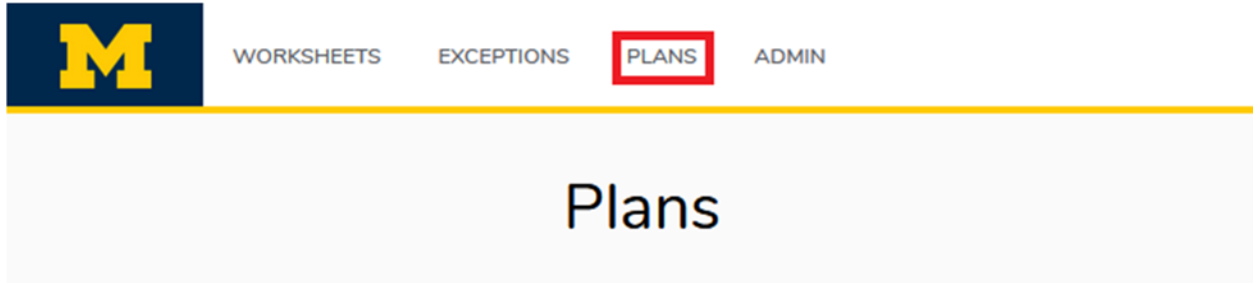


# Getting Started with Plans

Click the "Plans" tab at the top of the worksheet in Degree Works.



Once you've selected "Plans", select "New plan" if the student does not have a plan created.



Once you've clicked this tab, the following pop-up will appear (if the student does not yet have a plan created): Click "Blank Plan" to build a new plan. (Templates are not used)

## Create Plan



Would you like to create a plan based on a template or would you like to start from scratch?

Blank plan

Select template

If the student already has one or more plans, the plan list will pull up. You can edit or review each of those plans by clicking on the plan name.

The screenshot shows a table titled 'Plan List (QA)' with a 'New plan' button in the top right corner. The table has seven columns: Description, Active, Modified, Who, Degree, Level, and Status. There are three rows of data. Below the table is a pagination bar showing 'Page 1 of 1' and 'Total results: 3'.

Description	Active	Modified ↓	Who	Degree	Level	Status	
Test AA	Yes	11/15/2020	Wilson, Giannina F	AB	UG	Locked	🗑️
Test	Yes	11/15/2020	Wilson, Giannina F	AB	UG	Not locked	🗑️
Test	No	10/11/2020	Sanders, Felicia	AB	UG	Not locked	🗑️

Page 1 of 1 Total results: 3

# Steps to Building a Plan

## 1. Select the starting term for the plan

- Select from the drop-down menu then click "Submit".

Select a Starting Term ×

Please select a term to serve as your starting term for this plan

Select term \*

## 2. Name the plan in the "description" box

- Consider using the name of the program or major. This is helpful if a student changes majors because they will be alerted that this is not the plan they should be following now.
- If you are specifically building a graduation plan, it is recommended to name it "Graduation Contract" or "Graduation Plan" for the last few semesters.

Edit Plan ×

Description \*  
Accounting Plan

Active  Locked

## 3. Ensure the student's degree matches the plan degree.

## 4. You have the option to mark the plan active and/or locked

**Active:** Active plans should mean the plan is current. Outdated/old plans should not be marked active.

**Locked:** Students cannot edit the plan. You, or another advisor, are the only ones that can edit locked plans.

**Other Information:** Plans must be marked both active and locked to use the tracking feature (i.e. on-track, off-track, warning). Only one plan per student should be marked both active and locked.

Edit Plan ×

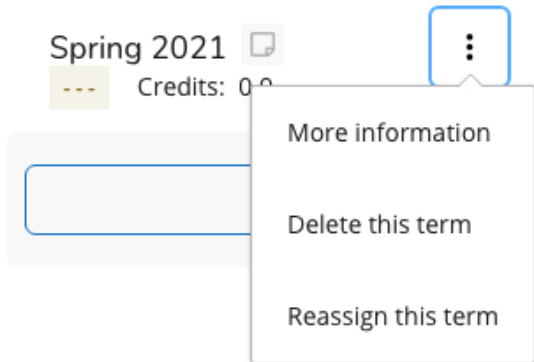
Description \*  
Accounting Plan

Active  Locked

After this upper section is set up, add semesters to the plan. This is done by clicking on the "Add term" button at the far right.

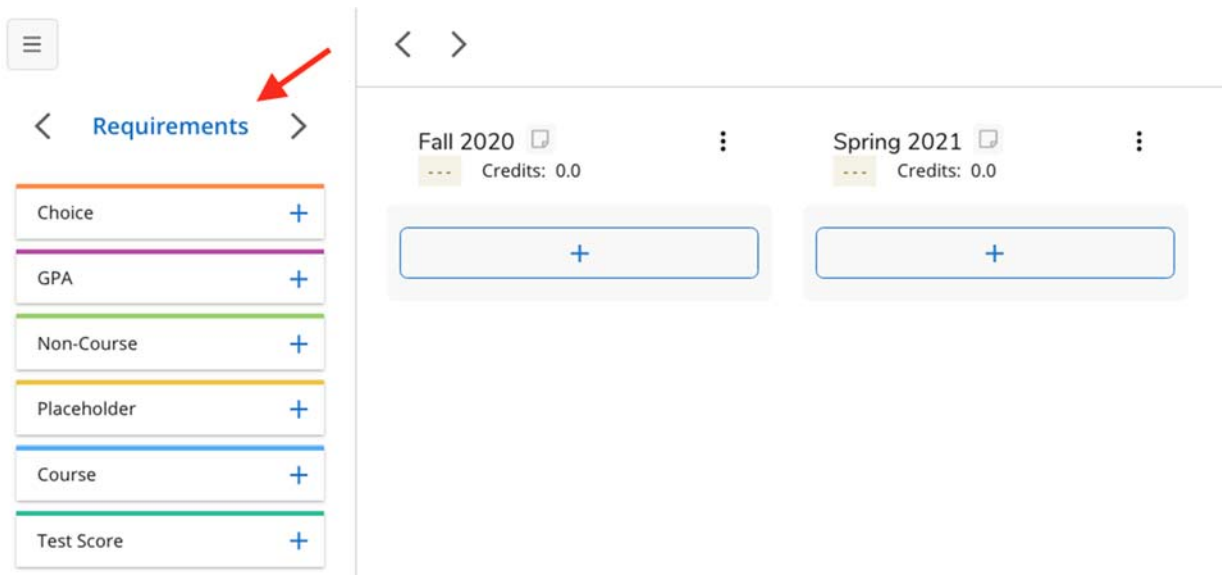


(If you need to delete a semester, click on the three vertical dots (ellipsis) to the right of the semester you want to delete then select "Delete this term".)



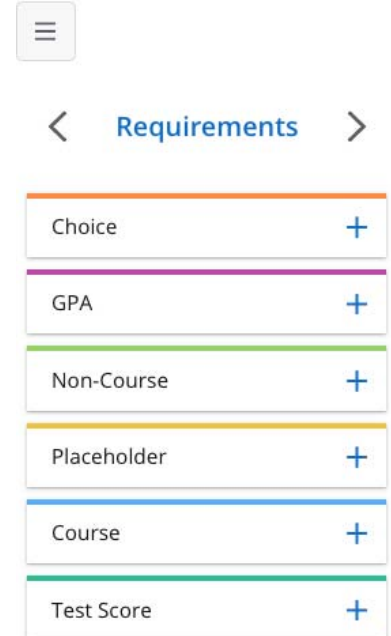
Once you have the semesters entered, requirements can be added.

There are several requirement options to choose from. See the list on the next page for more information on these "Requirements" sidebar options.



# Requirement Options

- **Choice**: Use this when there are several course options that can fulfill a requirement.
  - For example: Student can take PSYC 101 or SOC 200.
- **GPA**: You can plan for three types of minimum GPAs for a term: Class, Major, Overall GPA.
- If you don't want to track the GPA requirements or if one of these GPA options doesn't meet your needs, you could use a GPA "Placeholder requirement" in the "Comment" box in Placeholder instead and add further specifications in the "Value" box.
- **Non-Course**: Plan for non-course items that need to be completed as part of a degree with this requirement.
- Examples include: portfolio, various exams, etc
- **Placeholder**: These requirements are informational only and are not included in tracking.
- Click on the arrow to see all the options. These can be beneficial because you can select "Course Range", "Comment", or other options and can further specify by typing what you want the student to plan for in the "Value" box. Use the "Wildcard" placeholder option if one of the pre-set options does not meet a student's needs.
- **Placeholders do not allow for a credit count.**
- **Course**: A single course can be planned for with this requirement.  
*\*You will use this requirement option the most.*
- A course can be entered manually or from a list of courses by prefix or from a "still needed list".
- **Test Score**: Tests that need to be completed as part of a degree can be planned for with the test requirement.



# Adding a Planned Course

New Requirement

×

Requirement type  
Course

Term \*

Honors

Course requirement ←

Credits

Minimum grade

Delivery

Cancel Save

- After selecting "Course", select the term to add the course to from the drop-down menu.
- Type the course prefix and course number in the "Course requirement" box. Press enter or wait a moment for the course to appear. Select the course.
- Other course specifications: You can also specify a minimum grade that must be received in the course and the delivery method, such as online, hybrid, or on campus.
- Click "Save" to save this course to the semester.

## VARIABLE CREDIT COURSES

At this time, in order to change a variable credit class from the maximum number of credits that are built for the course in Banner, you will need to add the course from the left sidebar (by selecting "Course").

Degree Works will always display the maximum number of credits that are built in Banner for a course, but it can be adjusted when the course is added through the sidebar ("Course").



< Requirements >

Choice +

GPA +

Non-Course +

Placeholder +

Course + ←

Test Score +

Edit Requirement

×

Requirement type  
Course

Honors

LIBS 395

Credits  
3.0 ←

Minimum grade

Delivery

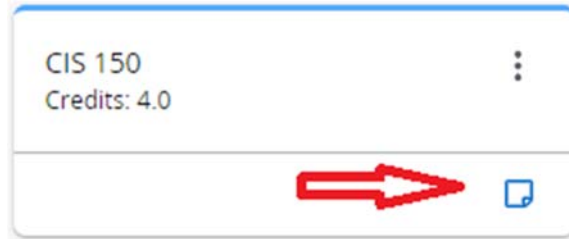
Cancel Save

## MOVING A COURSE TO ANOTHER TERM

If needed, you can drag and drop requirements to different semesters. This is beneficial as changes occur throughout a student's progression toward their degree. If the student did not take a course during the specified semester, simply move it to another semester. The course (or other requirement) may also be reassigned to a different semester via the ellipsis on the top right-hand corner of the class.

## ADDING A NOTE TO A COURSE

To add a note to a requirement, click on the paper icon at the bottom right-hand corner of the class. Once the note is saved, the small note icon will be outlined in blue.



# Adding a Choice

Choice requirements are similar to adding planned courses, but this option allows you to add several choices for a student to choose from in a specific semester.

- After selecting "Choice", select the term to add the choices to from the drop-down menu. Type the course prefix and course number in the "Choice requirement" box. Press enter or wait a moment for the course to appear. Select the course.
- Click on "Add" to the far right. This will allow you to add an additional course choice (or several choices) to the semester.
- Next, add the next course option(s) as you did the first.
- You can also specify the number of credits that should be taken when a student selects one of these courses. A minimum grade may also be added to the choice.
- Click "Save" to save these course choices to the semester.
- "Add a paired course or lab" should only be used when a course must be taken concurrently, such as CHEM 134 and CHEM 134L.
- An item can be an actual course such as MATH 101, a wildcard such as @ @, MATH @, or MATH 3@, or a range such as MATH 100:299.
- You may also search for courses by attribute, but you must know the full name of the attribute.
- Choice options in a plan will always appear below the planned courses and will have an orange bar on the top.
- The choice options do not appear on the "audit" view.
- Be sure to advise the student to select one of the choices and add it to their plan before trying to register from their plan.

The image consists of three screenshots from a mobile application interface, illustrating the process of adding a choice requirement to a semester plan.

- Left Screenshot:** Shows the "Requirements" screen with a list of requirement types: Choice, GPA, Non-Course, Placeholder, Course, and Test Score. A red arrow points to the "Choice" option, which has an orange bar at the top and a plus sign on the right.
- Middle Screenshot:** Shows the "New Requirement" form. The "Requirement type" is set to "Choice" and the "Term" is "Fall 2021". Under "Choice requirement", two courses are listed: "CHEM 134" and "CHEM 144". A red arrow points to the "Add a paired course or lab" link between the two courses. The "Credits" field is set to 4.0 and the "Minimum grade" is set to "A". A red box highlights the "Add" button on the right.
- Right Screenshot:** Shows the "Fall 2021" semester plan with "Credits: 8.0". The plan contains a "CIS 150" course (Credits: 4.0) and a choice requirement "CHEM 134 or CHEM 144" (Credits: 4.0). A red arrow points to the choice requirement, which has an orange bar at the top.

## Edit Requirement



Requirement type  
Choice

Honors

### Choice requirement

[Add](#)

@ @



Attribute



[Add a paired course or lab](#)

MATH 3@



Attribute



[Add a paired course or lab](#)

MATH @



Attribute



[Add a paired course or lab](#)

MATH 100:299



Attribute



Cancel

Save

Wildcard and range examples



@ @ or MATH 3@ or MATH @ or MATH  
100:299  
Credits: 3.0

# Adding a Placeholder

Placeholder requirements are informational only. Many advisors and students find these beneficial because you can select from various options and add information in the "Value" field.

- After selecting "Placeholder", select the term to add it to from the drop-down menu.
- Select from the list of pre-built placeholder options (our example here is "Comment"). If there is not a placeholder that works for your needs, you may select "Wildcard" or "Comment" and add specific information in the "Value" field or contact the Degree Audit Specialist to discuss the possibility of adding an additional Placeholder option.
- Whatever is added in the "Value" field will display to the student in the plan.
- The placeholder does not appear on the "audit" view.
- Click "Save" to save the placeholder to the semester.

The image shows a mobile application interface for adding requirements. On the left, a list of requirement types is shown: Choice, GPA, Non-Course, Placeholder, Course, and Test Score. A red arrow points to the 'Placeholder' option. On the right, a 'New Requirement' dialog box is open. The 'Requirement type' is set to 'Placeholder'. The 'Term' is set to 'Fall 2021'. The 'Placeholder' is set to 'Comment', with a red arrow pointing to this selection. The 'Value' field contains the text 'You need 6 credits of upper level electives.' At the bottom of the dialog are 'Cancel' and 'Save' buttons. Below the dialog, a preview of the requirement is shown: 'Comment' followed by 'You need 6 credits of upper level electives.' and a copy icon.

# Other Options for Adding Courses

Fall 2021   
Credits: 8.0



## OPTION A: Click on the "+" at the top or bottom of a specific term



From there you can add a single course or multiple courses by:

- Typing in the course subject in the "Subjects" box. This will bring up a list of course subjects.
- Select the subject that corresponds to the course prefix (i.e. Marketing=MKT). This will bring up a list of all courses in the selected subject/prefix.
- Click the box beside any/all of the courses you want to add. You can add multiple course subjects to the term before clicking on "Add to plan" at the bottom left. (You can easily uncheck a course or click the "x" beside the course if you change your mind.)
- Courses will be added to the term you are working in and will be displayed in the order they are selected.
- ("Still Needed" is an option on this screen as well, however, at this time ONLY requirements without attributes are available to add through the "Still Needed" option. Courses still needed with attributes do not display here properly. This software defect will be fixed during a future update.)

Add requirements to Fall 2021

Subjects

**Courses** Still needed

Subjects Marketing  Search by title

Marketing (MKT)

<input type="checkbox"/>	Course	Title	Credits
<input checked="" type="checkbox"/>	MKT 352	Mktg Principles and Policies	3.0
<input type="checkbox"/>	MKT 360	Marketing and Society	3.0
<input type="checkbox"/>	MKT 363	Digital Consumer Srch&Mktg	3.0
<input type="checkbox"/>	MKT 382	Understanding Customers	3.0
<input type="checkbox"/>	MKT 402	Marketing Management	3.0
<input type="checkbox"/>	MKT 434	Sales Mgmt & Personal Selling	3.0
<input type="checkbox"/>	MKT 436	Business to Business Mktg	3.0
<input type="checkbox"/>	MKT 454	Marketing Research	3.0
<input type="checkbox"/>	MKT 455	E-tailing and Retailing	3.0
<input type="checkbox"/>	MKT 456	Advg and Sales Promotion	3.0

Page 1 of 3

Total results: 23

# Other Options for Adding Courses

## OPTION B: Click on the right arrow beside "Requirements" in the side-bar to reach "Courses"

- Type the course title (or portion of the title) in the "Course Title" box. This will bring up list of courses that contain that word in the title. (Example="human")
- The drop-down will populate with all known active course prefixes in Banner that contain the word "human" (from our example).
- Click the drop-down arrow to the right of the course prefix to see the course. Click and drag the course to the term the course is to be planned in. (Example=ANTH 331 "Human Evolution.")
- ("Still Needed" is also available by clicking the right arrow beside "Requirements" in the side-bar, however, at this time ONLY requirements without attributes are available to add through the "Still Needed" option. Courses still needed with attributes do not display here properly. This software defect will be fixed during a future update.)



The image consists of three sequential screenshots illustrating the process of adding a course:

- Requirements Sidebar:** A sidebar menu with a blue header "Requirements" and a right-pointing arrow. Below the header are several categories with plus signs: Choice, GPA, Non-Course, Placeholder, Course, and Test Score.
- Courses Search Page:** A page with a blue header "Courses" and a search box containing the text "human". A red arrow points to the search box. Below the search box is a table with columns "Course", "#", and "Title". The first row is "Anthropology (ANTH)" with a red square around its dropdown arrow. Other rows include "Biochemistry (BCHM)", "Biological Science (BIOL)", and "Continuing Industrial Engin (...)".
- Courses Search Results Page:** A page with a blue header "Courses" and a search box containing "human". Below the search box is a table with columns "Course", "#", and "Title". The first row is "Anthropology (ANTH)" with an upward-pointing arrow. Below it are several rows of course results, each with an information icon (i) to its right. The first result is "ANTH 331 Human Evol...", followed by "ANTH 341 Human Pale...", "ANTH 409 Human Body...", "ANTH 435 Human Gen...", "ANTH 459 Human Oste...", and "ANTH 509 Human Body...". A red arrow points to the first result.

# Audit View of the Plan

(This view displays the student audit in a separate browser tab, so if you wish to see the plan side-by-side with the audit, you will need to use two screens.)

The Audit view can help you verify completeness of the plan. If a course has been taken, the course will be listed on the left in the respective block (Dearborn Discovery Core, Major, Minor, etc.). If the course has not been taken but is found in the student plan, the course will have (**PLAN**) on the worksheet. Courses currently in progress will have (**INPR**) on the worksheet. A (**T**) denotes that it was applied by transfer articulation. If the course is listed as "**Still needed**" then it has not been taken or added to the student plan.

Test two year plan   Plan list New plan

Degree Bachelor of Arts  
Level Undergraduate

Active Yes | Status Not locked | Tracking Status NOT DISPLAYED, PLAN IS NOT LOCKED

Last updated: Wilson, Giannina F on 4/8/2020

**Audit** What-if Delete plan Save as copy

## Dearborn Discovery Core

INCOMPLETE

Credits applied: 29 Catalog year: 2019-2020

Course	Title	Grade	Credits	Term	Repeated
COMP 105	Writing & Rhetoric I	A	3	Fall 2019	
COMP 106	Writing & Rhetoric II	A+	3	Winter 2020	
<b>Still needed:</b>	Course still needed and not planned.	3 Credits in @ @ with attribute = GEWI			
MATH 115	Calculus I	A+	3	Fall 2019	
CHE 101	Intro to Health Education	<b>PLAN</b>	(3)	Winter 2021	
ASTR 130 and 131 when taken together will satisfy a lab science requirement.					
CHEM 136	General Chemistry IIA	A+	4	Winter 2020	
CHEM 134	General Chemistry IA	A+	4	Fall 2019	
HIST 111	The American Past I	<b>T</b>	3	Fall 2019	
Satisfied by: AHISS - United States History - Advanced Placement Credit					
POL 201	Politics Around the World	A	3	Fall 2019	
PSYC 101	Introduction to Psychology	PLAN	(3)	Winter 2021	
Still needed:	6 Credits in @ @ with attribute = GEHA				
Still needed:	6 Credits in @ @ with attribute = GEIN				
Still needed:	3 Credits in @ @ with attribute = GECE				

# Adding a GPA

Three types of minimum GPAs for a term can be planned for with the GPA requirement – Class List GPA, Major GPA, and Overall GPA- Student System. These can be used as criteria in tracking.

< Requirements > New Requirement ×

Choice +

Course +

GPA +

Non-Course +

Placeholder +

Test Score +

Requirement type  
GPA

Term \*  
Winter 2021

Class List GPA

Major GPA

Overall GPA - Student System

Cancel Save

- **Class List GPA** - A group of classes in which the student needs to have earned a minimum GPA can be defined. Each class should be separated by a plus sign, and ranges and wildcards can be included in the list. Classes are validated, but ranges and wildcards are not. Additional information may be added by clicking on the “notes” icon.

Edit Requirement ×

Requirement type  
GPA

GPA type \*  
Class List GPA

Minimum GPA \*  
3.000

Class list \*  
BIOL 140 +CHEM 134

Winter 2021 Credits: 0.0

3.000 Class List GPA  
Courses: BIOL 140 +CHEM 134

Cancel Save

- **Major GPA** – A minimum gpa required for the major to be earned for the semester can be defined. Select the major from the drop down menu in the “major” box. Enter the GPA needed in the “minimum GPA” box. Additional information may be added by clicking on the “notes” icon.

Edit Requirement ×

Requirement type  
GPA

GPA type \*  
Major GPA

Major \*  
Elementary Certification

Minimum GPA \*  
2.750

Winter 2021 Credits: 0.0

2.750 Major GPA  
Major: Elementary Certification

Cancel Save

- **Overall GPA- Student System** – A minimum overall gpa that is required to be earned for the semester can be defined. Additional information may be added by clicking on the “notes” icon.

Edit Requirement

×

Requirement type  
GPA

GPA type \*  
Overall GPA - Student System

Minimum GPA \*  
2.000

Cancel Save

Winter 2021 ☐  
Credits: 0.0

⋮

+

2.000 Overall GPA - Student System ⋮

☐

# Adding a Non-Course

Non-Course items that need to be completed as part of a degree can be planned for with the Non-Course Requirement. These can also be used as criteria in tracking. Click on the drop down menu to select a non-course item such as “foreign language placement exam”, “math placement exam”, “phase III education”, etc. The **Status** can be left blank to indicate that the student just needs to have completed the non-course item. It can also be the alphanumeric score or status “needed” to consider the requirement complete.

< Requirements > New Requirement X

Choice +	Requirement type Non-course requirement
Course +	Term * Winter 2021
GPA +	Noncourse *
Non-Course +	Status
Placeholder +	
Test Score +	

Cancel Save

- Arabic Placement Exam
- Basic Skills - Math
- Basic Skills - Reading
- Basic Skills - Writing
- CASL Portfolio
- CPR Adult/Child and First Aid
- Composition Placement Exam Raw
- Composition Placement Score
- Composition Placement Score
- Criminal Background Check
- English Placement Exam
- English Placement Exam
- Foreign Language Placement
- French Placement Exam
- German Placement Exam
- Institution Hours
- MTTC Biology

# Adding a Test Score

Tests that need to be completed as part of a degree can be planned for with the Test Requirement. These can also be used as criteria in tracking. Click on the drop down in the “test code” box to select a test. A **Minimum Score** is required.

**Requirements**

- Choice +
- Course +
- GPA +
- Non-Course +
- Placeholder +
- Test Score +

**New Requirement**

Requirement type  
Test Score

Term \*  
Winter 2021

Test code \*

Minimum score \*

Cancel Save

**New Requirement**

Requirement type  
Test Score

Term \*  
Winter 2021

Composition Placement Score

Mathematics Placement

Mathematics Placement

Cancel Save

Winter 2021

Credits: 0.0

+

115 on Mathematics Placement

# Prerequisite Error Validation Message

If a student is missing one or more of the prerequisites for a course, a “validation error” message will display in the pop up window. It is strongly recommended that it should **NOT** be added to the plan. Please refer to your College policy regarding overriding prerequisites to add to the student plan.

## Validation Error



Your plan is missing some pre- or co-requisites for one or more classes.

- MATH 104 [min D-] or 105 [min D-] or 113 [min D-] or 115 [min D-] or equivalent Mathematics Placement must be completed before taking ACC 298. MATH 104, 105, 113, or 115 may be taken concurrently.

Would you like to save without resolving the error(s)?

Cancel

Yes

# Creating and Editing Notes

An unlimited number of notes can be added to courses, semesters or to the overall plan. All notes are viewable to all users.

Place your cursor over the note icon. Click on the note icon to open the note list window, where you can choose to view, add, edit, or delete notes.

To add a note, click on **Add a new note** to open the note edit window. Notes can have an unlimited amount of text, and may contain text formatting such as face types, indentation, and bullet lists. Click **Save Note** to keep your note, or **Cancel** to go back to the note list window without keeping your note. To view or delete a note, click on the blue note icon and click on the three dots to the right, select **View Note** or **Delete**. If one or more notes have been added to a course, semester, or to the overall plan, the note icon will change from grey to blue.

test   Note at Plan level

Degree Pre-Degree Track  
Level Undergraduate

Active Yes | Status Not locked | Tracking Status NOT DISPLAYED, PLAN IS NOT LOCKED


Plan list New plan


Last updated: Wilson, Giannina F on 12/21/2020


Audit Delete plan Save as copy

Requirements

- Choice +
- Course +
- GPA +
- Non-Course +
- Placeholder +
- Test Score +

Winter 2021  Note at semester level  
Credits: 3.0

COMP 105  Note at class level  
Credits: 3.0

Winter 2021  The note icon will be blue when a note has been added.  
Credits: 3.0

Term Notes

Created on 12/21/2020  
By Wilson, Giannina F  
Here is a note at the semester level.

View note  
Delete note

Add a new note