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As you begin to explore the Student Educational Planner (SEP), this guide will assist you with learning how to use the system to plan future classes, keep track of requirements, and record notes for students regarding their academic records.

Student Educational Planner Introduction

What is the SEP?

The DegreeWorks Student Educational Planner (SEP) is an advising tool that students and advisors can use to map out a clear pathway for timely degree completion. Advising plans created in SEP will show students the required courses within their program(s) and a recommended timeline of when they should be completed.

Why use it?

The SEP helps advisors and students work together to plan each term of coursework to ensure student success. By developing a plan, students will have a clear path of coursework needed in sequential order. In addition, advisors can use the features in the plan to identify courses that are essential to students' timely degree completion.

Getting Started

1. Go to https://dwprod.tamucc.edu:8471/DashboardServlet/
2. Log in using your DUO mobile device
3. Select a student by either entering the student’s ID or clicking the Find icon
4. Once you have selected a student, click on the “Plans” tab
   a. If a plan exists, the page will default to the Active Plan.
   b. If a plan does not exist, you will be prompted to create one.
Assigning a New Plan

There are two different options for creating a new plan: Blank Plan or Select Template. Blank Plans are useful for students that are already in progress towards their degree completion, while Templates will be most beneficial to new students who have not yet started their academic career.

Creating a Blank Plan

If a plan exists, the page will default to the Active Plan. You can create a new plan by selecting “New Plan” in the upper right corner. If a plan does not exist, then a pop-up window will give you the option to create a plan based on a template or to start from scratch. Select “Blank Plan” if you want to build a plan from scratch.

Continue to the Editing Plans section to learn more about modifying blank plans.

We recommend that you select a department-approved template for the chosen major and edit that plan to meet individual student circumstances.

Creating a Plan from a Template

After clicking “Select Template” you will be brought to the template management screen. You can toggle between the flat view and tree view to help locate plans. You may also search templates with the “Advanced Search” or “Search by Template Description”.

Select the appropriate template with correct catalog year then click “open”
***DESCRIPTION NOTE: Templates are named College-Degree-Major. Further descriptions are shown in the table below.

<table>
<thead>
<tr>
<th>Description</th>
<th>Concentration</th>
<th>Campus</th>
<th>Online</th>
<th>Specialized</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notation</td>
<td>: Health Care</td>
<td>[RELLIS]</td>
<td>(Online)</td>
<td>(Two Year)</td>
</tr>
</tbody>
</table>

Select start term (based on student's catalog) and click OK.

This brings you into the Edit View (see below to continue).

***Note: Advisors do have access to select the following views (this is located at the very top right of the plan):

**Editing Plans**

For most students, Student Educational Plans will require adjustments after selecting the template. For example, the template for the typical freshman assumes the student will need to fulfill their foreign language requirement. Students who come in with credit for this requirement will need their plan adjusted to reflect fulfilled requirement.

Under Description, remove the program name and change the description to the student's name followed by A# and (SEP Plan). For example: “Doe, John A00000000 (SEP Plan)”.
Accurate Plans = Better Forecasting: See below “Editing Tools” that will assist in editing the plan. Once the plan has been edited to the students’ needs and “audit view” is utilized (this is to make sure the plan matches the students’ course requirements needed to graduate), the Advisor will then check the “Active” and “Locked” boxes. A plan being “active” allows TAMUCC to track student activity. A plan being “locked” allows tracking status to display checking if student is “On Track” (has taken courses planned) or “Off Track” (has NOT taken courses planned). If indicator is NOT “locked” or “active” it will be reported as “not evaluated” and tracking will not be initiated for the plan.

If editing is needed for a future semester, Advisors do have the access to still edit an active/locked plan and save changes. Off-track and not tracked requirements will be editable in past terms.

Only one plan can be active. If one plan is already active and you are trying to create another, you will receive the following message. If “Yes” is selected, the new plan created will not be the active plan.

To make sure each student has one plan, you can view all plans created for the student under “View Plan List”, select and delete the plans not needed/not active. This is located at the very top right when on Edit Plan view. Since students can also view a list of plans assigned to them, to avoid confusion, make sure only one plan is present.
Editing Tools

Name the plan (if blank) by entering text in the Description box and check off the Active and Locked boxes.

Expand all Terms in plan header if you would like to see planned requirements in all terms.

Add notes to the plan by clicking the icon. There are three areas you may add notes, in the Plan header, Term header, and at course level.

Add terms to the plan by clicking the icon in the plan header (displayed at the top right of the description).

Reassign and Delete terms as needed by clicking Reassign or Delete term at term header. Selecting “Reassign” allows requirements on a term to be moved to another term.

Add a Course by Drag & Drop: Click the arrow under still needed section at the right of the screen. Drag and drop courses into desired terms.

Add a Course manually by clicking the icon at the term level and select “course”. You can then manually input the course.

***Note: The total number of planned course credits will be displayed on the term header. This value is updated when a plan is saved.

Delete a course by selecting the appropriate course, once it is highlighted in blue, click the icon at term header. The same process goes for deleting a choice requirement or placeholder.

Move Courses between semesters by clicking course and once it is highlighted in blue, drag and drop it into appropriate term.
Add a Placeholder by clicking the icon and selecting placeholder. Useful if more information is required, such as a note to remind the student to apply for graduation.

Add a Choice Requirement by clicking the icon and selecting choice. Useful if multiple courses can fulfill requirement.

Don’t forget to: Save the plan after editing. The save button is located at the very bottom right when in “Edit View”.

***NOTE: Once plan is Locked the advisor will not be able to Edit past terms. You will only save an “Active” and “Locked” plan once all editing is complete and ready for the student to view.

Choice Requirements

When there are several course options that can fulfill a planned requirement, a Choice requirement can be used. An unlimited number of options can be defined in the Choice requirement. An option can be any combination of actual courses, wildcards, or ranges.

Most templates include general choice requirements (e.g., for various categories of the core) that will need to be replaced by a course. See below for examples of choice requirements and how to select a course.

Examples of Choice Requirements

• If the department did not mention which core course would be applied to each core area, the choice requirement will list the core options until the advisor selects the course for the student’s plan. Also notice with each core choice, a core pointer is assigned. When you are not sure what the requirement is, please feel free to select the note given to the choice.

• In some instances, like the examples below, the choice requirement may be labeled with a wildcard (@) symbol.
  o This example is saying any (@) Accounting (ACCT) course with a minimum 3 credits is required. When you see a choice that is in the format “@ACCOUNTING ELECTIVE” (no space between the @) remember it is just a way to display a note/message. Some choice requirements are also given a pointer (as shown in example below). If there is a pointer
assigned to the requirement, you may view the audit to see where the pointer lands; this pointer lands in the scribed area that requires Upper-Level ACCT Electives.

- Since the foreign language area can be fulfilled by different rules, the choice requirement will say any (@) foreign language with a minimum credit of 3 required. Just like in this example with foreign language, there may be two of the same choices. The requirements are broken up in 3 credits because in some cases students may only need 3 credits to fulfill the area (if this happens, one will simply be deleted); the pointers attached will say “FORLANG1” and “FORLANG2” for this reason.

- You also may have choices that require any course number (@) with the prefix (ACCT, BLAW etc.); in this example this is to fulfill the business elective requirement. The advisor may select any course with the following prefixes with a minimum 3 credits. The notes also explain the course cannot be required in the major area; it is essential for Advisors to be familiar with the curriculum so students will not take extra courses. If you are not sure of the requirement, you may view the audit, go to the student’s worksheet, or view the catalog. When adding a prefix with @ wildcard symbol, make sure there is a space in between (as shown below).

- Any (@) course with 090 attribute is an example of what you may see with core courses. Core attribute numbers ranges from 010 to 090. Make sure when using double wildcard “@ @” that there is a space in between.
- If you select the three dots next to “@ @ with 090”, you will notice under “Attribute” Component Area Option is selected, this is because many of the core courses can fulfill this area. The way we designate the Component Area Option is with the 090 attribute. Once an advisor knows what course is planned to fill the area, they will follow the steps below in “how to select a course”.

- This choice indicates the following prefixes (ACCT, BUSI etc.) must be an upper division course number (3000 or 4000 level). The colon (:) indicates the range allowed for upper-level courses. Make sure to add a space in between the prefix and course number (as shown below).

- You also may see a choice that says any prefix (@) that is required to be a 3000 or 4000 level course. For this type of choice, make sure to add a space between the wildcard “@” and course number “3000:4999” (as shown below).

How to Select a Course
- When there are choice requirements, advisors will select/plan a course for the student by clicking the icon.
- Click the radio icon next to the desired course and select.
• If you wish to add another course.
  o Click **Add another option**
    ▪ Type in course OR search another using the magnifying glass.
    ▪ The search will filter when you start typing the course and allow you to select the one you are wanting.

"Confirm Add Requirement" Message

As the example below shows, notice the courses listed as choices may be listed twice. Some requirements have scenarios where more than one class is needed. For example, 6 credits are needed to fulfill the history core, but three (or more) courses are options. The choice is repeated because it can be planned in different ways.

For circumstances like this, once a course is selected, you may receive the following "confirm add requirement" message.
You may select OK, just be sure the same course was not selected twice.

To make sure the course is not selected twice, or you have not planned a course that is not needed, you may view the “Audit” (located at bottom right or select “Audit View”). If the planned course is not needed because the student already took the course, you will see the transferred courses in the audit and the additional planned courses at the very bottom under “additional courses”. If additional courses are planned, you may remove the courses accordingly in “Edit View”.

Plan Audit

Plan Audit

Additional Courses

HIST 1301
U.S. HISTORY TO 1865

3

Spring 2019

HIST 1302
U.S. HISTORY SINCE 1865

3

Fall 2018

HISTCORE1

HISTCORE2

Credits Applied: 113

Plan

(1)

Sum 1 2020

Plan

(2)

Sum 1 2020
Scribe Pointers

Choice requirements will not fulfill audit requirements unless a scribe pointer is attached. Pointers are created and maintained by the Registrar’s office. Below is the list of all available scribe pointers.

Note: A scribe pointer name or “Key” is only allowed a max of 12 characters.

Core Pointers:

<table>
<thead>
<tr>
<th>Name (Key)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMMCORE1</td>
<td>Communication Core Curriculum 1</td>
</tr>
<tr>
<td>COMMCORE2</td>
<td>Communication Core Curriculum 2</td>
</tr>
<tr>
<td>MATHCORE</td>
<td>Mathematics Core Curriculum</td>
</tr>
<tr>
<td>SCIENCECORE1</td>
<td>Life and Physical Sciences Core Curriculum 1</td>
</tr>
<tr>
<td>SCIENCECORE2</td>
<td>Life and Physical Sciences Core Curriculum 2</td>
</tr>
<tr>
<td>LANGCORE</td>
<td>Language, Philosophy and Culture Core Curriculum</td>
</tr>
<tr>
<td>ARTCORE</td>
<td>Creative Arts Core Curriculum</td>
</tr>
<tr>
<td>HISTCORE1</td>
<td>American History Core Curriculum 1</td>
</tr>
<tr>
<td>HISTCORE2</td>
<td>American History Core Curriculum 2</td>
</tr>
<tr>
<td>POLSCORE1</td>
<td>Government/Political Science Core Curriculum 1</td>
</tr>
<tr>
<td>POLSCORE2</td>
<td>Government/Political Science Core Curriculum 2</td>
</tr>
<tr>
<td>SOCIALCORE</td>
<td>Social and Behavioral Sciences Core Curriculum</td>
</tr>
<tr>
<td>COMPCORE1</td>
<td>Component Area Option Core Curriculum 1</td>
</tr>
<tr>
<td>COMPCORE2</td>
<td>Component Area Option Core Curriculum 2</td>
</tr>
</tbody>
</table>

Foreign Language Pointers:

<table>
<thead>
<tr>
<th>Name (Key)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA_FORLANG1</td>
<td>Liberal Arts Foreign Language 1</td>
</tr>
<tr>
<td>LA_FORLANG2</td>
<td>Liberal Arts Foreign Language 2</td>
</tr>
<tr>
<td>FORLANG1</td>
<td>Foreign Language 1</td>
</tr>
<tr>
<td>FORLANG2</td>
<td>Foreign Language 2</td>
</tr>
</tbody>
</table>
Pointers Created for Each College:

<table>
<thead>
<tr>
<th>Name (Key)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BU_ACCTELECT</td>
<td>Accounting Elective</td>
</tr>
<tr>
<td>BU_BUSIELECT</td>
<td>Business Elective</td>
</tr>
<tr>
<td>BU_ECONOELECT</td>
<td>Economics Elective</td>
</tr>
<tr>
<td>BU_FINAELECT</td>
<td>Finance Elective</td>
</tr>
<tr>
<td>BU_GENELECT</td>
<td>Non-Business Elective</td>
</tr>
<tr>
<td>BU_HCELECT</td>
<td>Health Care Elective</td>
</tr>
<tr>
<td>BU_MGMTELECT</td>
<td>Management Elective</td>
</tr>
<tr>
<td>BU_MISYELECT</td>
<td>MISY Elective</td>
</tr>
<tr>
<td>BU_MKTGELECT</td>
<td>Marketing Elective</td>
</tr>
<tr>
<td>BU_UPELECT</td>
<td>Upper-level Business Elective</td>
</tr>
<tr>
<td>EH_FOUND</td>
<td>Special Foundations Elective (KINE:PAHP)</td>
</tr>
<tr>
<td>LA_ARTELECT</td>
<td>Upper Division ARTS Elective</td>
</tr>
<tr>
<td>LA_CONV</td>
<td>Conventions, Forms, and Genres</td>
</tr>
<tr>
<td>LA_CRRIELECT</td>
<td>Criminal Justice Electives</td>
</tr>
<tr>
<td>LA_GENELECT</td>
<td>LA General Elective</td>
</tr>
<tr>
<td>LA_MUSIMUAP</td>
<td>Music Principal Applied Studio</td>
</tr>
<tr>
<td>LA_MUSIMUEN</td>
<td>Music Major Ensemble</td>
</tr>
<tr>
<td>LA_PROAPELEC</td>
<td>Media Production Applied Electives</td>
</tr>
<tr>
<td>LA_PROELECT</td>
<td>Media Production Electives</td>
</tr>
<tr>
<td>LA_PUREELEC</td>
<td>Public Relations Prescribed Electives</td>
</tr>
<tr>
<td>NH_GENELECT</td>
<td>NH General Electives</td>
</tr>
<tr>
<td>SE_ATSCELECT</td>
<td>ATSC Elective</td>
</tr>
<tr>
<td>SE_BIMSELECT</td>
<td>BIMS Elective</td>
</tr>
<tr>
<td>SE_BIOLELECT</td>
<td>BIOL Electives</td>
</tr>
<tr>
<td>SE_DESELECT</td>
<td>Designated Electives</td>
</tr>
<tr>
<td>SE_MATHELECT</td>
<td>Upper Division MATH Elective</td>
</tr>
<tr>
<td>SE_TECSELECT</td>
<td>Technical Electives</td>
</tr>
<tr>
<td>SE_UPELECT</td>
<td>Upper-Level Elective</td>
</tr>
<tr>
<td>UC_APCOURSE</td>
<td>UNVS Approved Courses</td>
</tr>
<tr>
<td>UC_APPRELECT</td>
<td>UNVS Approved Course Electives</td>
</tr>
<tr>
<td>UC_APUPELECT</td>
<td>UNVS Approved Upper-Level Course</td>
</tr>
<tr>
<td>UC_SUPPELECT</td>
<td>UNVS Supporting Electives</td>
</tr>
<tr>
<td>UC_UPCOURSE</td>
<td>UNVS Approved Upper-Level Course</td>
</tr>
<tr>
<td>UC_UPELECT</td>
<td>UNVS Upper-Level Elective</td>
</tr>
<tr>
<td>VOCATIONAL</td>
<td>Vocational Elective Course (so far only University College uses)</td>
</tr>
</tbody>
</table>
Placeholders

Placeholders are “informational only” requirements that can display what needs to be completed as a part of a degree. Any number placed in the “Value” of placeholders will not be added to the term total credits.

For every Template Created you will notice the following placeholder in the second to the last term. This is created as a friendly reminder to students, so they know what term to apply to graduate. The advisor will place the term under “Value”.

If the core was not specified in the graduation plans, you may notice some core choices in a summer 1 term (or if something was planned in summer 1, summer 2 term); we call this a “core bank”. University Core Curriculum Placeholders were created to allow advisors to drag the core credits, from core bank, to the term that plans University Core for the minimum value of credits.

***NOTE: After you drag the necessary core course to the term needed, you may delete the core placeholder; this will help alleviate any confusion of course requirements with the student.
Plan Views

Degree Works offers several options for viewing SEP plans. To switch between different views, select the “View” dropdown in the top right of SEP.

Edit View

The Edit View allows advisors and students to make changes to a plan in SEP. This is the default view. As an advisor, this is where you will likely spend most of your time, helping students update their plans. This view should be used for advanced editing of plans.

Notes View

The Notes View includes key information provided by departments for each degree program. This view highlights recommended advising notes or explanation of what the requirement is. As users scroll, they may see advising notes assigned to the degree, term, or to course requirements.
Audit View

The Audit View allows users to view a plan alongside a students’ degree audit. This differs from the traditional degree audit because it includes the courses a student “plans” to take, not just their current and past courses. In instances, where an advisor notices the audit does not display a requirement planned, the advisor will have to make sure to add the course in the student’s plan as it will be needed to graduate.

The audit view is meant for light editing. You may drag and drop from the audit into the plan or move courses from one term to another, but you cannot remove/delete courses in audit view.

Choices on the Audit

In audit view if there is a choice requirement with no selected course or no placeholder with the choice, then course will not pull up as planned in the audit.

For example, here it shows all core requirements have a “core pointer”, so the pointer will show in the audit with the credits planned/in-progress (in blue).
In this example you notice the choice was not given a pointer but is planned. This is because choices do not pull up on the audit until selected.

This last example shows the course planned/in-progress on the audit because the choice was selected.
Progress Bar

You may notice while in Audit View, even though all is “planned” in the audit, the progress bar may not be 100% in the requirements area. This is because grades have not been processed (it is “in progress”) so the percent is reduced to 98%.

![Degree Progress](image)

Calendar View

The Calendar View shows each students’ plan by term in an easy to view side-by-side manner. It also gives the option to print the active and locked plan.

![Calendar View](image)

Maintaining Templates

Templates will need to be updated in order to maintain compliance with the University catalog and curriculum standards. Senior Advisors will have access to Template Management in DegreeWorks Pre-Production environment and apply the necessary changes explained below. The roll out of new Templates will be scheduled by the DegreeWorks Team each catalog year and as needed per catalog changes.

**Note:** Templates should be named according to College-Program-Major. Reference the Description Table for more information on how to name templates.
1. Access templates by logging into Degree Works Pre-Production and choosing ‘Template Management’.

2. For new catalog year changes, it is advised to search the previous catalogs template. You can toggle between the flat view and tree view to help locate plans. You may also search templates with the “Advanced Search” or “Search by Template Description”.

3. Highlight the appropriate template and select “open” or double click the desired template.

4. On the template selected, you will change the “Template Tag” for catalog year to the new catalog year.

5. While having the new catalog up and the summary of approved changes, make the necessary course or requirement changes to the template, then click “save as”. Those with no
changes, the new catalog year (under required template tags) will be the only thing to update.

***Course changes (even those courses equivalent) will have to be updated manually for each program/template that had catalog changes.***

a. For those courses that are equivalent, where the Prefix or Course Number Changed (e.g. UCCP 1101/1102 -> UNIV 1101/1102, COMM 1321 -> COMM 3320, or HIST 3331 -> HIST 2301), the senior advisor will also update the equivalent course to the previous catalog year template (e.g. 2019). When advisors are just creating a plan for a student on a previous catalog year (e.g. student that is on 2019 catalog year), the plan will tell the student to take the current course now offered.

6. After DegreeWorks Team has scribed for the new catalog. To make sure all courses are planned, select a student with the same program and new catalog year, select “Plans” tab, click “Audit” at the bottom of the plan or “Audit View” at the top, and double check all is planned. This step is important to make sure no requirement was missed.

7. If you add a new note to a template, do not forget to check off “Copy to Plan” so the note can display to the students when the plan is selected.

For a new template to be created or adjusted, a degree plan must be submitted through Syncplicity and uploaded to the “Graduation Plans” folder. Our DegreeWorks Team has a working document of all degree programs and their associated contacts for each college, if you would like a copy please reach out to our team.

**If there is a template that needs to be deleted, please contact the DegreeWorks Team.**
Contact Information

If you have questions or concerns regarding the SEP templates, please contact your college’s Department Chairperson or Associate Dean before contacting the Registrar’s office. All plans have been approved and submitted by senior faculty and require departmental approval before any changes can be made.

SEP General Support

For any additional questions and concerns related to the SEP please contact us by email at DegreePlanner@tamucc.edu

Mary Sanchez – Degree Audit Coordinator
Kumar Kurapati – Degree Audit Specialist
Levia “Lee” Marino – Degree Audit Specialist
Christie Roberts – Associate University Registrar
Missy Chapa – University Registrar