

TERM PLAN REVIEW AND APPROVAL

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REVISION HISTORY

Version	Date	Name	Description
	8/27/2018	Wendy Yu	Banner 9 verbiage update

INTRODUCTION AND PURPOSE

The purpose of this document is to explain how Colleges and Departments can use the Term Plan functionality in self-service to approve student plans prior to registration.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Students can create or edit registration plans by selecting **Term Plan** in Self-Service. Students have the flexibility to create 3 educational plans for any given term. Term Plan allows a student to organize their proposed course schedule. Once the maximum number of plans has been reached no additional plans can be created, however, existing plans can be deleted and/or edited.
2. Advisor or faculty advisors may also create plans for the student. These plans will also display in Term Plan. The maximum number of plans applies to all users creating plans. Plans created by a user who is not the login user can be viewed but not modified; i.e. only a student can edit a student created plan.
3. Term Plan does not check for course restrictions when plans are being created. Course restrictions include but are not limited to meeting the prerequisite, co requisites, major restrictions, etc. Self Service will check restrictions in the Register for Classes path when students are attempting to enroll in their course in registration summary.
4. Notes can be applied to a plan, a course, or section level in the plan summary. Notes can only be edited by the plan creator. Otherwise, they can be seen by any user who can view the plans.
5. Students have the option to only designate one plan as the preferred plan at any time. When a student creates one plan for a term, that plan is automatically identified as the preferred plan by default. The preferred plan is displayed at the top of the list of registration plans. The use of preferred plans is optional. Students cannot make a plan preferred when that plan was created for them by an Advisor. Advisors cannot make a student created plan a preferred plan. A degree audit plan cannot be designated as preferred. When three or more plans exist, and the preferred plan is deleted the user receives a message that another plan should be selected to be the preferred plan. If the student creates two plans and deletes the preferred plan, the remaining plan automatically becomes the preferred plan.
6. We recommend students create Term Plans when the Schedule of Classes is available with sections being offered for the upcoming quarter as not all courses are offered every quarter and because it allows students to upload their plan to the Registration Panel when their registration period arrives which can conveniently enroll them into their courses assuming space is available.
7. The use of self-service plans and its requirements will be determined by the academic units.
8. Academic units that select to use the term plan functionality will utilize a report delivered to iReport to manage student plans for approval. This report will be updated 3 x per day.
9. Even if the academic unit does not require submission of a term plan for approval, a student can use the functionality for their own registration preparation.
10. All communication to the student related to their term plan should be completed through your traditional email channels (i.e. Outlook).

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. College and Departments

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedures, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

PAGES

There are no pages in this training.

PROCEDURES

REVIEWING AND APPROVING A TERM PLAN

Advisors may manage term plans for approval through reports in iReport if creating a Term Plan is mandatory for their students. The report will be procedured two times a day so advisors can have updated information to work on during the afternoon hours. Students do not have an option to tell an advisor that a plan is ready for review; therefore, the student will be on the report for review when the student has listed at least 12 units in the plan.

Note: We recommend that students add sections to their plans instead of courses because the course may not be offered for the specific term. Students can, however, add courses if they don't want to decide on a day and time yet, but should be aware that if the course is linked to additional activities (i.e. discussion, lab, etc.) it will read 0 units until a section is selected. If they have 0 units it will also not be counting towards the 12 units the above report is looking for. Students can only add sections being offered in a term to their Term Plan.

STEPS

1. Go to **the Student Profile**
2. Select a **Term**
3. **Search for the student** you want to review
 - a. The Profile has three different ways you can search for a student or you can select your Advisee Listing if the student is your advisee. Ensure you select the appropriate search by option prior to providing the information in the data field.
4. Click **View Profile**

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Advising • Advisee Search

Advisee Search

Change term, search for a student, or view your advisee listing

Term
Fall 2018

View advisee listing, or search by

Student ID

Student Email

Student Name

Student ID

View Profile [View My Advisee Listing](#)

5. Once the Profile displays, select **Term Plans** from the left navigation bar

Student Profile - [Redacted]

Term: Fall 2018 | Standing: Good Standing, as of Winter 2018

Student Information | Notes: 2

Bio Information
 Email: [Redacted]
 Phone: 951 3336237
 Date of Birth: 08/19

General Information ⓘ
 Level: Undergraduate
 Class: Junior
 Status: Active
 Student Type: Continuing
 First Term Attended: Fall 2017
 Last Term Attended: Winter 2018
 Leave of Absence: Not Provided

Graduation Information
 Graduation Applications: None

Advisors
 Primary / Major Advisor: [Linda L. Nellany](#)

Navigation Menu:
 Curriculum and Courses
 Prior Education and Testing
 Additional Links
 Unofficial Transcript
 Student Schedule
 Student Summary
 Application to Graduate
Term Plans
 View Grades
 Academic Calendar

6. A new browser tab will open and you need to click on **Term Plan**

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Banner Self-Service | Student | Registration

Registration

What would you like to do?

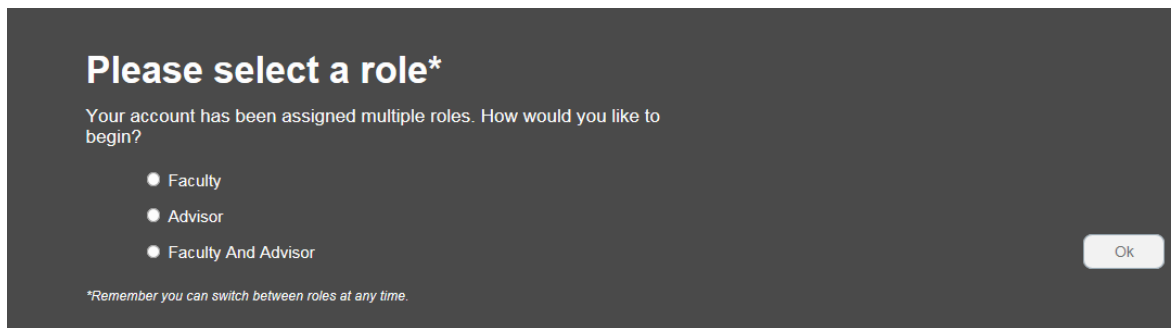
[Register for Classes \(Students Only\)](#)
 Search and register for your classes. You can also view your schedule and adjust variable unit classes.

[Browse Schedule of Classes](#)
 View sections that are being offered in a term.

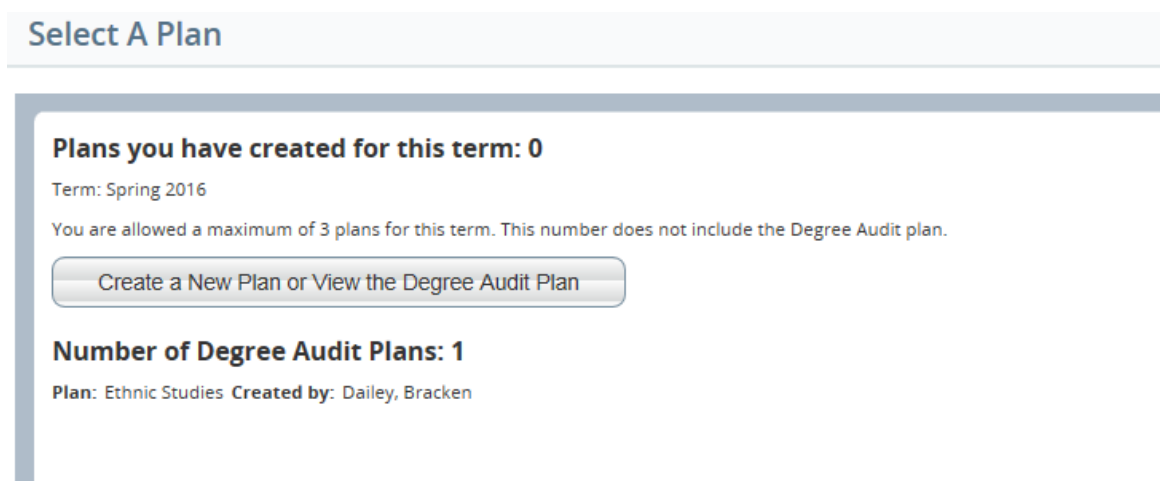
[Browse Course Catalog](#)
 Look up basic course information like subject, course description, and prerequisites. Actual sections offered in a term are listed under Browse Schedule of Classes.

Term Plan
 Give yourself a head start by building plans. When you're ready to register, you'll be able to load these plans.

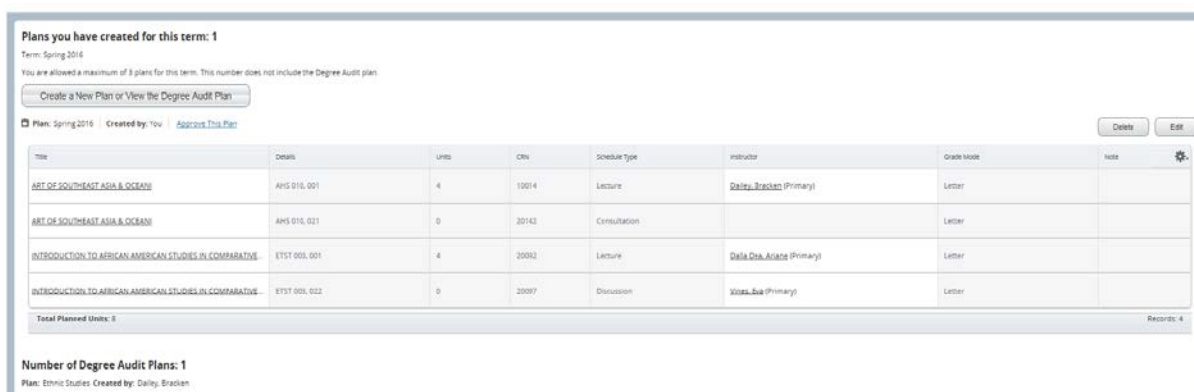
7. If you are both a Faculty member and an Advisor, you will receive a prompt to select which role you want to enter Term Plan using. You want to select either Advisor or Faculty and Advisor. Both of those roles will allow you to utilize the Term Plan functionality. Faculty do not have access to Term Plans and so that option would prevent you from moving forward appropriately.



8. Select the **Term**
9. **Search for the student**
10. Once you have your student select **Continue**
11. If the student has not yet created a term plan the screen should look similar to the one below. Note that for this student there is an available 4 year course plan from Degree Works that can be used in creating the term plan.



If the student has created a term plan the plan will show to you.



12. After you review the plan you can approve the plan by clicking on **Approve This Plan**. Once you approve the plan it should say Approved with your name.

- a. The student will be able to see that the plan is approved and your name when the student view the plan.
- 13. Most likely the student has a hold requiring approval of the Term Plan. Therefore, if the plan is approved go to SOAHOLD and clear the appropriate hold. *See Assigning and Releasing a Hold procedures.*

Plans you have created for this term: 1

Term: Spring 2016

You are allowed a maximum of 3 plans for this term. This number does not include the Degree Audit plan.

Create a New Plan or View the Degree Audit Plan

Plan: Spring 2016 Created by: You (Approved - [Bracken Dailey - Advisor](#)) | [Remove Approval](#)

Title	Details
	INTRODUCTION TO

- 14. If you do not approve the plan you will want to email the student the appropriate reasons why you did not approve it and instructions on how to adjust the plan accordingly.