

# 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

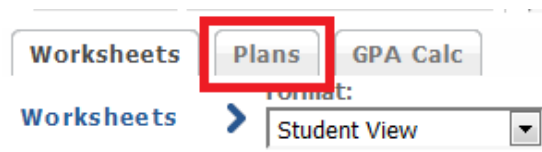
1. Registrar's Office
2. College Offices
3. Academic Departments

## PROCEDURES

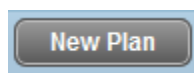
### ASSIGNING A PLAN BASED ON A TEMPLATE

#### STEPS

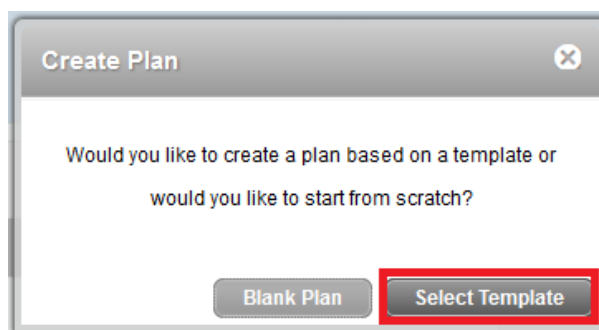
1. Once you have logged in to your degree audit, go to the **Plans** tab.



- 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.



- 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.



- A list of templates will show. **Tip:** You can use the up/down arrows on each column to sort the templates.

Browse Templates											
Search by Template Description		Go		Filter:		Advanced Search					
Open		Delete									
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 SE	2/19/16	
Anthropology B.A.	U	HS	ANTH	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SE	2/2/16	
Anthropology B.A.-3Yr	U	HS	ANTH	BA	2016	FALL_START_WIT	T000018	Chavez,	NOT SE	3/17/16	
Anthropology B.S.	U	HS	ANTH	BS	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SE	2/2/16	
Anthropology Law & Society	U	HS	ANLW	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SE	2/2/16	
Art (Studio)	U	HS	ART	BA	2015	COMPLETE_SCHE	T000003	Chavez,	NOT SE	2/2/16	
Art History	U	HS	AHS	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SE	2/2/16	
Art History/Administrative Studies	U	HS	AHAT	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SE	2/2/16	
Art History/Religious Studies	U	HS	AHRS	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SE	2/23/16	
Asian American Studies	U	HS	ASST	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SE	2/2/16	
Asian Studies	U	HS	AST	BA	2015	COMPLETE_SCHE	T000002	Chavez,	NOT SE	2/2/16	
Biochem (Biology Emphasis) Math Plac	U	NA	BCH	BS	2016	FALL_START_WIT	T000018	Chavez,	NOT SE	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**.

Browse Templates

microbiology|  Filter:

Description	Level	Colleg	Major	Degree	Catalog Year	Term Scheme	ID	Who	What	Modifie
Microbiology - Math Placement 005	U	NA	MCBL	BS	2015	COMPLETE_SCHE	T000016	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 005	U	NA	MCBL	BA	2015	COMPLETE_SCHE	T000020	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 008A	U	NA	MCBL	BS	2015	COMPLETE_SCHE	T000008	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 008A	U	NA	MCBL	BA	2015	COMPLETE_SCHE	T000020	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 008B	U	NA	MCBL	BS	2015	COMPLETE_SCHE	T000008	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 008B	U	NA	MCBL	BA	2015	COMPLETE_SCHE	T000020	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 009A	U	NA	MCBL	BS	2015	COMPLETE_SCHE	T000016	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 009A	U	NA	MCBL	BA	2015	COMPLETE_SCHE	T000020	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 009B or I	U	NA	MCBL	BA	2015	COMPLETE_SCHE	T000020	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement 009B or I	U	NA	MCBL	BS	2015	COMPLETE_SCHE	T000020	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement ARC 035	U	NA	MCBL	BS	2015	FALL_START_WITH	T000008	Chavez, I	NOT SE1	3/31/16
Microbiology - Math Placement ARC 035	U	NA	MCBL	BA	2015	FALL_START_WITH	T000020	Chavez, I	NOT SE1	3/31/16

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

Browse Templates

microbiology|  Filter:

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.

**Filter:** Advanced Search

Level	<input type="text"/>	x
College	<input type="text"/>	x
Major	<input type="text"/>	x
Degree	<input type="text"/>	x
Catalog Year	<input type="text"/>	x

**Add Another Tag**

Clear Cancel Apply

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

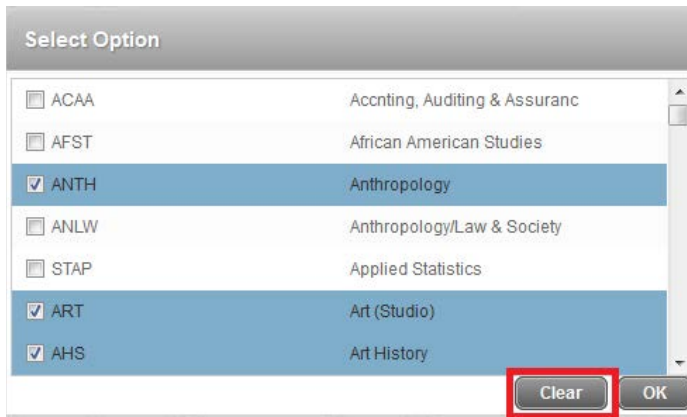
**Filter:** Advanced Search

Level	<input type="text"/>	x
College	<input type="text"/>	x
Major	<input type="text"/>	x
Degree	<input type="text"/>	x
Catalog Year	<input type="text"/>	x

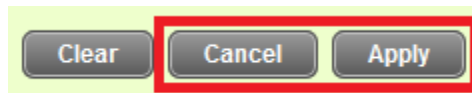
**Add Another Tag**

Clear Cancel Apply

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**.

Browse Templates

microbiology  Filter:

Description	Level	Colleg	Major	Degree	Catalog Year	Term Scheme	ID	Who	What	Modifie
Microbiology - Math Placement 005	U	NA	MCBL	BS	2015	COMPLETE_SCHE	T000016	Chavez, I	NOT SET	3/31/16
Microbiology - Math Placement 005	U	NA	MCBL	BA	2015	COMPLETE_SCHE	T000020	Chavez, I	NOT SET	3/31/16
Microbiology - Math Placement 008A	U	NA	MCBL	BS	2015	COMPLETE_SCHE	T000008	Chavez, I	NOT SET	3/31/16
Microbiology - Math Placement 008A	U	NA	MCBL	BA	2015	COMPLETE_SCHE	T000020	Chavez, I	NOT SET	3/31/16
Microbiology - Math Placement 008B	U	NA	MCBL	BS	2015	COMPLETE_SCHE	T000008	Chavez, I	NOT SET	3/31/16

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.

Select a starting Term

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

Start Term\*

Select

- Fall 2011
- Fall 2012
- Fall 2013
- Fall 2014
- Fall 2015
- Fall 2016
- Fall 2017

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”.

Description: 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*.

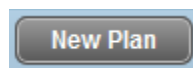
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## ASSIGNING A PLAN FROM SCRATCH

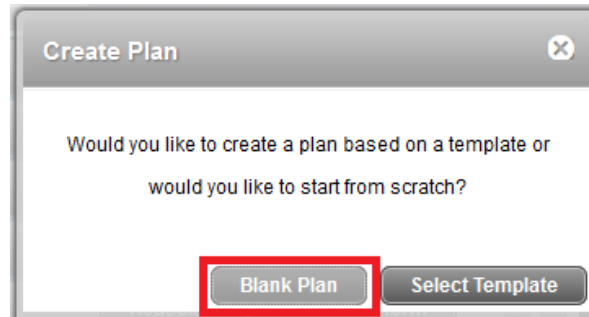
### STEPS

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1. Go to **New Plan**.



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



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

Description:   Active Status: NOT LOCKED + - 📄

Degree:  Level: Undergraduate



Disclaimer: You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.

4. Begin by naming the new plan under **Description**.
- 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.

**Description:** Microbiology - Math Placement 008A

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



Description:	<input type="text"/>	<input type="checkbox"/> Active	Status: NOT LOCKED	 
Degree:	Bachelor of Science	Level:	Undergraduate	

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.

