DEGREE WORKS PLAN UNIVERSITY PROCEDURES

1. **Initial Plan Creation** (1 academic year – e.g., incoming fall = Spring, Summer (if applicable) and Fall plans; incoming spring = Fall, Spring and Summer (if applicable) plans. NOTE: Students who are planning more than 1 major should complete all 8 semesters.

   **The Student:**
   a. Receives instruction in-person and/or by videos and/or by written instruction on creating plan in Degree Works.
   b. Creates an initial plan and marks the plan as “Active” when it is complete and ready for advisor review.
      i. If a plan is to contain more than 18 semester hours in a fall or spring semester or more than 14 hours during a summer, the student should first confer with their advisor before creating this plan.
      ii. If more than one unapproved plan is active, the student removes the “Active” status from the other plans. Marking the unapproved plan as “Active” indicates that the plan reflects the current intentions of the student. Having more than one active plan will cause schedule planner to include all courses on all active plans in registration scheduling screen.
   c. Emails or meets with their advisor to review the unapproved active plan. If the student is uncertain about the plan, the plan should not be marked as active, and the student should schedule an appointment with the advisor to review and edit the plan.

2. **Plan Approval:**
   a. The advisor reviews the active unapproved plan. If the plan needs revision, either the advisor revises the plan as needed, or instructs the student to make revisions.
   b. When the advisor is satisfied that the plan is accurate for at least one academic year, then the advisor Approves (locks) the active plan.
      i. Note that marking a plan as “Locked” only prevents the student from modifying the plan. Advisors and administrators can modify a “Locked” plan. Furthermore, the “Modified by” and “Modify Date” fields shown in ecuBIC reports do not necessarily accurately indicate when a report was last modified by a student or advisor. The registrar’s office periodically runs processes that examine and sometimes modify inconsistent plan data. These processes are normally initiated by Novine Kros, so her name can be listed as “Modified By” with a new “Modify Date” even though she did not manually open or modify the plan.
   c. There must not be more than one approved (locked) plan for a given student. All approved plans must be marked as “Active.”
3. Plan revision:
   a. An approved (locked) plan should be revised when:
      i. A student changes the major or his/her plans.
      ii. A student is unable to register for a specific course(s).
   b. To revise a plan, the student should go to the approved plan and use the “Save As” option to create an unapproved copy. Unapproved (unlocked) plans created by the student can be modified using the “Save” option.
   c. When edits are complete, an email should be sent to the advisor.
   d. The advisor follows step 2 above for approving the new plan. The old plan should be unapproved. This old plan can be renamed by prepending “OBsolete” to the beginning of the description, or the old plan can be deleted.