HOW TO CREATE A NEW COURSE PLAN

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REVISION HISTORY

Version	Date	Name	Description
1	8.10.16	Cindy	First draft
2	9.22.16	Cindy	Second draft

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 the degree audit.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Templates will be assigned to freshmen students prior to Orientation.
2. A student may modify and save an "active" plan.
3. 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".

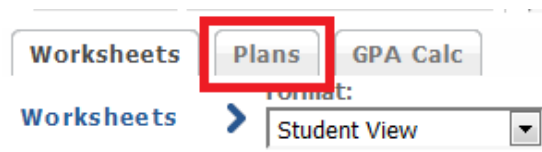## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Registrar's Office
2. College Offices
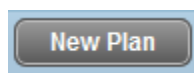3. Academic Departments

PROCEDURES

### ASSIGNING A PLAN BASED ON A TEMPLATE

STEPS

1. Once you have logged in to your degree audit, go to the **Plans** tab.

2. Click on **New Plan**. Located on the top right hand side of the page. If you don't have any plans assigned, you will be automatically prompted to create a new plan when you go to the **Plans** tab.

3. A new window will open prompting you to create a new plan. Click on **Select Template**. A template becomes a "plan" once it has been assigned and saved.
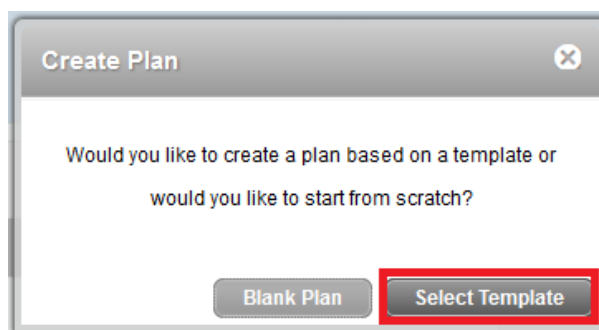
4. A list of templates will show. **Tip**: You can use the up/down arrows on each column to sort the templates.

Browse Templates

Description	Level	Colleg	Major	Degre	Catalog Year	Term Scheme	ID	Who	What	Modifie
African American Studies	U	HS	AFST	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/19/16
Anthropology B.A.	U	HS	ANTH	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/2/16
Anthropology B.A.-3Yr	U	HS	ANTH	BA	2016	FALL_START_WITH	T000018	Chavez,	NOT SET	3/17/16
Anthropology B.S.	U	HS	ANTH	BS	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/2/16
Anthropology Law & Society	U	HS	ANLW	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/2/16
Art (Studio)	U	HS	ART	BA	2015	COMPLETE_SCHE	T000003	Chavez,	NOT SET	2/2/16
Art History	U	HS	AHS	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/2/16
Art History/Administrative Studies	U	HS	AHAT	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/2/16
Art History/Religious Studies	U	HS	AHRS	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/23/16
Asian American Studies	U	HS	ASST	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/2/16
Asian Studies	U	HS	AST	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SET	2/2/16
Biochem (Biology Emphasis) Math Plac	U	NA	BCH	BS	2016	FALL_START_WITH	T000018	Chavez,	NOT SET	4/8/16

5. You can search for a template by **Description**, simply enter a word or part of a word (such as Anthro) that appears in the template description and click **Go**.

6. You can also search using filters, to do this click on the **Advanced Search** button.

7. The search window will appear below. As a default, required Template Tags initially display in the **Advanced Search** window. Template Tags consist of Level, College, Major, Degree, and Catalog Year. Additional Template Tags can be added by clicking **Add Another Tag.** Tags that are not used in your search can be removed by clicking on the "X" icon.

8. Select the tags you want to use in your search and the values from the drop-down lists.
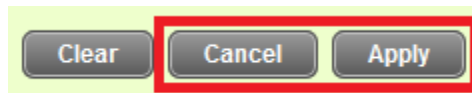

9. When you click the drop-down list for the values a new box will appear. Multiple values can be selected for filtering by checking more than one box. All selected values can be cleared by clicking **Clear**.
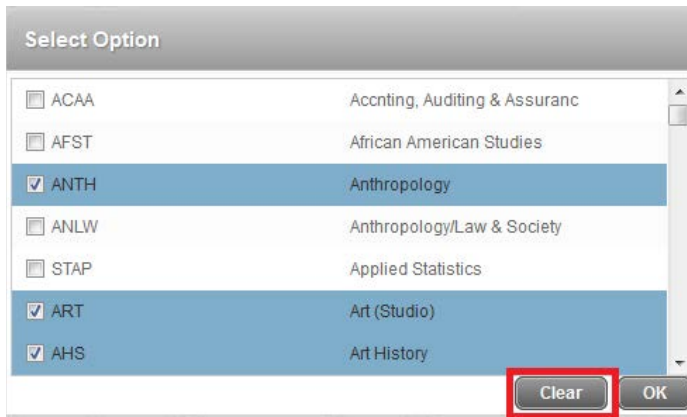
10. To filter based on selected Template Tags, click **Apply**. To go back to the template list, click **Cancel**.

11. Once you have found the template you would like to assign to your list of plans, select the template by double-clicking on it or highlight it and then click **Open**.

12. You will be asked to select a **Start Term** for the plan. Choose a start term from the drop-down menu that represents when you started at UCR. Please note that you will need to adjust courses in the plan for terms that have already taken place. See *How to Modify an Assigned Course Plan* for steps.

13. Name the plan under **Description**. By default, the description will show the name of the template selected. Keep this description. For example, "Microbiology – Math Placement 008A" will appear and then you can add a modifier after the major name such as "Microbiology – Math Placement 008A – Added 9/9/16".

14. Remember to **Save** the plan. Saving the plan also means it has been assigned to your list and you can begin to make modifications and/or make the new plan active. Please see procedures on *How to Modify an Assigned Course Plan.*
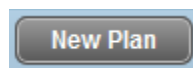
ASSIGNING A PLAN FROM SCRATCH

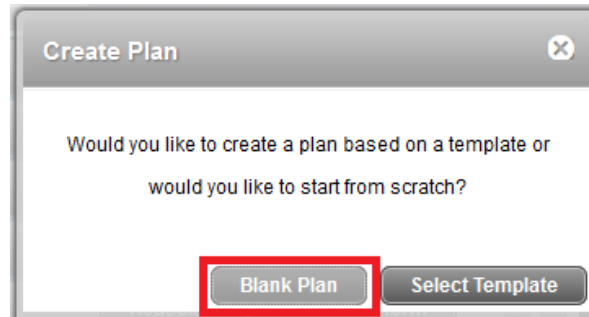### STEPS

1. Go to **New Plan**.

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

3. A New **Blank Plan** is displayed.

4. Begin by naming the new plan under **Description**.
   a. **Tip**: The name of the plan should begin with the major's name. For example, "Microbiology" and can have a modifier following it such as "Microbiology – Added 9/9/16" A description is required and can be up to 80 characters long with spaces.

   b. **Note: The Degree and Level automatically populate and cannot be changed.**
5. Requirements on a blank plan must be entered term by term.
   a. To **add** a term click on the 🞣 icon, located on the plan's header.
   b. To **delete** a term, highlight or select the term and click on ▬ icon located on the header.

6. For further instructions on adding/deleting/editing requirements please see policies and procedures on *How to Modify an Assigned Course Plan.*

7. Remember **to save** the Plan if you would like to see it on your list of plans. The **Save** button can be found at the bottom right hand side of the page.