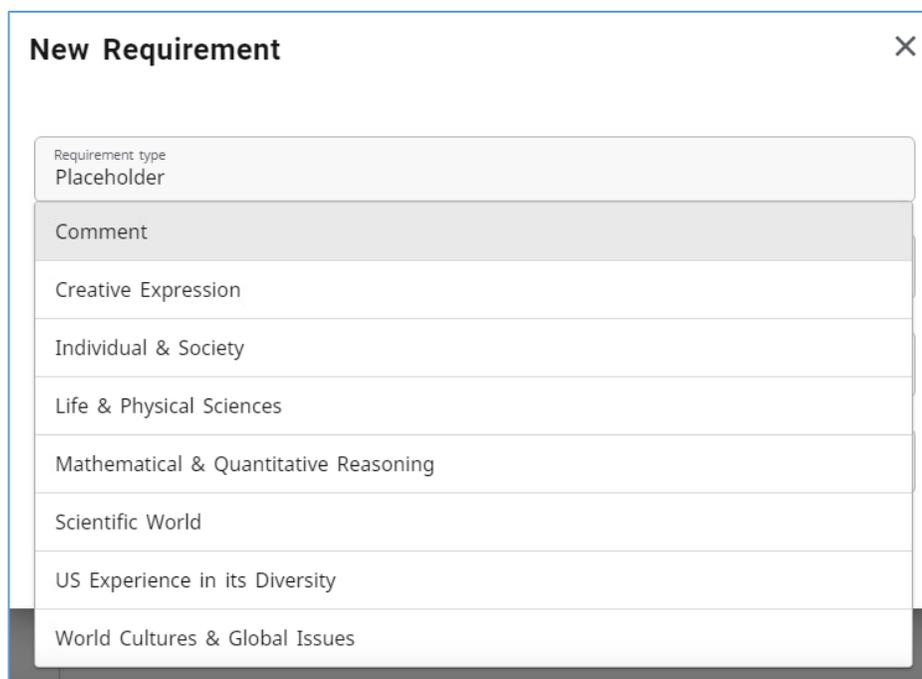
3. Use the **GPA** requirement option to advise students for a minimum cumulative GPA. This may be recommended for students who are on academic probation and need a minimum GPA of 2.0 or for students who are part of a scholarship program that may require a higher GPA to maintain their status in the program.

The screenshot shows a 'New Requirement' dialog box. The 'Requirement type' is 'GPA'. The 'Term' is 'FALL 2022'. The 'GPA type' is 'Overall GPA - Student System'. The 'Minimum GPA' is '2.0'. The 'Critical' checkbox is unchecked. 'CANCEL' and 'SAVE' buttons are at the bottom right.

4. The **Placeholder** requirement is used in a template to indicate a general education category that needs to be fulfilled. These should not be used when creating plans, if possible, because credits will not be calculated in the plans, the course/placeholder will not appear on the audit, and cannot be pulled into Schedule Builder, as no specific course is being advised.



The screenshot shows a 'New Requirement' form with the following fields: 'Requirement type' (Placeholder), 'Term *' (FALL 2022), 'Placeholder *' (highlighted with a red box), and 'Value *'. There are 'CANCEL' and 'SAVE' buttons at the bottom right.



The screenshot shows the 'New Requirement' form with the 'Placeholder *' dropdown menu open. The menu lists the following options: Creative Expression, Individual & Society, Life & Physical Sciences, Mathematical & Quantitative Reasoning, Scientific World, US Experience in its Diversity, and World Cultures & Global Issues.

Moving a course to a different term

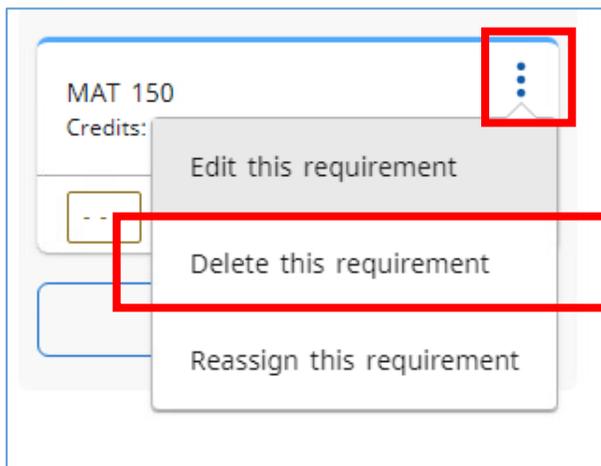
To move a course between two different terms, it must already be part of the plan.

1. Select the course from the current term.
2. Drag and drop it into the desired term
 - a. NOTE: The term must already exist in the plan. If it does not, refer to instructions in the *Creating a Blank Plan* section of the manual to add a term.

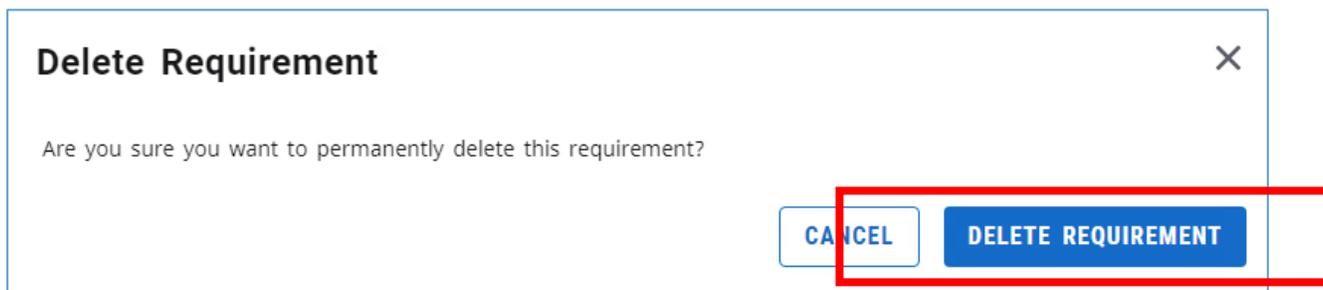
Deleting a course

To delete a course from a term:

1. Click the three dots in the upper right-hand corner of the course and select “Delete this requirement.”



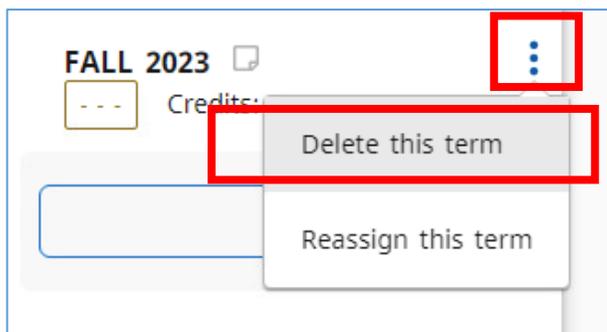
2. You will get a pop-up asking if you wish to permanently delete the requirement, click the *DELETE REQUIREMENT* button to remove the course from the plan.



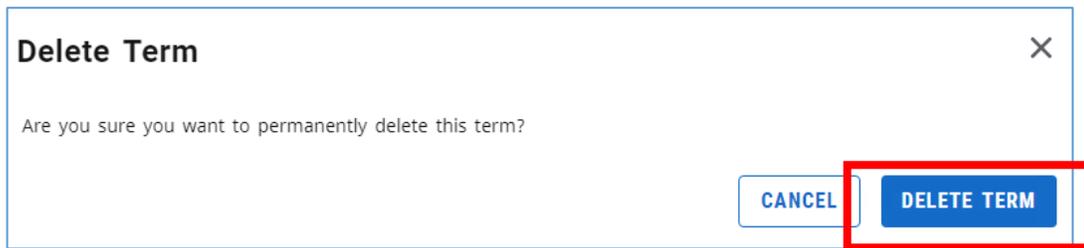
Deleting a term

To delete a term:

1. Click the three dots in the upper right-hand corner of the term and select “Delete this term”.

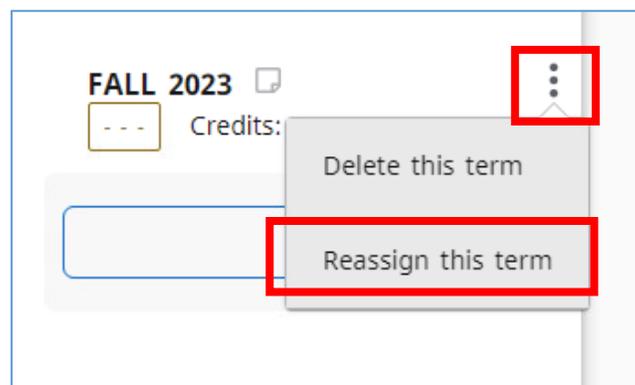


2. You will get a pop-up asking if you wish to permanently delete the term, click the *DELETE TERM* button to remove the term from the plan.

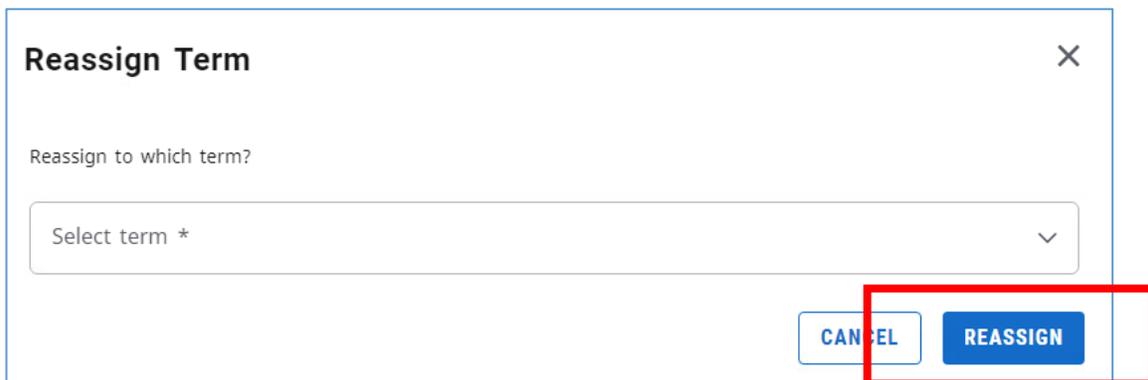


Reassigning a term

1. Click the three dots in the upper right-hand corner of the term and select "Reassign this term".

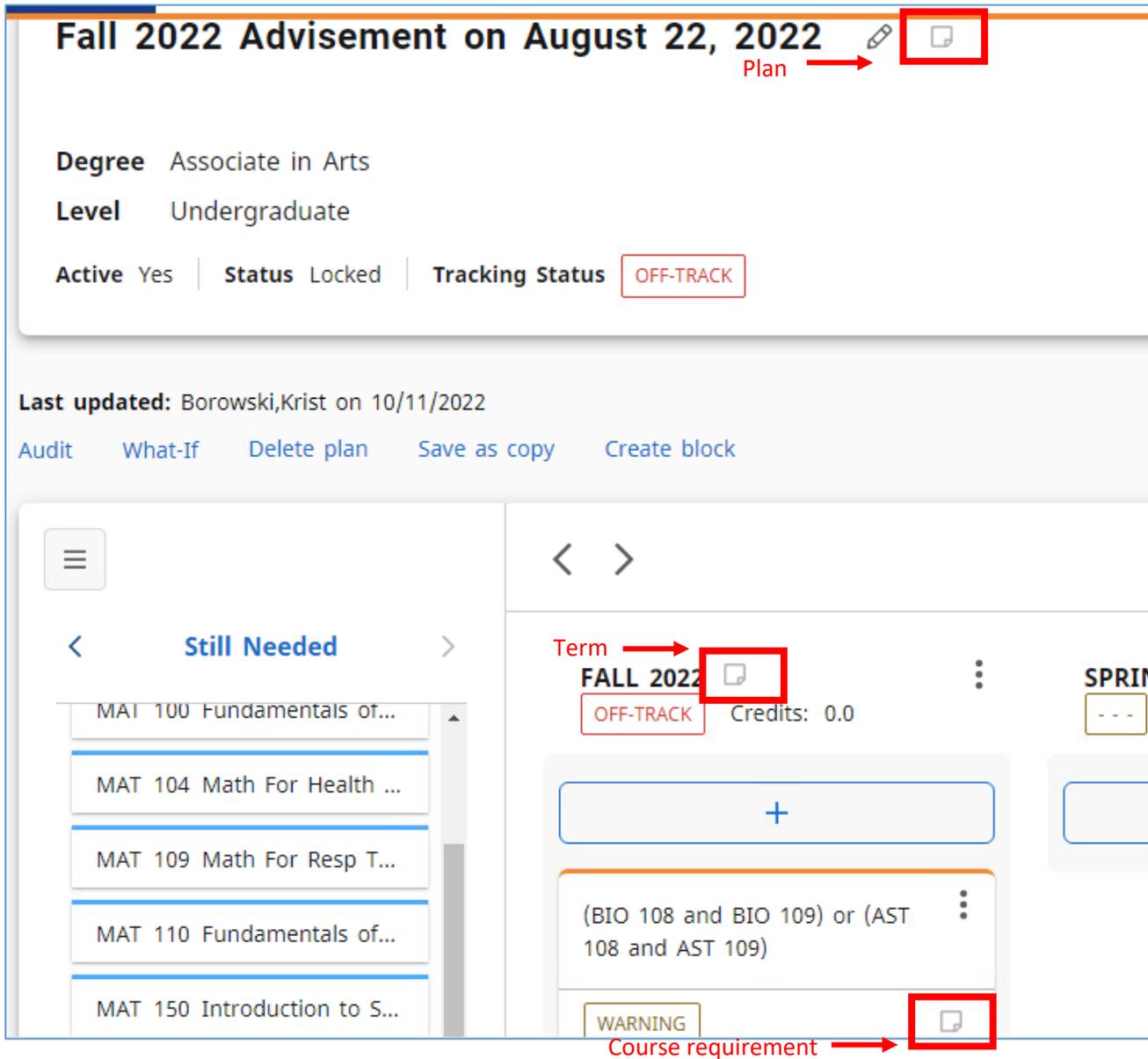


2. Select the desired term from the pull-down menu and click *REASSIGN*.



Creating Notes

Notes can be added on the plan, term, and/or course requirement level. To create a note, click on the paper symbol  on the right side of the plan, term, or course.



The screenshot shows the 'Fall 2022 Advisement on August 22, 2022' page. At the top, the word 'Plan' is highlighted with a red arrow pointing to a paper icon in a red box. Below this, the degree is 'Associate in Arts' and the level is 'Undergraduate'. The tracking status is 'OFF-TRACK'. The page is last updated by Borowski, Krist on 10/11/2022. Action buttons include 'Audit', 'What-If', 'Delete plan', 'Save as copy', and 'Create block'. On the left, a 'Still Needed' list shows courses like MAT 100, MAT 104, MAT 109, MAT 110, and MAT 150. On the right, the 'Term' 'FALL 2022' is highlighted with a red arrow pointing to a paper icon in a red box. Below the term, a course requirement '(BIO 108 and BIO 109) or (AST 108 and AST 109)' is shown with a 'WARNING' label and a paper icon in a red box. A red arrow points from the text 'Course requirement' to this icon.

Click **ADD A NEW NOTE**, type your note, then click **SAVE NOTE**.



The screenshot shows a 'Plan notes' dialog box with a close button (X) in the top right corner. The text inside says 'There are no notes.' At the bottom right, there is a blue button labeled 'ADD A NEW NOTE' which is highlighted with a red box.

If a note has been created, the note icon will now be blue like this: 

Additional links

Audit

To see how the planned classes will fulfill the remaining requirements, click the *Audit* link in the under the plan header.

Fall 2022 Advisement on August 22, 2022 [edit] [share]

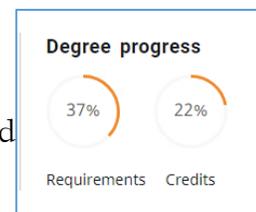
Degree Associate in Arts
Level Undergraduate
Active Yes | **Status** Locked | **Tracking Status** OFF-TRACK

Last updated: Borowski, Krist on 09/29/2022

Audit What-If Delete plan Save as copy Create block

A Planner Audit will open in a *new* tab.

- You will see an increase in the percentage on the Degree Progress area in the header.
- You will see the  symbol next to the planned requirements along with the class and the courses will say *PLAN* in the grade column of the audit.

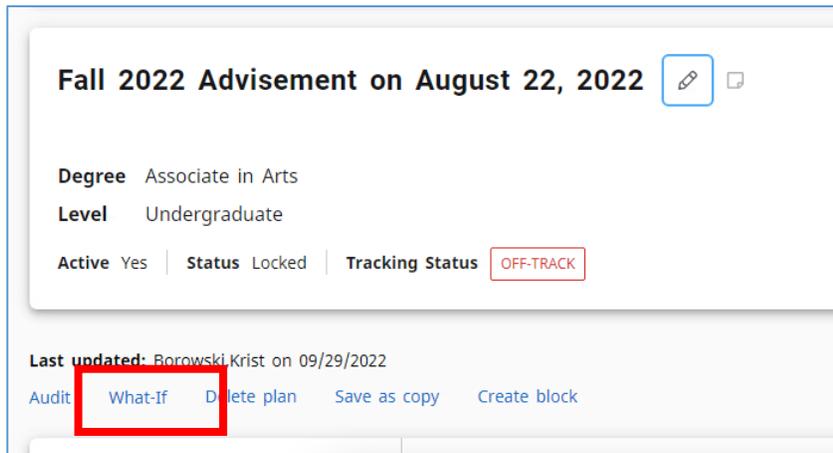


 Introduction to Literature						
 Mathematical & Quantitative Reasoning	MAT 150	Introduction to Statistics	PLAN	(3)	FALL 2022	
 Life & Physical Sciences	Still needed:	3 Credits in AST 109 or 110 or BIO 109 or 111 or 210 or 220 or 230 or 240 or 2420 or 425 or 426 or BTE 201 or CHE 109 or 118 or 120 or 121 or 201 or 202 or 230 or 240 or GLY 210 or PHY 109 or 110 or 210 or 215 or 220 or 225 or 240 or 400 or SCI 120 or 121 or 140 or 430				

Close the tab or click on the previous tab to go back to the editable plan.

What-If

To see how the planned classes will fulfill requirements for a different major, click the *What-If* link below the plan header.

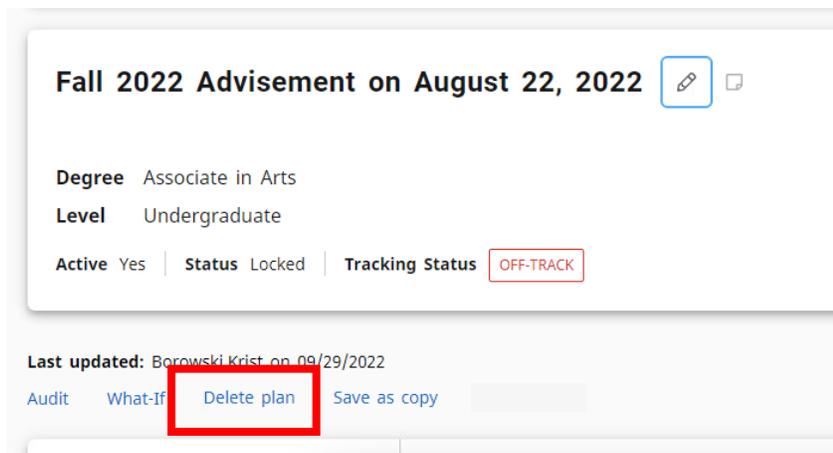


Like the *Audit* feature, a What-If Planner Audit will open in a *new* tab.

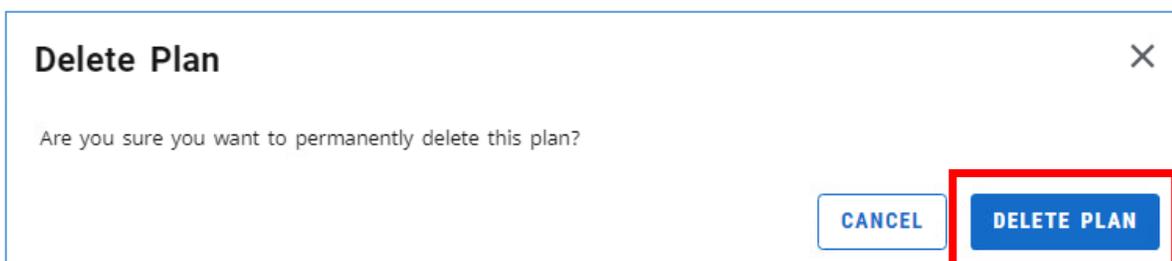
- You should see an increase in the percentage on the Degree Progress area in the header.
- You will see the  symbol next to the planned requirements along with the class and the courses will say *PLAN* in the grade column of the audit.

Delete plan

If you wish to delete a plan you've created, you may do so from the plans page or from within the plan. If you have the plan open, click the *Delete plan* link below the plan header.



You will get a pop-up to confirming you'd like to permanently delete this plan. Click *DELETE PLAN*.



To delete a plan from the *Plan List*, click the trash can in the row of the plan you wish to delete.

Plan List							NEW PLAN
Description	Active	Modified ↓	Who	Degree	Level	Status	
test	No	10/14/2022	Borowski,Krist	AA	U	Not locked	

You will get a pop-up to confirming you'd like to permanently delete this plan. Click *DELETE PLAN*.

NOTE: Be careful when using this screen when deleting plans and **DO NOT** delete a plan created by someone else.

Tracking Features

In the SEP, you can identify courses that are critical to a student's degree completion.

Critical Indicator

When editing a requirement, the "Critical" indicator box should be used to mark which courses are most important for a student to take in each semester. Oftentimes, the courses marked critical will be courses that are prerequisites for future courses and those necessary for a student to graduate in a timely manner.



Edit Requirement [X]

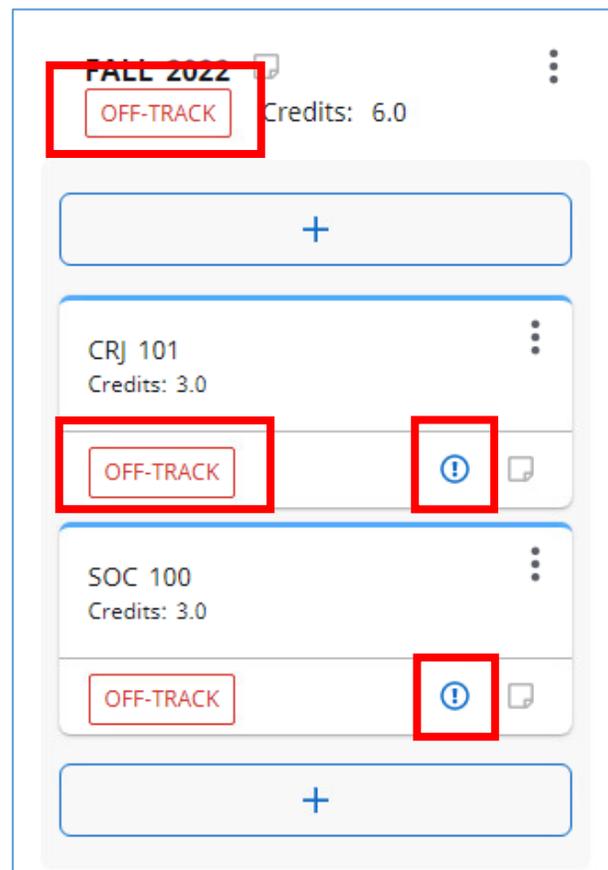
Requirement type
Course

Critical

SOC 100 [Q]

Credits
3.0

There will now be a  symbol on the course and the plan will now display tracking on the term and course level if the plan is active and locked.



FALL 2022 [OFF-TRACK] Credits: 6.0

[+]

CRJ 101
Credits: 3.0

[OFF-TRACK] [i]

SOC 100
Credits: 3.0

[OFF-TRACK] [i]

[+]

On-Track

A course will display as On-Track if it was marked critical and the student has registered for/completed the course.

Off-Track

A course will display as Off-Track if it was marked critical and the student has not registered for/completed the course.

Warning

A warning will display for a course when it is included in a plan, but was not marked critical, and the student has not registered for the course.

Printing/Saving Plans

To print or save a plan as a PDF, click the printer icon   in the top right-hand corner of the *Plans* page. The printable/savable version will open in another tab. Notes created on a plan will NOT display on a PDF or printable version of the plan. Click the printer icon again to print/save as PDF.