Advisor Overview

Plans, Templates, & Notes
After Completion of Tutorial

Upon completion of this tutorial, users will have the ability to work with the following functions in DegreeWorks:

- Planner
- Templates
- Notes

Learner Outcome Expectations:

- Ability to create a student plan
- Ability to utilize templates
- Ability to review student Plan Audits
- Ability to lock & activate Final Semester Plans
- Ability to add notes to a student audit
A Final Semester Plan is necessary if the Worksheet requires more detail.

- Audits are easier if the student has accurately declared all intended degrees, majors and minors through the Office of the Registrar.
- Some departments require students to complete a plan prior to advising or receipt of the ARF form with registration pin/code.
- If the DegreeWorks Worksheet provides an accurate account of requirements, no Plan is required.
Accessing a Student Record

✓ To locate a student by using a student ID number, enter the student ID number in the Student ID box.

✓ Press Enter to process the request.

✓ DegreeWorks will begin a search for the student and a new page will open with the requested student information.
Plans are not Required

- The DegreeWorks Worksheet can be utilized in lieu of a Final Semester Plan.
- Check the box on the Application to reference the Worksheet.
- Audits will be processed via the Worksheet.

Student: [ ] From the DegreeWorks templates, I have created a plan for my advisor to activate and lock.

Student initials: [ ] Date: [ ]

Advisor: [ ] I have locked and activated the student's DegreeWorks Final Semester Plan. Once the plan is successfully completed, the student will have met the department's academic program requirements.

[ ] Successful completion of the requirements, as defined within the DegreeWorks Worksheet, will result in the student having met the department's academic program requirements.

[ ] Any anomalies in the above cited approval are recorded in a DegreeWorks "Final Semester Advisor Note..."

Advisor initials: [ ] Date: [ ]

Certifying Officer: [ ] I have entered the "Final Semester Certified" note in DegreeWorks. Provided the student meets the above mentioned advisor-directed criteria and any additional criteria within the "Final Semester Certified" note, the student fulfills all departmental requirements for this academic program.

Certifying Officer initials: [ ] Date: [ ]
Create a Plan

- The **Plans** function in **DegreeWorks** allows students and advisors to create academic plans.

- This function also allows a proposed plan to be saved for future reference.

- Created plans may be modified as needed.

- Plans Template naming conventions are critical to tracking and follow up.
Create a Plan

- To begin using the *Plans* function in *DegreeWorks*, click on the Plans tab under the ‘Name’ box.

- In the pop up window click on the ‘Select Template’ button to begin creating a plan for your student.

- This function allows users to create a plan on a student record, make a plan active and lock it once it is finalized and approved.

**Final Semester Minor**
**Final Semester Primary Degree**
**Final Semester Secondary Degree**
**Final Semester Second Major**

Plans & Templates for Graduation *must* use naming convention “Final Semester (credential) Plan”.
Using the *Plans* Function

- To begin using the *Plans* function in *DegreeWorks*, to choose the desired template.

- Click on the open button above the list of templates to select your template.

- Click the select button in the pop-up box entitled *Select a Starting Term* to choose the desired term.

- Click on the drop-down list of terms to select the starting term for your plan.

If term is other than Spring, select any term and change graduation term on next page.
✓ Begin adding the needed courses into each future semester from the list of unfulfilled requirements on the right.

✓ Click and drag a course from the list on the right to the term template to add it to a specific term.

✓ Once all of the future courses have been loaded into the plan, save the plan. Click ‘save’ in the lower right corner.
Click **Refresh** in the Still needed box to refresh the list of required courses to be sure all requirements have been planned out.

**Click Audit** to view the Plan Audit, a condensed view of the Worksheet that will include the planned courses as ‘In Progress’ courses.

Notes regarding the new plan may be added to the **Notes** tab utilizing the Final Semester Advisor predefines note. Enter specific notations following the standardized ‘Final Semester Advisor note . . .’.

Once a student’s plan has been approved, activated and locked by an advisor it is ready for review by the certifying officer.
Using **Plan Audit** in the **Planner**

Within the **Planner** function, a **Plan Audit** scenario can be viewed by clicking the Audit button.

By clicking on the **Audit Button**, a screen will appear showing a mini version of the Worksheets that includes enrolled courses as well as planned courses.

Green check marks ✅ indicate a completed requirement. A ~ blue tilde indicates an enrolled or planned requirement. A red box ❌ indicates a requirement not yet met.

Any red boxes should be planned for or addressed in a “Final Semester Advisor note”.
The Notes utility allows DegreeWorks users to document academic advising on student records. The predefined Notes are essential for the Registrar’s Office to process reports to track resolution of discrepancies in the Worksheet or PlanAudit for degree candidate students.

While anyone with access to Notes can view a note, only the person who created the note may modify or delete the note.
Click on the Notes tab to access the Notes screen.

Click View Notes to view any notes in the audit.

Click Add Note to add a note to an audit. The creator of the note and the day the note was written appear to the right of the note.

Click Modify Notes to modify an existing note.

Click Delete Notes to bring up the Delete Notes window. Delete the note by clicking on the Notes icon located to the left of the note to be deleted.

All notes pertinent to graduation audit must begin with predefined language:

** Final Semester Advisor Note . .
** Final Semester Primary Degree Certified
** Final Semester Secondary Degree Certified
** Final Semester Second Major Certified
** Final Semester Minor Certified

You may only modify those notes that you created.
Additional Hints

Listed are additional hints to aid in the use of DegreeWorks plans, templates, and notes.

- The PlanAudit feature will show exactly how each of the classes added to a “planned” audit will apply toward graduation requirements.

- Student users do not have access to search functions. Student users will never see the Find Students button, Notes Tab or the Exceptions Tab in their audit.

- Notes appear at the bottom of the WorkSheet in the student view in DegreeWorks.

- For DegreeWorks tutorial videos and Frequently Asked Questions, please visit: http://www.montana.edu/degreeworks/

- For information on the Graduation Process and Graduation Resources, please visit: http://www.montana.edu/registrar/Graduation.php
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