

# HOW TO MODIFY AN ASSIGNED COURSE PLAN

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## REVISION HISTORY

Version	Date	Name	Description
1	2.16.16	Bracken	final
2	2.15.24	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. This training will show users how to navigate and modify a student's already assigned Course Plan in Degree Works.

## 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.
4. A student may modify and save an "active" plan.
5. A student may not modify and save a plan that has been "locked." They may modify and save a copy of a plan that has been "locked."
6. Notes on plans should not be deleted unless they are true errors. This provides a record of information shared to the student and is part of the student record.

## 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

1. To access the plans for a student, first search for and select the student in the Degree Works interface.

2. Click on the Plans tab to load the student's plan list:

3. **Select the description of the plan** from the Plan List you would like to modify.
  - a. A primary plan should be used by advisor and student to meet the student's academic goal.
  - b. **A student's primary plan should be "active" and "locked."**

## CHECK YOUR UNDERSTANDING

1. A student's active plan will automatically open when clicking the Plans tab.
  - a. FALSE
2. A student's primary plan should be active and locked.
  - a. TRUE

## HOW TO MODIFY THE PLAN

A Student Plan can be edited term by term. Past, current, and future terms can be edited. You have the option to edit a requirement that is already on the student's plan, or you can delete that planned requirement and add a new one. An unlimited number of requirements can be added to any term.

## HOW TO MODIFY THE HEADER

4. Select the **pencil icon** from the plan header to modify the description of the plan and set the plan to Active or Locked.
  - a. Only Advisors can lock a plan.

**Sociology Administrative Studies B.A.**  

**Degree:** Bachelor of Arts

**Level:** Undergraduate

**Total Planned Units:** 55.0

**Active:** Yes **Status:** Locked

**Edit Plan** ×

Description \*  
Sociology Administrative Studies B.A.

☒ Active ☒ Locked

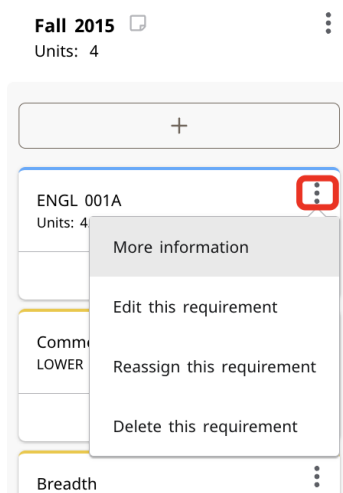
CANCEL SAVE

5. Make the plan active and locked by clicking the check boxes and saving.
  - a. Only active and locked plans from Degree Works show in Banner self-service.
  - b. **Active flag** indicates the Plan is current and in use.
    - i. There can only be ONE active plan.
    - ii. A student may modify and save a plan that is “active”
  - c. **Locked flag** prevents the student from making changes to the Plan
    - i. A student may not modify and save a plan that has been “locked,” but they can modify it and then save a copy.

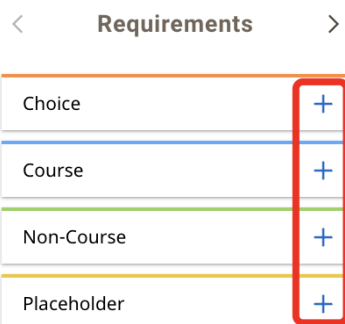
## HOW TO MODIFY THE REQUIREMENTS

Modifications such as adding or deleting course requirements, marking a requirement as critical, or inserting a minimum grade requirement can be made directly to the term.

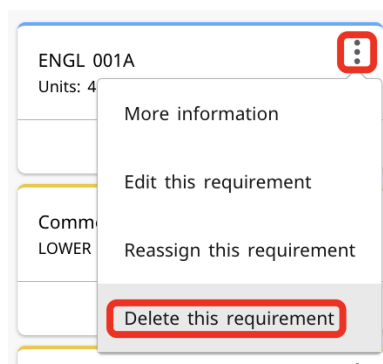
1. To **edit** a planned requirement, click on the three-dot menu of the field you want to modify and select Edit this requirement
  - a. Note: The existing requirement type cannot be modified. The existing requirement will need to be deleted and the new one added.



2. To **add** a requirement, click the + icon on the desired card in the Requirements list of the sidebar or drag and drop the requirement card to the desired term. There are four requirement types: Course, Choice, Non-course, and Placeholder. The four requirement types will be defined later in this document.
  - a. When adding a requirement, a dialog will open where the details of the requirement can be added.
    1. If the requirement card was dragged and dropped into a term, that term will load automatically.
    2. If added from the sidebar, the user can select the term to which the requirement should be added.



3. To **delete** a Requirement, click on the three-dot menu of the field you want to modify and select Delete this requirement.

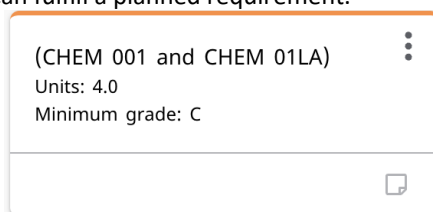


4. To **move** a requirement to another term, click on the three-dot menu of the field you want to modify and select Reassign this requirement or drag and drop it to the desired term.

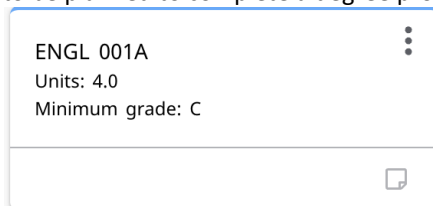
## TYPE OF REQUIREMENTS

There are four types of requirements that can be added to a student's plan towards completion.

1. **Choice:** Several course options that can fulfill a planned requirement.



2. **Course:** Individual courses that need to be planned to complete a degree program.



3. **Non-Course:** Non-course items that need to be completed as part of a degree.
- 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.

A requirement card with a green border. The text "Basic Skills: Completed" is displayed. To the right of the text is a three-dot menu icon. At the bottom right is a small icon of a document with a plus sign.

4. **Placeholder:** User-defined requirements that need to be completed as part of a degree.
- Placeholder requirements are intended to be informational only and are not included in tracking nor do they apply to planner audit rules.

 A requirement card with a yellow border. The text "Breadth" and "ANTH/PSYC" is displayed. To the right of the text is a three-dot menu icon. At the bottom right is a small icon of a document with a plus sign.

## ADDING A CHOICE REQUIREMENT

Choice Requirement is used when there are several course options that can fulfill a planned requirement.

### STEPS

- Add a Choice Requirement using the Requirement Card:
  - Click the **+** icon on the desired card in the Requirements list of the sidebar or drag and drop the requirement card to the desired term.
  - A dialog will open where the details of the requirement can be added.
    - If the requirement card was dragged and dropped into a term, that term will load automatically.
    - If added from the sidebar, the user can select the term to which the requirement should be added.
  - Add a choice requirement for all courses that fulfil the requirement by selecting Add Choice. An unlimited number of options can be defined.

**Choice requirement**

[Add Choice](#)

- If the course has co-requisites or associated lab where the course number is different, select the Add a paired course or lab to link both courses together.
  - For example, CHEM 001A and CHEM 01LA.

 A dialog box titled "Choice requirement" with a blue "Add Choice" button in the top right. It contains a radio button, a search bar labeled "Course \*" with a magnifying glass icon and a trash icon, and a red-outlined button labeled "Add a paired course or lab".

- Add the planned requirement by searching for the course's Subject and Course Number.
  - An option can be any combination of actual courses, wildcards, or ranges.
    - For example, STAT 101 OR MATH1@, Math 100:199.

 A search dialog box with a radio button, a search bar labeled "Course \*" with a magnifying glass icon and a trash icon. The search bar contains "CHEM 001A" which is highlighted with a red box, followed by "GENERAL CHEMISTRY". Below the search bar is a grey button labeled "CHEM 001A GENERAL CHEMISTRY".

○ Course \*  
CHEM 001A

and

Course \*  
CHEM 01LA

- f. Once you have successfully entered the courses in the Choice Requirement, the **Minimum Units** must be entered/adjusted manually.

## ADDING A COURSE REQUIREMENT

There are two ways to add a course to a course requirement. Add a Course Requirement from the sidebar or choose the course from the Still Needed list. Course Requirement is used for individual courses that need to be planned to complete a degree program. The Still Needed List is a mini planner audit that shows only the requirements that are still needed to complete the plan's associated program.

- NOTE: You can create/assign any plan with any major/degree to the student's planner. However, the Still Needed list always displays requirements left based on what the student's **current** declared degree/major goal is, not based on the Plan's chosen degree/major.

## STEPS

1. Add a Course Requirement using the Requirement Card:
  - a. Click the **+** icon on the desired card in the Requirements list of the sidebar or drag and drop the requirement card to the desired term.
  - a. A dialog will open where the details of the requirement can be added.
    1. If the requirement card was dragged and dropped into a term, that term will load automatically.
    2. If added from the sidebar, the user can select the term to which the requirement should be added.
  - b. Add the desired course by searching for the course's Subject and Course Number
    1. The units will automatically load from the course record. If the course is a variable credit course, then the maximum units for that course are displayed. The number of units can be adjusted to a value within the range for that course.
    2. A minimum grade can be added to the course by selecting a minimum grade.



## New Requirement



Requirement type  
Course

Term \*  
Fall 2015

☐ Critical

Course requirement \*  
ECON 153

Units  
4.0

Minimum grade

CANCEL SAVE



- b. If the course is not valid an error message will appear.

Course requirement \*  
ECO 153

No results found. Try again.

Units

2. Add a Choice Requirement using Still Needed:

- a. Click the  icon above the desired term
  - i. A dialog will open where a list of courses that fulfil the requirement can be added.
  - ii. Select the checkbox for the desired course and select Add to plan.
    1. One or more requirements can be selected while in the requirement drawer.
- b. Click the right arrow  on the sidebar to drag and drop the course to the desired term. A confirmation notice will appear on the top right indicating the course was added.
  - i. To view additional course information such as the course description, meeting times, and prerequisites click on the information icon next to the course.

The screenshot illustrates the process of adding a choice requirement. On the left, the 'Requirements' drawer is open, showing various requirement types. In the center, the 'Still Needed' dialog displays a list of courses, with 'ECON 153 LABOR ECO...' selected. On the right, the 'Fall 2015' term is shown, and the selected course is added to the list of requirements for that term.

3. The units will automatically load from the course record. If the course is a variable credit course, then the maximum units for that course are displayed.
  - a. To modify the units and minimum grade for the course select Edit this requirement from the requirement's three-dot menu.


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## ADDING A NON-COURSE REQUIREMENT

Non-Course Requirement is used to add requirements to the Planner that are not courses but satisfy a program requirement. For Example, Language Requirement, Piano (keyboard) Proficiency, Research Project, Thesis etc.

### STEPS

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1. Add a Non-Course Requirement using the Requirement Card:
  - a. Click the  icon on the desired card in the Requirements list of the sidebar or drag and drop the requirement card to the desired term.
  - b. A dialog will open where the details of the requirement can be added.
    - i. If the requirement card was dragged and dropped into a term, that term will load automatically.
    - ii. If added from the sidebar, the user can select the term to which the requirement should be added.
  - c. Select a non-course item from the drop-down list
    - i. Only items from the drop-down can be selected.
  - d. Optional: Add a Status to the Non-course
    - i. 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.

**New Requirement**
✕

Requirement type  
Non-course

Term \*  
Fall 2015

☐ Critical

Noncourse \*  
Basic Skills

Status  
Completed

CANCEL

SAVE


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## ADDING A PLACEHOLDER REQUIREMENT

The Placeholder requirement is a **user-defined** requirement that needs to be completed as part of the degree, but a single course has not been identified.

### STEPS


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1. Add a Non-Course Requirement using the Requirement Card:
  - a. Click the  icon on the desired card in the Requirements list of the sidebar or drag and drop the requirement card to the desired term.
  - b. A dialog will open where the details of the requirement can be added.

- i. If the requirement card was dragged and dropped into a term, that term will load automatically.
  - ii. If added from the sidebar, the user can select the term to which the requirement should be added.
2. Select a Placeholder from the drop-down list.

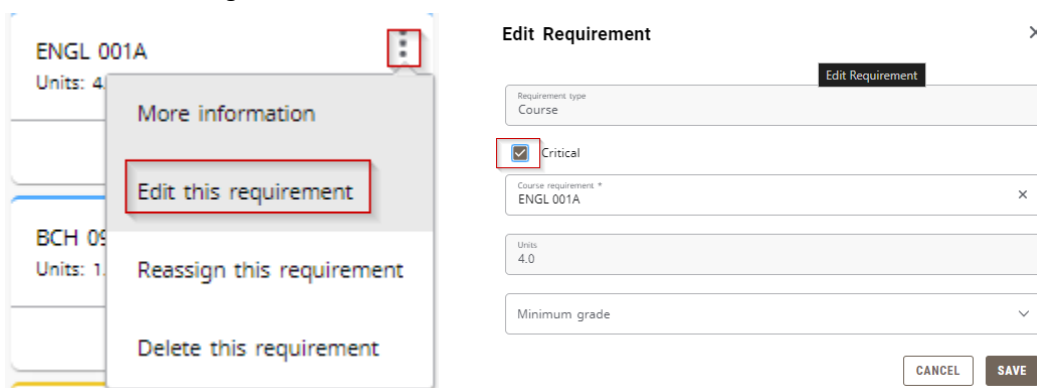
3. Add Requirement Details
  - a. Any alphanumeric value can be added to further explain the Placeholder.
  - b. The Value should be helpful to the student in understanding a requirement.
    - i. Examples:

## CRITICAL REQUIREMENT

If a requirement has been marked as “critical” an  icon will appear next to the requirement. The critical indicator is used to identify critical requirements for completing the major in a particular term for an on-time graduation. The critical indicator box can be placed on all requirements, except Placeholders. All users, except student users, have access to check and uncheck this critical indicator box.

### STEPS - ADD/REMOVE A CRITICAL INDICATOR

1. To **modify the critical indicator** on a requirement, click on the three-dot menu of the requirement and select Edit this requirement.
2. Check the Critical box to **add** the critical indicator. Uncheck the Critical box to **remove** the critical indicator.
3. Click Save to finalize the change.



The image shows a user interface for editing a requirement. On the left, a list of requirements is visible, with 'ENGL 001A' and 'BCH 09' shown. A three-dot menu is clicked on 'ENGL 001A', opening a dropdown with options: 'More information', 'Edit this requirement' (highlighted with a red box), 'Reassign this requirement', and 'Delete this requirement'. On the right, the 'Edit Requirement' dialog box is open. It contains the following fields: 'Requirement type' set to 'Course', 'Critical' checked with a red box around the checkbox, 'Course requirement' set to 'ENGL 001A', 'Units' set to '4.0', and 'Minimum grade' with a dropdown arrow. At the bottom right are 'CANCEL' and 'SAVE' buttons. A red box highlights the 'Edit Requirement' button at the top right of the dialog.

### CHECK YOUR UNDERSTANDING

1. A student can make changes to an active and unlocked plan.
  - a. TRUE
2. A student cannot make changes to a locked plan but can use the "Save A Copy" function to save a copy and make changes to a copy of the plan.
  - a. TRUE
3. Requirements cannot be dragged and dropped between terms in Edit view.
  - a. FALSE, requirements can be dragged to a different term.
4. When adding a Choice Requirement for any upper-division (100 level) Math course you can list it as "MATH @".
  - a. FALSE, the requirement for any 100-level Math course is MATH 1@.
5. An example of a Placeholder requirement would be a breadth class.
  - a. TRUE
6. An example of a non-course requirement is a proficiency exam.
  - a. TRUE
7. If the term scheme of the plan does not include a summer term, you cannot add it to a student's plan.
  - a. FALSE, a term can be added a plan

### ADDING, DELETING, AND REASSIGNING A TERM TO A PLAN

#### STEPS - ADDING

1. If the student's plan only consists of a traditional three quarter per year term scheme, you can add a summer term.
2. To add a term, click on the ADD TERM icon located at the top of the plan's requirements.



3. A dialog box will open where a drop-down list of terms appears. Select the term you want to add and click ADD.

**Add Term**

Please select a term to add to this plan.







Select term \*  
Summer 2015



CANCEL

ADD



- The term selected is now displayed and added to the plan in the order of academic year.

<b>Summer 2015</b>   Units: 0	<b>Fall 2015</b>   Units: 8
	

th

**STEPS– DELETING**

- To **delete** a Term, click on the three-dot menu of the term you want to modify and select Delete this term.
- A confirmation box will appear, click DELETE TERM to finalize the changes.
- A confirmation notice will appear on the top right indicating the term was deleted.

**Fall 2015**    
Units: 8

More information

**Delete this term**

Reassign this term

ENGL 001A  
Units: 4.0

**STEPS– REASSIGNING**

- To **move all the requirements from one term to another term**, click on the three-dot menu of the field you want to modify and select Reassign this term.
- A dialog box will open where a drop-down list of terms appears. Select the term you want the requirements reassigned. Click REASSIGN TERM to finalize the changes.
  - Note: Once the original term has been reassigned, the term will be deleted automatically from the plan as there are no requirements. The term will need to be added back to the plan before requirements can be added.

**Reassign Term**

Reassign to which term?



Select term \*  
Summer 2015



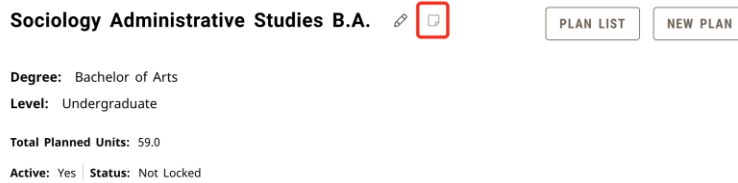
CANCEL

REASSIGN

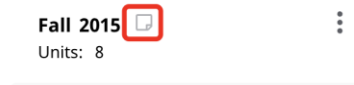
**NOTES**

Notes can be added and modified to the plan overall, to the term blocks, and individual requirements. A white note icon  indicates the note is empty. A blue note icon  indicates there is an active note.

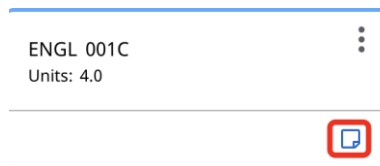
1. **Overall plan notes** can be found on the Plan's header.



2. **Term block notes** can be found on the term header.

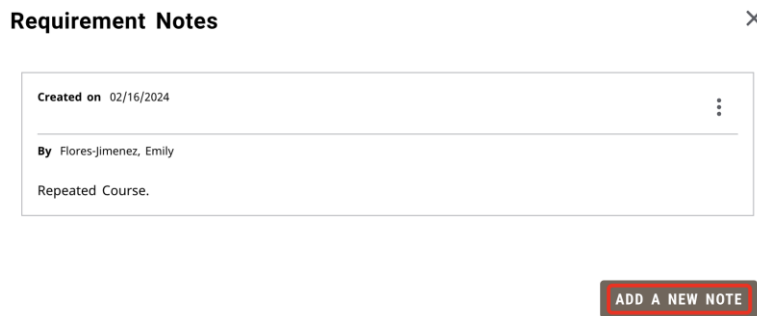


3. Individual requirement notes can be found within the requirement.



## STEPS—ADDING A NOTE

1. To **add** a note, select the note icon where you wish to add a note. Then click on **Add a New Note**.



2. Notes can have an unlimited amount of text. Text formatting is not an option.
3. To make the note internal, select the **Not available to the student** check box.
  - a. All advisors will have access to view and add internal notes. Student users will not have access to view or add internal notes.
4. Once you have entered a note, click **Save Note**.

## Add a new note




Add description

☐ Not available to student

CANCEL

SAVE NOTE

## STEPS—EDITING A NOTE

1. To **edit** a note, select the blue note icon .
2. The note icon will open the selected section's note list window. Click on the three-dot menu of the note want to modify and select Edit note
  - a. You will be able to see all notes that have been added by other users but will only be able to modify your own notes.

## Requirement Notes



Created on 02/16/2024

By Flores-Jimenez, Emily

Repeated Course.

View note

**Edit note**

Delete note

ADD A NEW NOTE

5. Make your edits to the note and click **SAVE NOTE**.

## Edit note



Created on 02/16/2024

By Flores-Jimenez, Emily Status Internal

Add description

Repeated Course - 3rd Taking

☒ Not available to student

CANCEL

SAVE NOTE

## STEPS—DELETING A NOTE

Notes should not be deleted unless it is a true error. Maintaining the history is important and this plan is part of the student record. You may only delete your own notes. You may **not** delete notes entered by other users.

1. To **edit** a note, select the blue note icon .

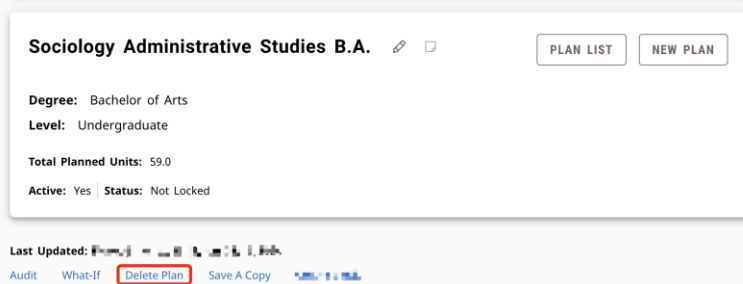
- The note icon will open the selected section's note list window. Click on the three-dot menu of the note you want to delete and select Delete note.
- A confirmation box will appear, click DELETE NOTE to finalize the changes.

## DELETING A PLAN

All advisors will have access to delete a plan even if it is active and/or locked. Student users can only delete a plan if it is **not** locked.

### STEPS—DELETING A NOTE

- To **Delete** a plan, select Delete Plan button located below the Plan Header
- A confirmation box will appear, click DELETE NOTE to finalize the changes.
- A confirmation notice will appear on the top right indicating the plan was deleted. You will be navigated back to the plan list.



## FINAL QUIZ

- When adding a Choice Requirement where the choice has 2 courses that must both be taken, select Add a paired course or lab to add the 2<sup>nd</sup> course.
  - TRUE
- When adding a Choice Requirement where the student has a choice of several classes, use the Add Choice button to add each of the options.
  - TRUE
- If you click the reassign button to move a term from fall to winter, the requirements will not display after clicking Reassign Term.
  - FALSE, the requirements will move to the new term chosen.
- There are 3 levels where notes can be added to the Plans: at the Plan level, at the Term level, and at the Course level.
  - TRUE
- The note icon will be white if there is a note saved on a plan.
  - FALSE, the note icon will be blue if there is a note saved on a plan.