HOW TO CREATE A NEW PLAN

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REVISION HISTORY

Version	Date	Name	Description
1	2.16.16	Bracken	final
2	2.16.24	Emily	5.1.2 Degree Works Upgrade

INTRODUCTION AND PURPOSE

Course plans are available to provide students' guidance towards completion of their degree requirements in a term-based structure. This procedure document is intended to introduce users to Student Course Plans and show users how to assign a new plan from an already created template and/or how to create a new plan for a student from scratch.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. The Registrar's Office will maintain a template for each undergraduate major. Departments should contact the Registrar's Office regarding questions or changes to the templates.
2. The Graduate Division Academic Affairs office is not creating or maintaining templates for graduate students. Departments can create and maintain their own templates, if needed.
3. Templates will be assigned to first-year students prior to Orientation.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Registrar's Office
2. Graduate Division Academic Affairs Office
3. College Offices
4. Academic Departments

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Degree Works (https://degreeworkstest.ucr.edu//) to follow along.

FORMS

The degree audit is in Degree Works. There are no forms in Degree Works.

PROCEDURES

PREPARATION

Plans can be created in one of two ways: it can be based on a template for specific terms or created from scratch by starting with a blank plan.

ASSIGNING A PLAN BASED ON A TEMPLATE

Only Fall quarter options are available for templates. Note: currently all templates created have a Term Scheme of Fall start. A Term Scheme determines the basis for a template and what its starting term will be.

If a student is not starting as a first-year student in the fall quarter or changes major into a new program after the first quarter, term modifications may be required. Please see *How to Modify an Assigned Course Plan* for more information on reassigning or adding/deleting a term.

STEPS

1. First **search** for and **select** a student in the Degree Works interface. Be mindful of the student you choose to create a plan for during this training, as you will be asked to use this same student in the following Degree Works Course Plan Procedures.

2. Select the **Plans** tab.

3. Select **New Plan**

4. Click on **Select Template** to view the list of available templates.
   a. Templates are created by the Registrar's Office in collaboration with the department. A template becomes a "plan" once it has been assigned to a student.

5. A list of all active templates will be shown.
6. Select the underline starting term for the plan. Choose a start term that represents when the student started at UCR.

7. Select the template from the list of all active templates by clicking the plan's description title.
    a. **Tip**: Search for a template by Description. Enter a word or partial string that appears in the template's description to load options.
    b. NOTE: Ensure to select the Template for the correct Catalog Year.
        - **Tip**: Sort the template's columns in ascending and descending order by selecting the column title.

8. The plan will save the student's record and load automatically. The plan will display the according to the starting term selected, and with the requirements for each term.

9. Please see policies and procedures on *How to Modify an Assigned Course Plan* to make modifications and/or make this new plan active/locked.

ASSIGNING A PLAN FROM SCRATCH

STEPS

1. Select **New Plan**.

Plan List   NEW PLAN

2. To create a new plan from scratch, select **Blank Plan**.

Create Plan   ✕

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

SELECT TEMPLATE   BLANK PLAN

3. Select the plan's starting term from the dropdown and click SUBMIT.

Select a Starting Term   ✕

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

Select term *   ⌄

CANCEL   SUBMIT

4. Name the student's new Plan under **Description**.
    a. The advisor creating a plan should follow the same naming convention as the templates. The name of the plan should be the major's name. For example, "Asian American Studies" and can have a modifier following it.
    b. A description is required and can be up to 80 characters long with spaces.
5. If you do not want this plan to be the primary plan do not click active and/or locked. Save.

Edit Plan ✕

Description *

☐ Active   ☐ Locked

CANCEL   SAVE

6. **Requirements** on a blank plan must be entered term by term.
    a. To **add** a term, click on the ADD TERM icon, located on the top right-hand of the plan.
    b. To **delete** a term, click on the three-dot menu of the term you want to modify and select Delete this term.

Fall 2015
Units: 8

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More information

Delete this term

Reassign this term

ENGL 001A
Units: 4.0
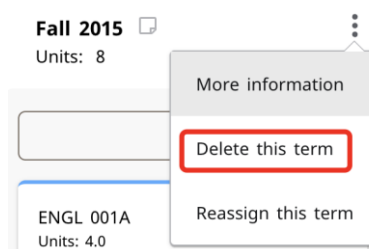
    a. Add Plan Requirements to the plan.
        i. Select the (+) icon on the Requirement type.

‹   **Requirements**   ›

Choice	+
Course	+
Non-Course	+
Placeholder	+

7. *For further instructions on adding/deleting/editing requirements please see policies and procedures on* How to Modify an Assigned Course Plan.
8. Changes to the plan will automatically save.

FINAL QUIZ

1. Plans can be created in one of two ways: it can be based on a template for specific terms or created from scratch by starting with a blank plan.
    a. TRUE
2. A template becomes a "plan" once it has been assigned to a student.
    a. TRUE
3. If you want the plan to show on the student's self-service, you just need to lock it.
    a. FALSE, a plan must be active and locked to show in self-service