

MISSOURI SOUTHERN

STATE UNIVERSITY®

OFFICE OF THE REGISTRAR

DEGREE WORKS STUDENT EDUCATIONAL PLANNER ADVISOR GUIDE

September 2024

Created by Strata Information Group (SIG) on behalf of The Office of the Registrar
Questions? Contact DegreeWorks@mssu.edu
[Office of the Registrar Website](#)

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INTRODUCTION TO DEGREE WORKS STUDENT EDUCATIONAL PLANNER (SEP)

The Student Educational Planner (SEP), is a feature of Degree Works that helps advisors and students work together to plan each semester of coursework to ensure student success. By developing a plan, students will have a clear path of coursework needed each semester in sequential order. The better students can plan their academic journey, the more likely they are to stay on track and achieve their academic goals.

In addition, advisors can use the features in the plan to identify courses that are essential to students' timely degree completion. Lastly, SEP will eventually give us good data to forecast scheduling needs.

SEP allows users to track all requirements or just the ones classified as critical, then display their tracking status. If a student is deemed "off track" in one or more trackable requirements, the semester – and possibly the student plan – will be considered "off track" and then appropriate interventions can be taken to help the student succeed.

The degree audit and plan are best used together!

- The degree audit (Worksheet) shows WHAT requirements students have completed and still need for a program.
- The SEP (Plans) offers information for each semester to show students WHEN courses should be taken.

As you begin to explore and build plans in 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 progress.

OBJECTIVES

By the end of this manual the user will be able to:

1. Create a Blank Plan
2. Create a Plan from a Template
3. Add to and Modify Plans
4. Print a Plan
5. Make a Plan Active
6. Set and Interpret Planner Tracking
7. Interpret Planner Audit View
8. How to use the What-If Feature

ACCESS PLANS

1. Access Degree Works through Lionet.
2. Log into Lionet with your credentials
3. Under the Faculty Quick Links, locate Degree Works link and click on the link
4. Enter the student ID
5. Select **Plans** at the top of the Degree Works Responsive Dashboard.

MISSOURI SOUTHERN STATE UNIVERSITY

DEGREE AUDIT EXCEPTIONS **PLANS** ADMIN LINKS

Degree Works Manager

MSSU Degree Audit

Data refreshed 08/28/2024 1:14 AM

Student ID: [Redacted] ×

Select Student: [Redacted] ▾

Degree: Bachelor of Science

6. In the Plan List block, any plans that were previously created are displayed.

Plan List

[NEW PLAN](#)

Description	Active	Modified ↓	Who	Degree	Level	Status	
Test Plan	Yes	06/27/2022	Meireles, Melissa T	BS	UG	Not locked	

Page 1 of 1 Total results: 1

PLAN TYPES

There are two different options when creating a new plan, Blank Plans and Templates.

Blank Plans allows users to build a customized plan from scratch. Blank Plans are useful for students who are already in progress towards their degree completion or who are in programs for which no templates are built.

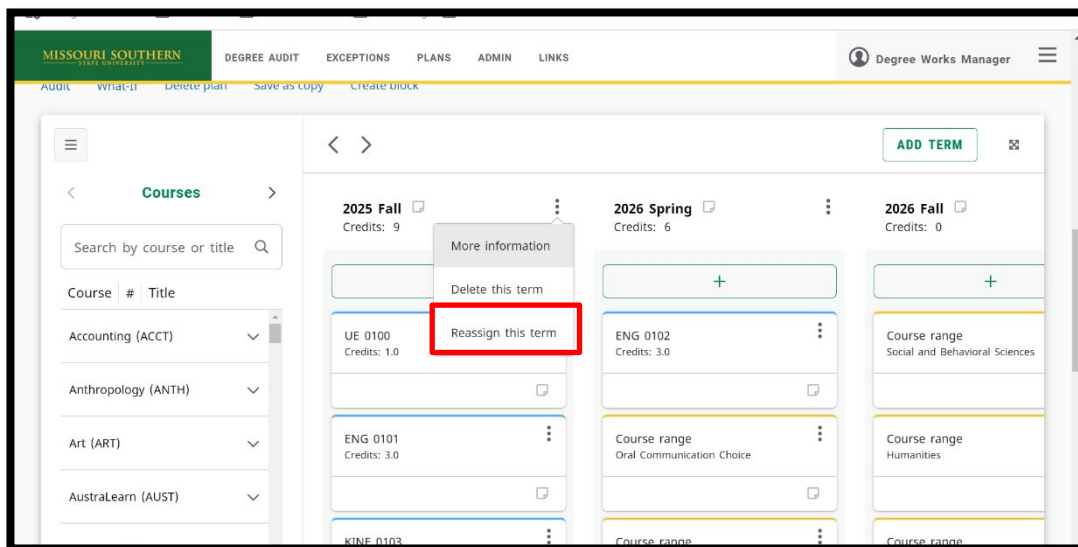
Templates allow users to select a pre-defined template with courses and semesters already added. Templates are most beneficial for new students who have not yet started their academic career. Note: users can still edit a plan if selected from a Template.

When To Use Blank Plans Vs. Templates

Blank Plans: A new Blank plan allows you to set the start term for the plan to either Fall or Spring and does not contain all of the student's requirements (GENED and Major/Minor/...). For this reason, it is recommended that Blank Plans be used to create plans for current/continuing students who have already begun their program of study.

Templates: All Templates have been built with a Fall start and contain all of the student's requirements (GENED and Major/Minor/...). It is recommended that these be used with incoming freshmen students.

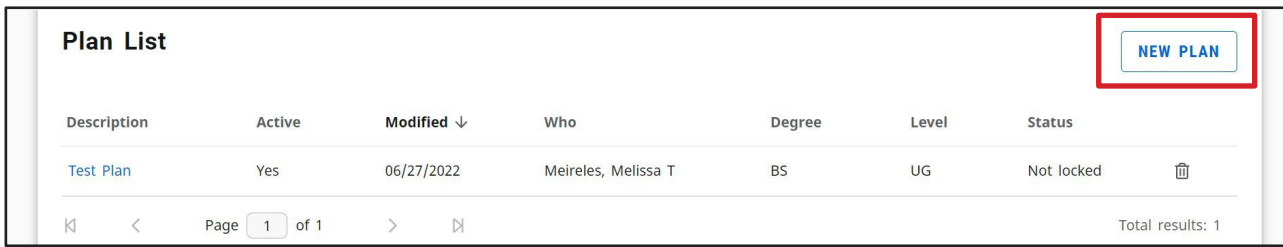
- Should a brand-new freshman start in the Spring semester the template may still be used.
- The user will need to click on the 3 dots next to the starting Fall term
- Select REASSIGN
- Move that starting Fall term to the end of the Plan. NOTE: SEP will not allow one to choose a term that is already being used by the current plan



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CREATE A BLANK PLAN

1. From the Plans tab, select **New Plan** from the Plan List Block.



The screenshot shows a 'Plan List' table with columns: Description, Active, Modified, Who, Degree, Level, Status, and an action icon. A 'NEW PLAN' button is highlighted in the top right corner. The table contains one entry: 'Test Plan', Active: Yes, Modified: 06/27/2022, Who: Meireles, Melissa T, Degree: BS, Level: UG, Status: Not locked.

Description	Active	Modified ↓	Who	Degree	Level	Status	
Test Plan	Yes	06/27/2022	Meireles, Melissa T	BS	UG	Not locked	🗑️

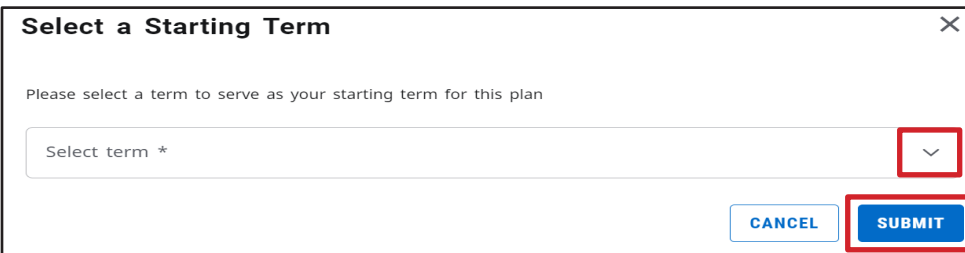
Page 1 of 1 Total results: 1

2. Select **Blank Plan**.



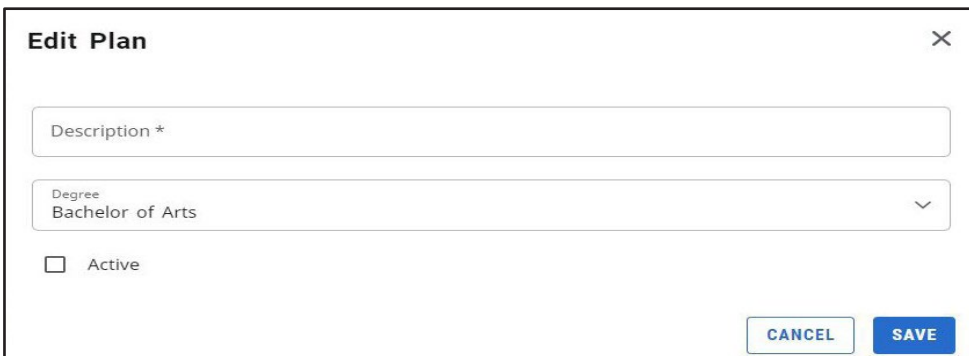
The 'Create Plan' dialog box asks: 'Would you like to create a plan based on a template or would you like to start from scratch?'. It has two buttons: 'SELECT TEMPLATE' and 'BLANK PLAN', with the latter highlighted.

3. Use the drop-down to select the **starting term** for the plan. Select **Submit**.



The 'Select a Starting Term' dialog box asks: 'Please select a term to serve as your starting term for this plan'. It features a dropdown menu labeled 'Select term *' and two buttons: 'CANCEL' and 'SUBMIT', with the latter highlighted.

4. Enter the name of the plan in the Description field.



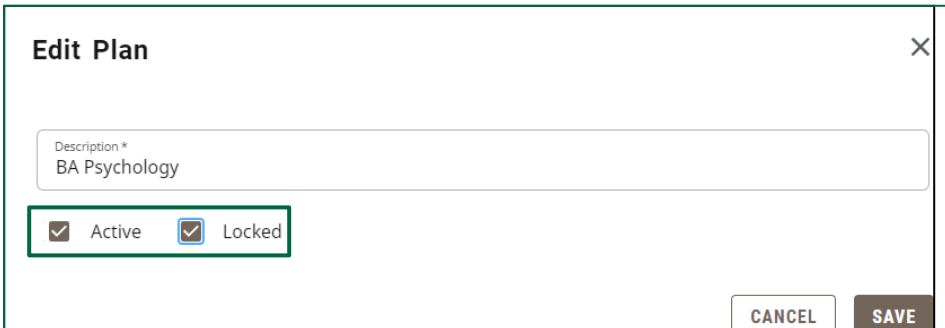
The 'Edit Plan' dialog box has a 'Description *' text field, a 'Degree' dropdown menu (currently showing 'Bachelor of Arts'), and an 'Active' checkbox. It includes 'CANCEL' and 'SAVE' buttons.

PLAN NAME FORMAT: Plan names should follow this format:

Degree-Major-Catalog Year. For example: BME-ES25-2023-2024

SEP Advisor Guide

- If a student has multiple programs of study, the Degree drop-down will be displayed. Select the **Degree** for which you are creating the plan.
- Select **Active and Locked** to enable tracking once the plan is complete.



Edit Plan [X]

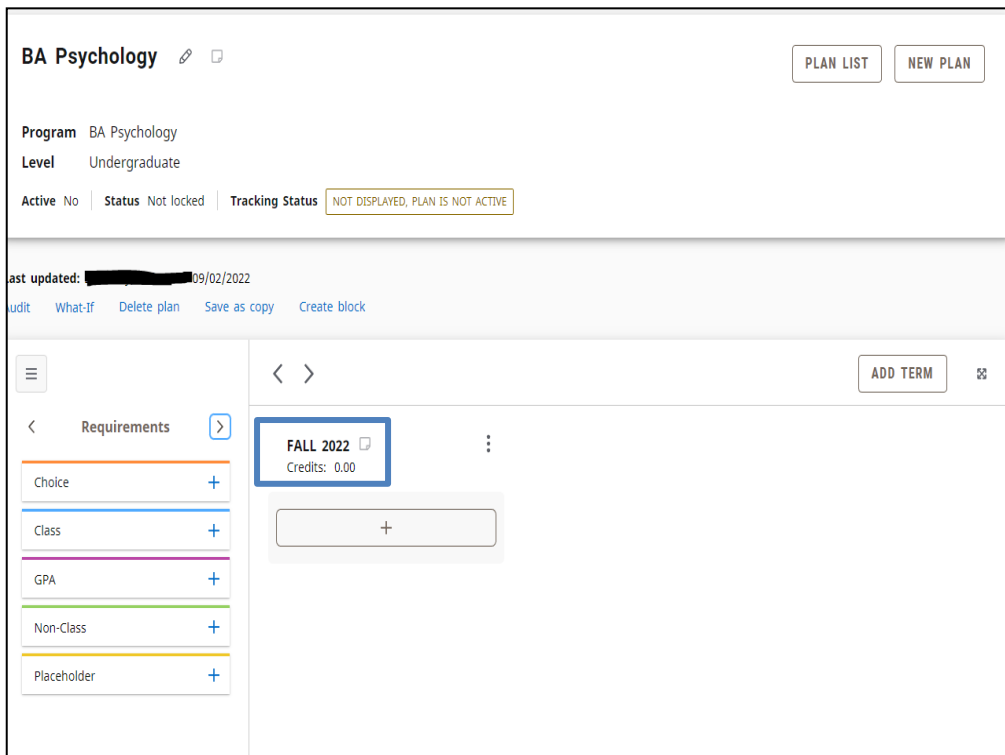
Description *
BA Psychology

Active Locked

CANCEL SAVE

A plan being “**active**” allows the institution to track student activity. Only one plan can be active. If one plan is already active and you are trying to create another, you will receive an error message:
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.

- Select Save.
- Add at least 2 additional terms by clicking the *Add Term* button and select the next sequential term from the drop-down menu and click *Add*. At least two terms need to be added in order to build the plan using the *Still Needed* feature.
- The Blank Plan will appear. Scroll down to begin adding to the plan. Note that the starting term has been added.



BA Psychology [edit] [share]

PLAN LIST NEW PLAN

Program BA Psychology
Level Undergraduate
Active No | Status Not locked | Tracking Status NOT DISPLAYED, PLAN IS NOT ACTIVE

Last updated: [redacted] 09/02/2022

Audit What-If Delete plan Save as copy Create block

Requirements [chevron right]

- Choice +
- Class +
- GPA +
- Non-Class +
- Placeholder +

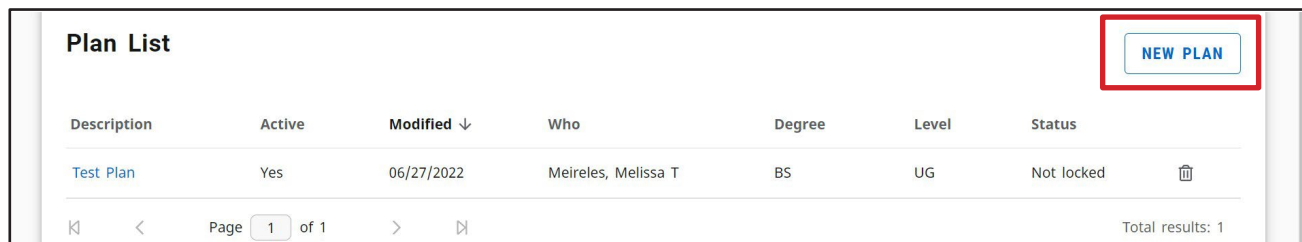
FALL 2022 [dropdown arrow]
Credits: 0.00

ADD TERM [gear icon]

CREATE A PLAN FROM A TEMPLATE

Please note that not all majors have templates available. If an appropriate template for a specific major is not found, please build a plan from scratch.

1. Select **New Plan** from the Plan List Block.

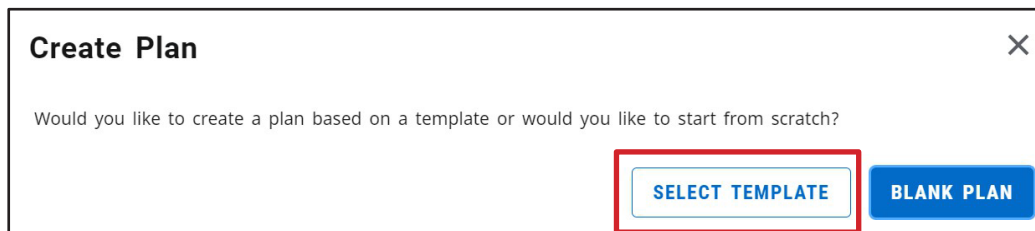


Plan List

Description	Active	Modified ↓	Who	Degree	Level	Status
Test Plan	Yes	06/27/2022	Meireles, Melissa T	BS	UG	Not locked

Page 1 of 1 Total results: 1

2. Choose **Select Template**.

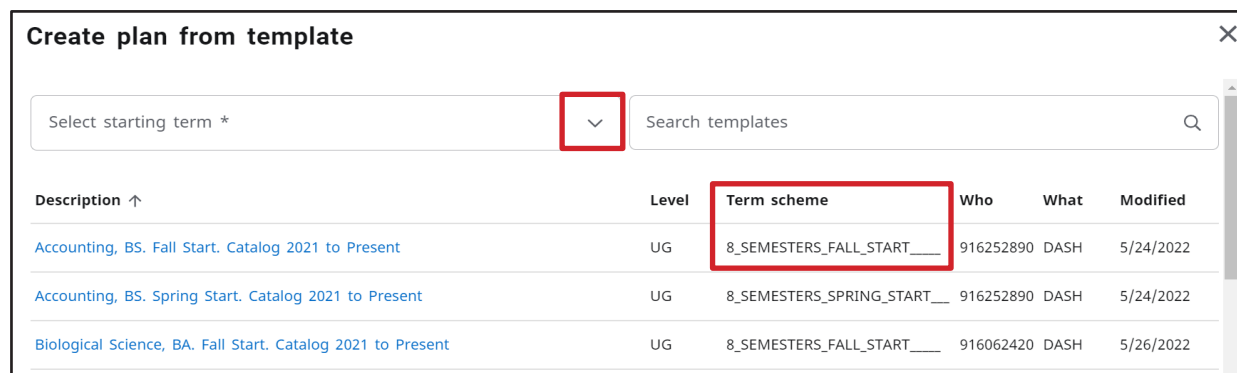


Create Plan [X]

Would you like to create a plan based on a template or would you like to start from scratch?

SELECT TEMPLATE **BLANK PLAN**

3. The list of plans will appear. The “Term Scheme” column states the number of terms that have been planned and the term that the plan starts. Use the drop-down to select the **starting term** for the plan.



Create plan from template [X]

Select starting term * Search templates

Description ↑	Level	Term scheme	Who	What	Modified
Accounting, BS. Fall Start. Catalog 2021 to Present	UG	8_SEMESTERS_FALL_START____	916252890	DASH	5/24/2022
Accounting, BS. Spring Start. Catalog 2021 to Present	UG	8_SEMESTERS_SPRING_START____	916252890	DASH	5/24/2022
Biological Science, BA. Fall Start. Catalog 2021 to Present	UG	8_SEMESTERS_FALL_START____	916062420	DASH	5/26/2022

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- Use the Search Templates field to narrow down the list or select the **name of the template** from the list. Note: The starting term must match the term start in the "Term Scheme" column. If they do not match an error message will appear.

Description ↑	Level	Term scheme	Who	What	Modified
Accounting, BS. Fall Start. Catalog 2021 to Present	UG	8_SEMESTERS_FALL_START____	916252890	DASH	5/24/2022
Accounting, BS. Spring Start. Catalog 2021 to Present	UG	8_SEMESTERS_SPRING_START__	916252890	DASH	5/24/2022
Biological Science, BA. Fall Start. Catalog 2021 to Present	UG	8_SEMESTERS_FALL_START____	916062420	DASH	5/26/2022

- The plan template will appear. Select the **pencil icon** to edit the plan's description.

Accounting BS - Fall 2021


[PLAN LIST](#) [NEW PLAN](#)


Degree Bachelor of Science
Level Undergraduate


Active No | **Status** Not locked | **Tracking Status** NOT DISPLAYED, PLAN IS NOT ACTIVE


Last updated: Meireles, Melissa T on 07/15/2022

[Audit](#) [Delete plan](#) [Save as copy](#)

Fall 2021  Credits: 16.0

Spring 2022  Credits: 15.0

Fall 2022  Credits: 15.0

ADD TERM 

Still Needed

ECON 04102 Credits: 3.0

COMP 01112 Credits: 3.0

ACC 03210 Credits: 3.0

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6. If needed, modify the name of the plan in the Description field.



Edit Plan [X]

Description*
Political Science BA - Fall 2021

Degree
Bachelor of Arts [v]

Active

CANCEL SAVE

7. If a student has multiple programs of study, the Degree drop-down will display. Select the **Degree** for which a plan is being created.
8. Select **Active and Locked** to enable tracking.
9. Select **Save**.

Create a Plan with a Spring Start

All of the templates in the MSSU SEP system have been created as 4-year, fall start plans. That means that if you are using a template you will always have to choose a Fall semester as the starting term of your plan.

So, then, how does one create a plan for a student beginning in a Spring semester? There are 2 ways do this:

#1. Users can create a BLANK plan.

- Select the starting Spring term for the plan, give the plan a name and build it as normal.

Select a Starting Term ✕

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

Select term *
2025 Spring ▾

CANCEL SUBMIT

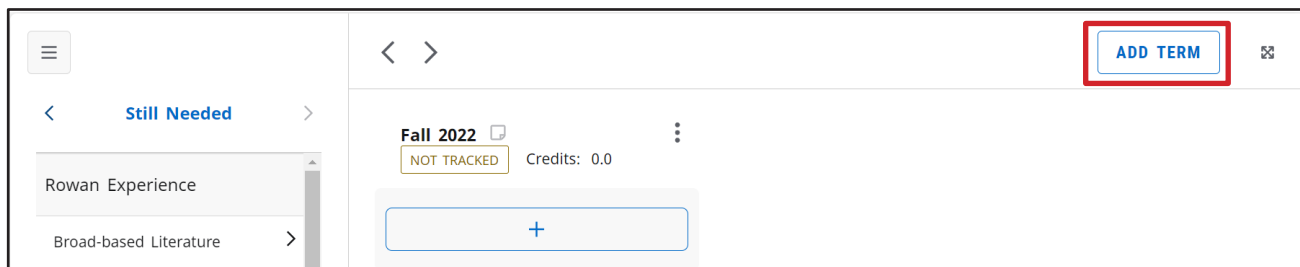
#2. Users can create a plan using a Template, but will have to choose a Fall start since all of the templates are built as 4-year, Fall start plans.

- Users will need to move/reassign requirements to the correct semester.
- For detailed instructions on how to move/reassign requirements please visit the [How to Modify A Plan](#) section of this guide.

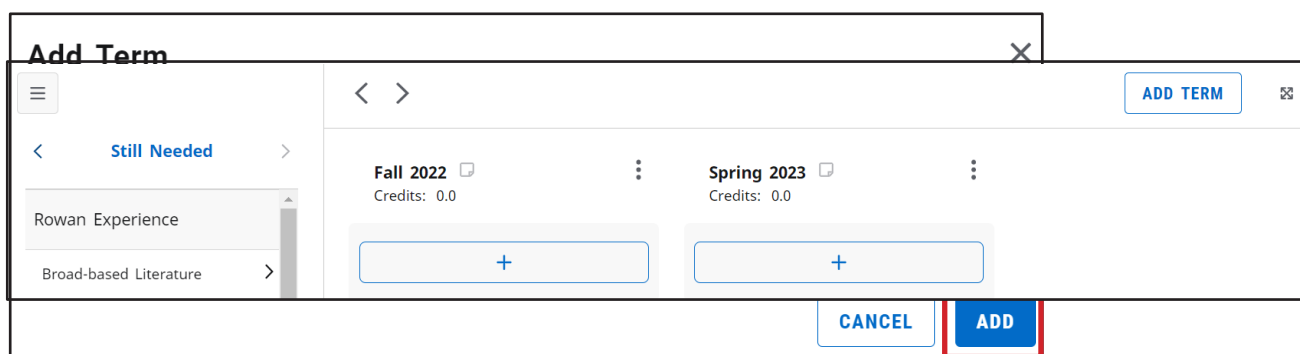
ADD A TERM

Users can add other terms to the plan to continue mapping out coursework.

1. Select **Add Term** on the right side of the screen.



2. Use the drop-down to select the **term** for the plan. Select **Add**.



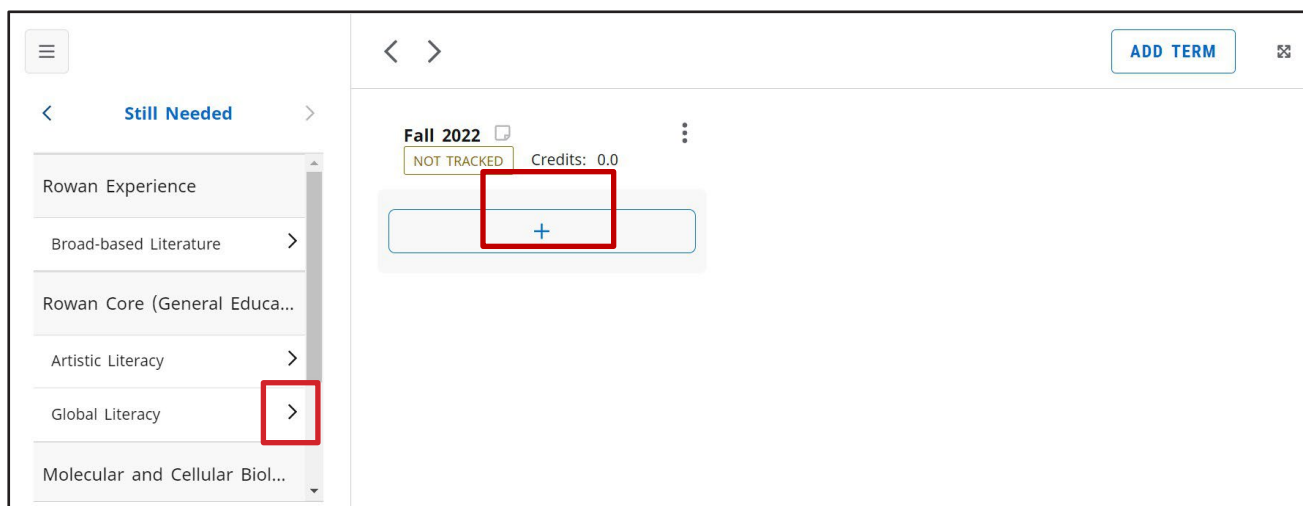
3. The term will appear on the plan. Repeat the process to add more terms.

4. NOTE: At least two terms need to be added in order to use the *Still Needed* feature.

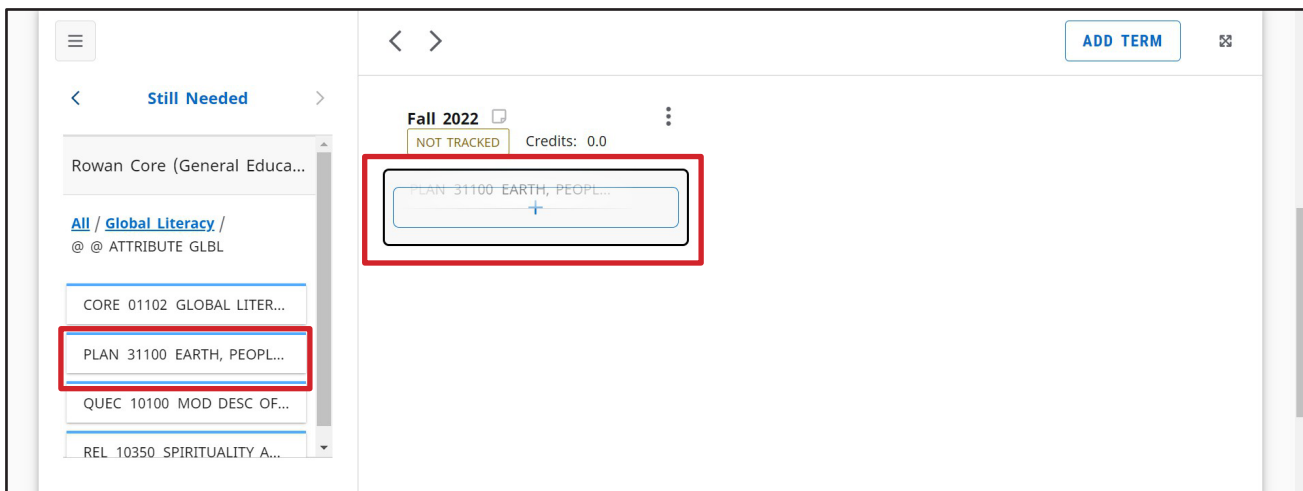
ADD A COURSE THAT IS STILL NEEDED

NOTE: This is the preferred method of adding courses as it will only display requirements that have not been taken or planned for in the CURRENT major. However, advisors who are advising for a change of major should NOT use this feature.

1. On the left side of the screen are the categories for the degree requirements that are still needed. Select the arrow next to the category to view the courses. Users can also click the + sign under the semester to which they wish to add courses.

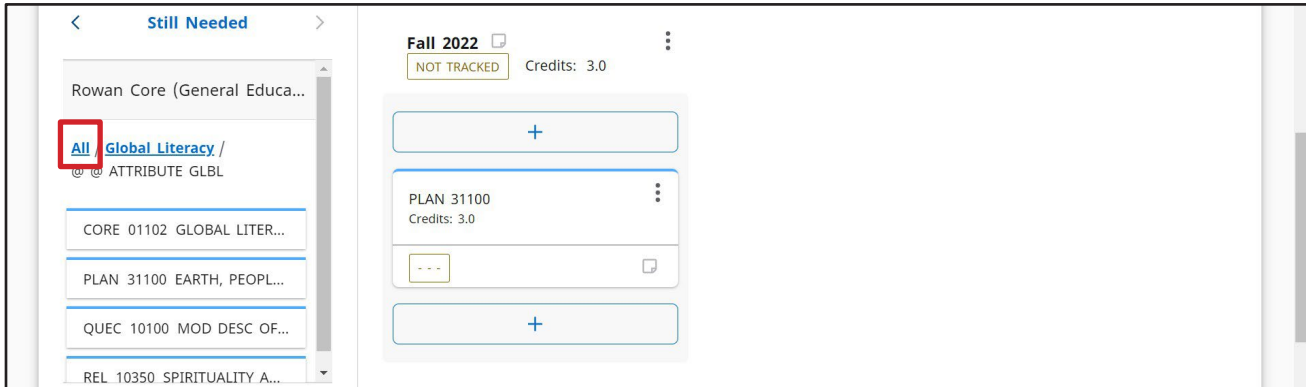


2. Select the **course** and drag it to the + icon under the name of the appropriate term.



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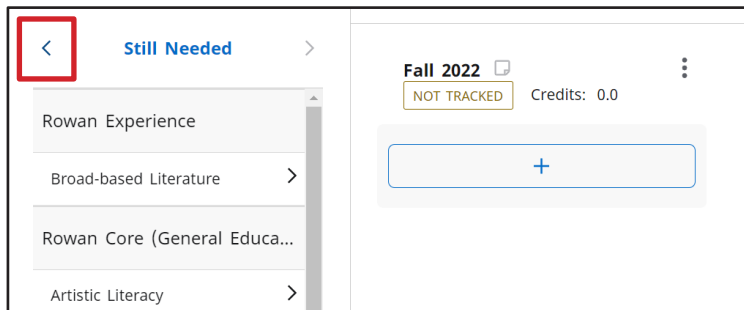
- The course is listed under the term. Select **All** to return to the full list of categories for the requirements that are still needed.



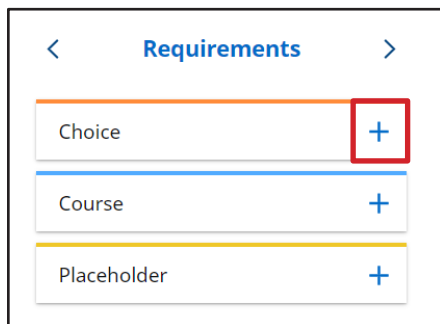
ADD A CHOICE REQUIREMENT

A choice requirement is used when a student can choose from multiple courses (ex. this course OR that course). A choice requirement is also used when a course must be paired with another course (ex. this course AND that course). Finally, a choice requirement is used to indicate a free elective (@ @) or other course with a “wildcard” symbol (@).

1. On the left side of the screen is the Still Needed section. Select the **left arrow**.



2. Select the **+ icon** next to Choice.



3. Use the term drop-down to select the appropriate **term**.



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4. Add a course by searching course name or subject/number. Users can also add requirements based off of Attribute (if applicable).

Choice requirement Add

Course Attribute

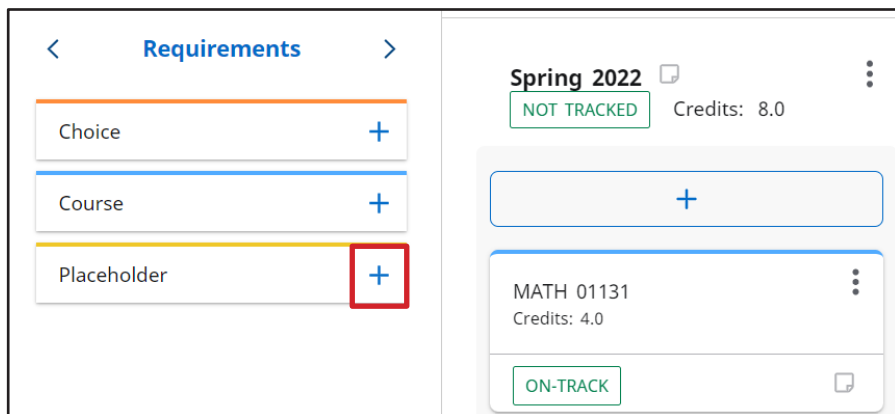
Add a paired course or lab

5. Select **Add** to add another course.
6. Optional: Enter the number of credits, minimum grade, select the campus and delivery.
7. Select **Save**.

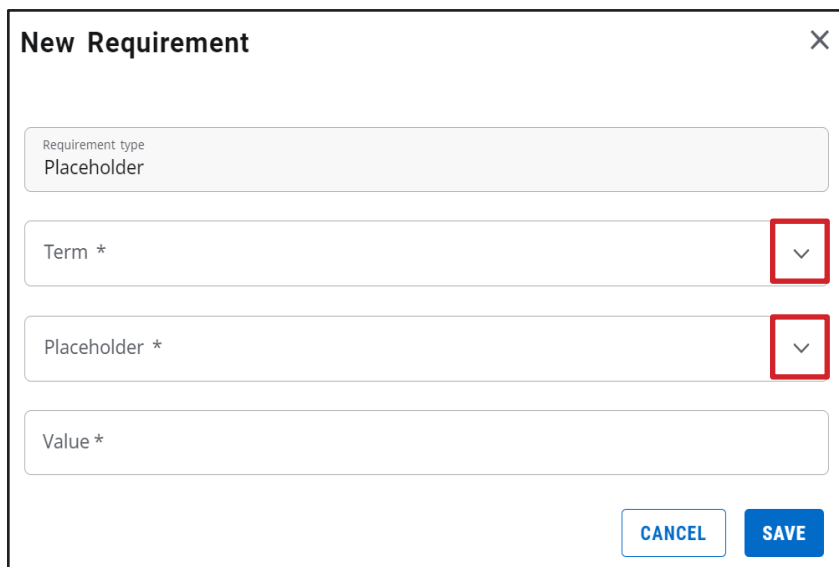
ADD A PLACEHOLDER

A placeholder is used for elective credits, internships, etc.

1. From the Requirements section, select the **+** icon next to Placeholder.



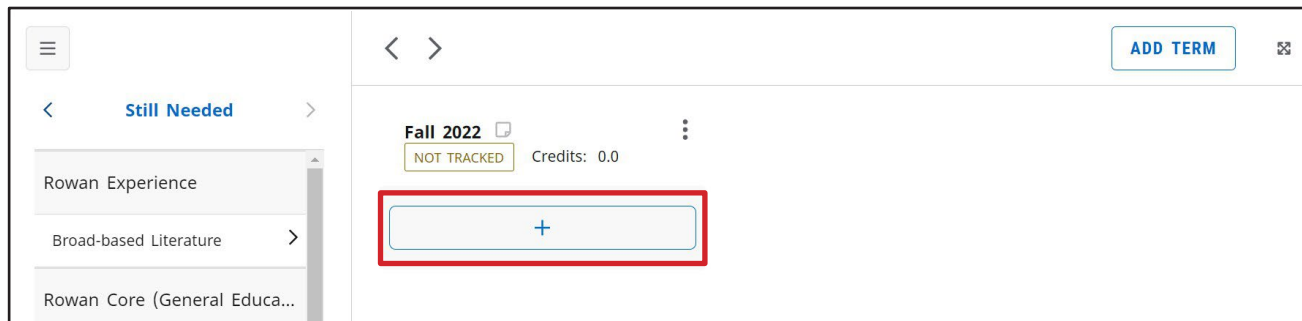
2. Use the drop-downs to select the **term** and **placeholder**.

A screenshot of a 'New Requirement' form. The form has a title bar with 'New Requirement' and a close button (X). Below the title bar, there are four input fields: 'Requirement type' (with 'Placeholder' selected), 'Term *' (with a dropdown arrow), 'Placeholder *' (with a dropdown arrow), and 'Value *'. The dropdown arrows for 'Term *' and 'Placeholder *' are highlighted with red rectangular boxes. At the bottom right of the form, there are two buttons: 'CANCEL' and 'SAVE'.

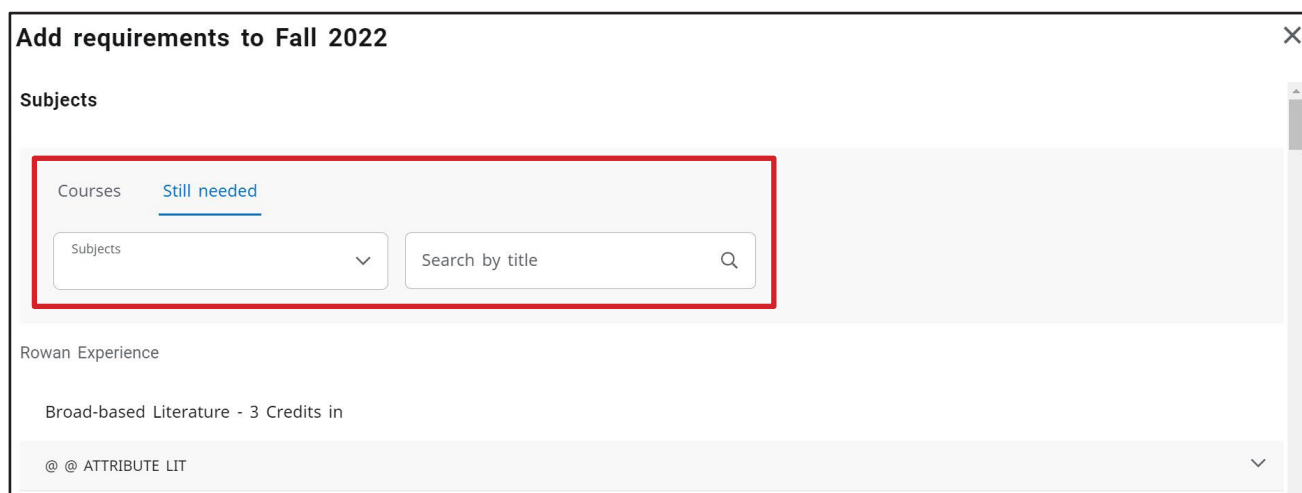
3. Enter the **value**. The value is the note that will display on the plan. Note: Placeholders do not count toward the credit total and will not check off requirements on the plan. Any number placed in the value field will not be added to the term's total credits.
4. Select **Save**.

ADD MULTIPLE COURSES

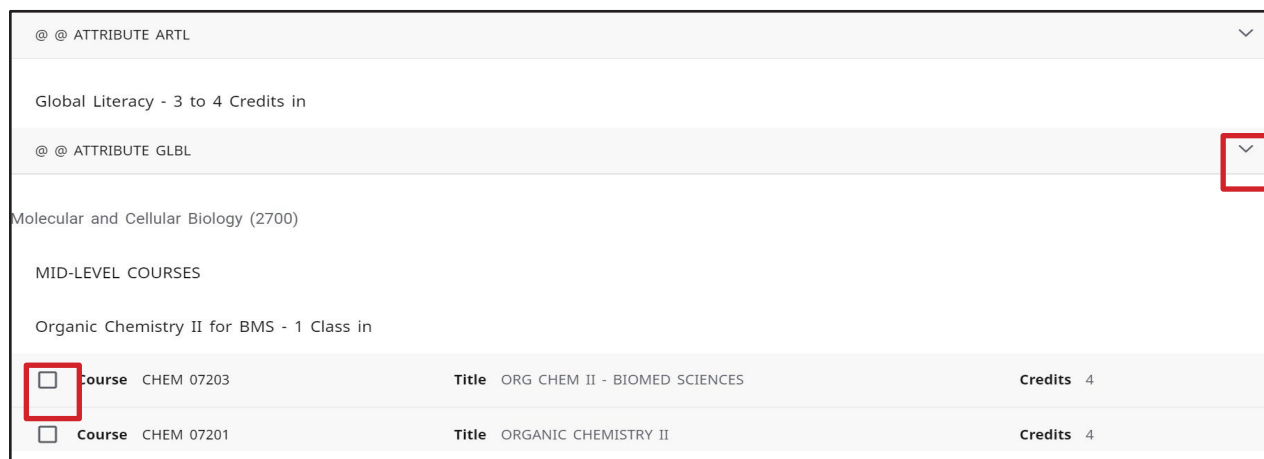
1. Select the **+** icon under the name of the appropriate term.



2. The degree requirements that are still needed are listed. Browse through the list or use the Subjects dropdown and Search by title field to search for a specific course. Select **Courses** to search from all courses.



3. Select the **down arrow** to expand a section. Select the **check boxes for all of the courses** you would like to add to the plan.



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4. Scroll to the bottom of the window to see the selected courses. Click the **X** next to any course you no longer want to add to the plan. When the correct courses are shown, click **Add to Plan**.

The screenshot shows a user interface for selecting courses. At the top, there is a table with two rows of course information:

<input type="checkbox"/>	Course	Title	Credits
<input type="checkbox"/>	MCB 01481	CELLULAR/MOLECULAR NEUROSCIENC	3
<input type="checkbox"/>	PSY 10315	PHYSIOLOGICAL PSYCHOLOGY	3

Below the table is a horizontal bar containing four course selection buttons: CHEM 07201 X, BINF 07310 X, MCB 01201 X, and PLAN 31100 X. To the right of this bar are two buttons: a light blue 'CANCEL' button and a blue 'ADD TO PLAN' button. Red boxes highlight the selection bar and the 'ADD TO PLAN' button.

5. All of the courses will be added under the appropriate term.

REVIEW PLAN

If a student creates a plan, as the advisor you can approve it by setting the ACTIVE and LOCKED settings (students do not have access to set plans as ACTIVE or LOCKED). Once a plan is active, the system will track whether a student is on track or off track. Students and advisors should review the plan to determine whether the student's registration is "on-track."

Under the course name you will see, "On-track" or "Warning".

- **On-track** means that the student is registered for or has taken the course as planned.
- **Warning** means the requirement has not been met (not taken, failed, withdrawn, etc.).

Term	Credits	Status	Course	Credits
Fall 2021	16.0	NOT TRACKED	ECON 04102	3.0
Fall 2021	16.0	ON-TRACK	BUS 01100	1.0
Fall 2021	16.0	ON-TRACK	ACC 03150	3.0
Fall 2021	16.0	ON-TRACK	MATH 01130 or MATH 03125	3.0
Spring 2022	15.0	NOT TRACKED	COMP 01112	3.0
Spring 2022	15.0	ON-TRACK	ECON 04101	3.0
Spring 2022	15.0	WARNING	MKT 09200	3.0
Spring 2022	15.0	@ @ with LIT	@ @ with LIT	3.0
Fall 2022	12.0	NOT TRACKED	MIS 02234	3.0
Fall 2022	12.0	---	ACC 03210	3.0
Fall 2022	12.0	---	STAT 02260	3.0
Fall 2022	12.0	---	@ @ with ARTL	3.0

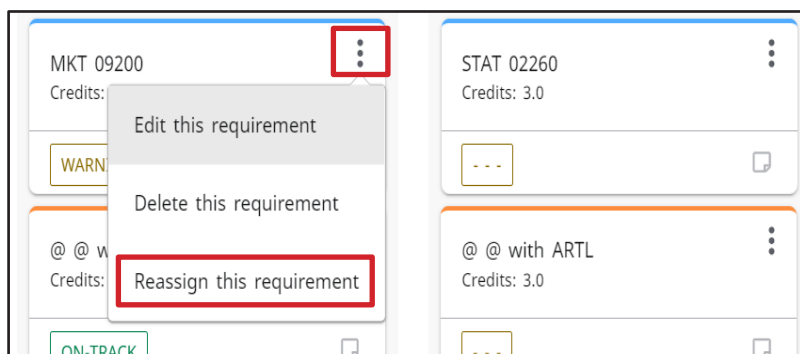
MODIFY THE PLAN

Should users need to adjust a created plan or a chosen template, there are several ways to do this.

Reassign Requirements

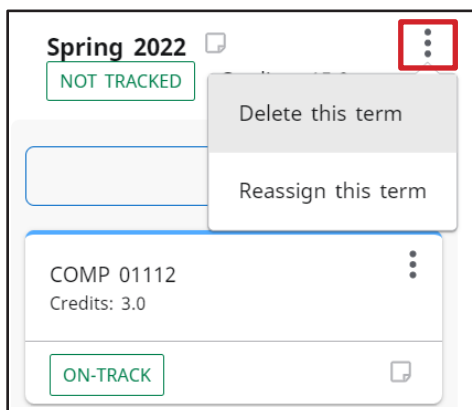
Requirements can be moved between terms by selecting the requirement, then dragging and dropping it into the appropriate term.

Users can also select the **ellipsis** for the requirement then select **Reassign this requirement**.



Reassign or Delete a Term

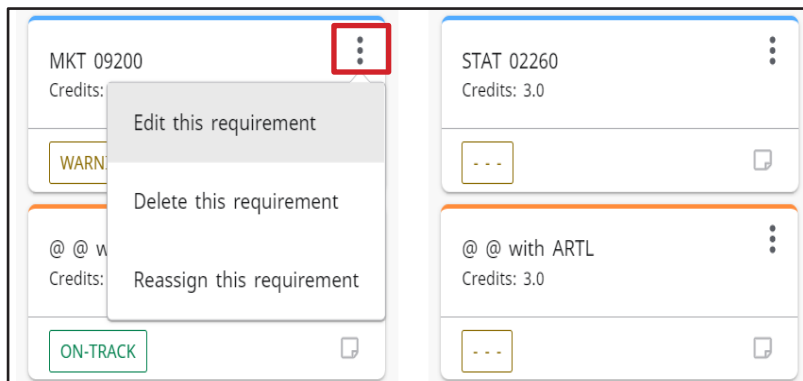
Users can reassign or delete an entire term at once. Select the **ellipsis** for the term then select **Delete this Term** or **Reassign this term**.



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Edit or Delete Requirements

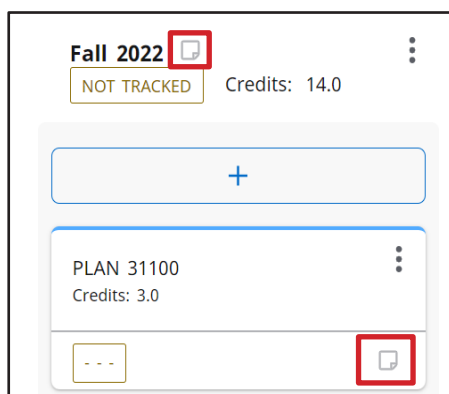
Select the **ellipsis** for the requirement then select **Edit this requirement** or **Delete this requirement**.



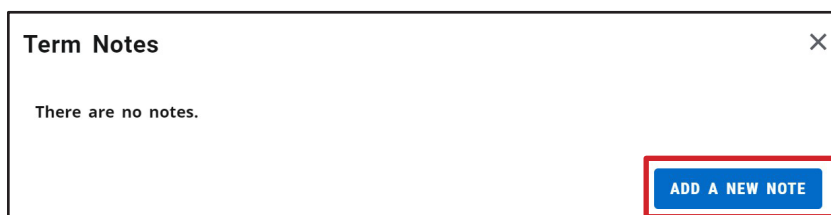
Add a Note

Users can add a note to a plan, a term, or a course.

1. Select **note icon**.

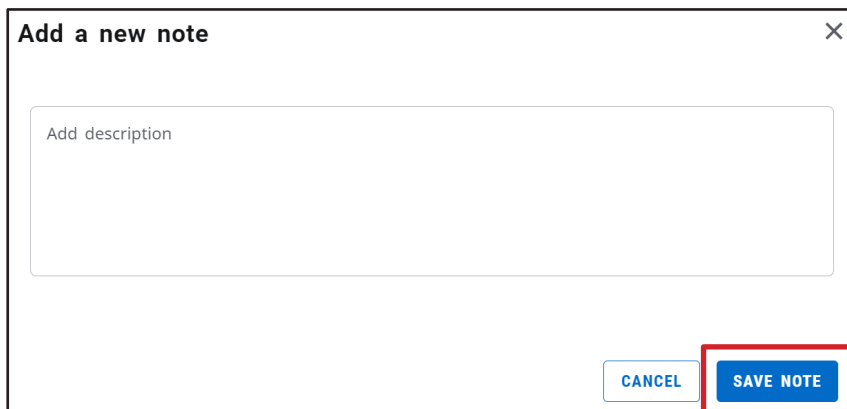




2. Select **Add a New Note**.



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3. Enter the note in the Description field. Select **Save Note**.



4. Once a note is added the note icon color changes from  gray to  blue on the plan.

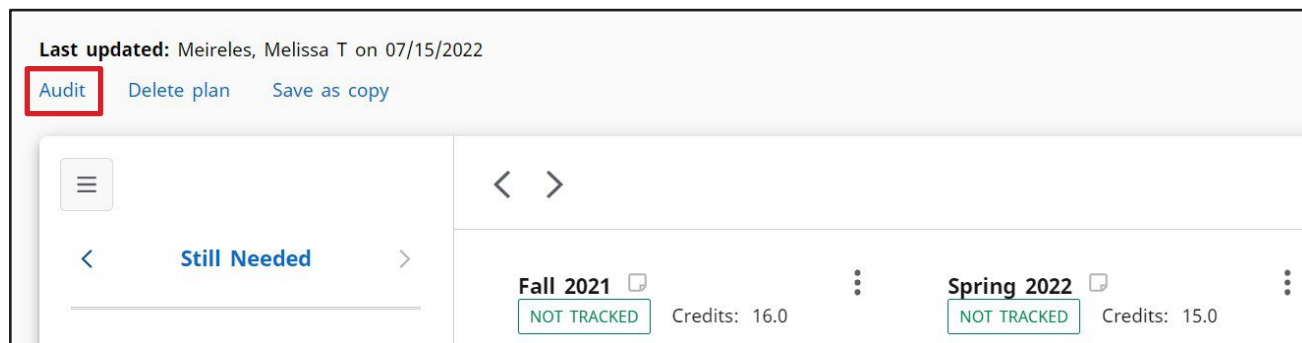
NOTE: Most notes are visible to all Planner users unless the “Not visible to student” button is selected. Even so, please keep the following in mind:

- Notes are meant to provide additional, helpful information for the student, advisor or any staff member who may need to review the student’s record in Degree Works
- Do not write anything in the note that you would not want the university president to read.
- This is not the place to write any personal opinions or thoughts about the student and/or another staff member.
- Be professional and discreet.

PLANNER AUDIT

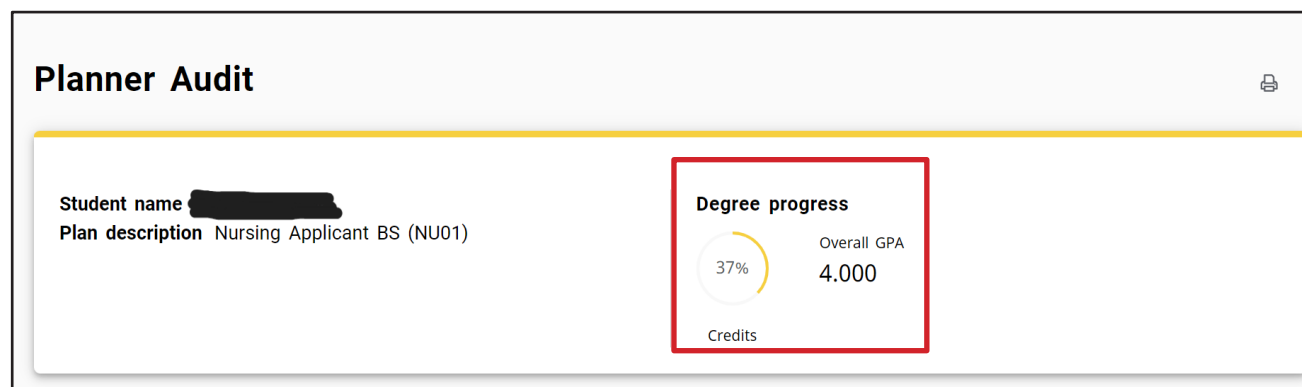
The Audit allows users to view the requirements that are satisfied by the plan created. This differs from the traditional degree audit because it includes the courses a user plans to take, not just the current or past courses taken. Note: A choice requirement with the @ symbol will not appear as planned on the Audit View.

1. At the top left corner of the plan, select **Audit**.



The screenshot shows the top management area of a plan. At the top left, it says "Last updated: Meireles, Melissa T on 07/15/2022". Below this are three buttons: "Audit" (highlighted with a red box), "Delete plan", and "Save as copy". Below the buttons is a navigation bar with a menu icon, a "Still Needed" label, and navigation arrows. To the right, there are two semester sections: "Fall 2021" and "Spring 2022". Each section has a "NOT TRACKED" status box, a credit count (16.0 for Fall, 15.0 for Spring), and a vertical ellipsis menu icon.

2. The Planner Audit will appear. Degree progress shows the percentage of Credits fulfilled by the courses taken and planned. Note: Progress will not equal 100% until all of the courses are complete and graded.



The screenshot shows the "Planner Audit" page. At the top left is the title "Planner Audit" and a print icon. Below the title is a yellow horizontal bar. Underneath, there is a section for student information: "Student name" followed by a redacted name, and "Plan description" followed by "Nursing Applicant BS (NU01)". To the right of this information is a "Degree progress" section, which is highlighted with a red box. This section contains a circular progress indicator showing "37%" and the text "Credits" below it. To the right of the progress indicator, it says "Overall GPA 4.000".

SEP Advisor Guide

3. Review the audit to ensure the plan matches the course requirements needed to graduate. Requirements that are in-progress or planned for are denoted by a blue half-filled circle. PLAN will be listed under the Grade column and the planned term is listed under the Term column.

	Course	Title	Grade	Credits	Term	Repeated
ⓘ	Non-Program Electives					
⊕	Intro to Economics - Microeconomics (Satisfies Humanistic Literacy)	ECON 04102	INTRO ECON-MICROECON	B	3	Fall 2020
⊕	Intro to Economics - Macroeconomics (Satisfies Humanistic Literacy)	ECON 04101	INTRO ECON-MACROECON	B-	3	Spring 2021
⊕	Calc Techniques & Applications or Calc I - Minimum Grade C- (Satisfies Quantitative Literacy)	MATH 03125	CALC TECHNIC/APPLIC	B	3	Spring 2021
ⓘ	Statistics I - Minimum Grade C- (Satisfies Quantitative Literacy)	STAT 02260	STATISTICS I	R	(3)	Fall 2022
ⓘ	Statistics II	STAT 02261	STATISTICS II	PLAN	(3)	Spring 2023

4. Requirements that have not been completed or planned for are denoted by a red circle. Add these courses when modifying the plan.

⊕	Legal Environment of Business	MGT 98242	LEGAL ENVIRONMENT	D	3	Spring 2022
ⓘ	Organizational Behavior	MGT 06300	ORGANIZATIONAL BEHAVIOR	PLAN	(3)	Fall 2023
ⓘ	Principles of Finance	FIN 04300	PRINCIPLES OF FINANCE	PLAN	(3)	Spring 2024
ⓘ	Operations Management	MGT 06305	OPERATIONS MGMT	PLAN	(3)	Fall 2023
○	Business Policy	Still needed:	1 Class in MGT 06402			



5. Review the Additional Courses block. This block lists any courses that are not currently used to fulfill specific degree requirements. Ideally, one does not want PLANNED courses to appear in this block. If they do, please review these courses with your advisee before they register. An exception may be needed or a different course may be more appropriate.


Additional Courses						
Credits applied: 16		Classes applied: 6				
Course	Title	Grade	Credits	Term	Repeated	
BIO 0221	Human Anatomy & Physiology II	PLAN	(5)	2025 Spring		
BIO 0231	General & Medical Microbiology	PLAN	(5)	2025 Fall		

PRINT VIEW

The Print View condenses the plan and displays the course titles. Users can use the print view to either print the plan or save it as a PDF.

1. At the top right corner of the plan, select the **Print Icon**.

Plans  



Data refreshed 09/21/2022 10:28 AM 

Student ID: [redacted] Name: [redacted] Degree: Bachelor of Science

Advanced search


Level: Undergraduate Classification: 1) Freshman Major: Biological Science - UG Program: Biological Science (BS) College: College of Sci & Math

Advisor: [redacted]

Biological Science, BS. Fall Start. Catalog 2021 to Present   [PLAN LIST](#) [NEW PLAN](#)

Degree: Bachelor of Science
Level: Undergraduate
Active: Yes | Tracking Status: NOT TRACKED

2. The Print View will open in a new tab. All of the semesters and courses added to the plan will be visible. Select the **Print Icon** to save the plan as a PDF or to print it.

Student name: [redacted] 

Plan Description: Biological Science, BS. Fall Start. Catalog 2021 to Present Tracking Status: NOT TRACKED

Active: Yes
Last updated: [redacted]

Level: Undergraduate Classification: 1) Freshman Major: Biological Science - UG Program: Biological Science (BS) College: College of Sci & Math

Advisor: [redacted]

Fall 2022	Spring 2023	Fall 2023	Spring 2024	Fall 2024	Spring 2025	Fall 2025
NOT TRACKED	NOT TRACKED	NOT TRACKED	NOT TRACKED	NOT TRACKED	NOT TRACKED	NOT TRACKED
Credits: 16.0	Credits: 15.0	Credits: 19.0	Credits: 8.0	Credits: 11.0	Credits: 7.0	Credits: 9.0
COMP 01105 INTENSIVE COLLEGE COMP I Credits: 4.0 ON-TRACK	BIOL 01104 INTRO EVOL/SCIENTIFIC INQUIRY Credits: 4.0 Minimum grade: C- ---	STAT 02280 BIOMETRY Credits: 4.0 ---	BIOL 01203 INTRODUCTION TO CELL BIOLOGY Credits: 4.0 ---	PHIL 09369 PHILOSOPHY OF SCIENCE-WI Credits: 3.0 ---	Elective - Biology Upper Level w/LAB 4 Credit upper level Biology w/LAB - refer to DW	Elective - Biology Upper Level 4 Credit upper level Biology - refer to DW
						Nonprogram

SEP Advisor Guide

3. Use the Destination drop-down menu to select **Save as PDF** or select the printer name.

The screenshot displays the SEP Advisor interface. On the left, a student's course plan is shown, organized by semester from Fall 2022 to Spring 2026. Each semester includes a list of courses with their titles, credit values, and tracking status (e.g., 'NOT TRACKED'). The right sidebar contains print settings: 'Print' (2 pages), 'Destination' (set to 'Save as PDF'), 'Pages' (All), 'Layout' (Portrait), and 'More settings'. At the bottom right of the sidebar are 'Save' and 'Cancel' buttons.

4. Select **Save** or **Print** at the bottom of the screen.

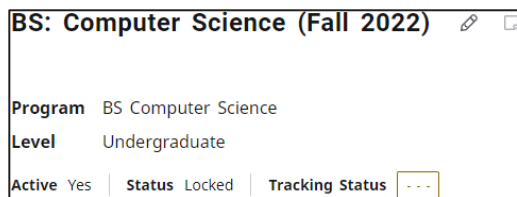
SEP TRACKING

The SEP Plan tracking feature allows users to determine if a student is meeting their goals and milestones each semester.

The plan has three levels of tracking status:

- Plan status
- Term status
- Requirement status

In order for Plan tracking and Semester tracking statuses to show, the Registrar must run the DAP58 Batch Tracking Processor in Transit at the end of each semester. Otherwise it will show as “Not Tracked” – indicated by the brown box with three dashes in it.



Requirement tracking happens automatically once the plan is locked and active.

All requirements except placeholders will show a status once the term has begun as either:

- on-track
- off-track
- warning

SEP Plan Is Off-Track

A SEP Plan consists of several semesters. In those semesters, courses are added that a student intends to take. For example: three courses were added in the Fall 2022 semester plan.

- If a student takes and successfully completes all three planned courses in a Fall 2022 semester, then all those courses will be labeled “ON-TRACK” and the Fall 2022 plan would be “ON-TRACK” as well.
- If a student takes and successfully completes only two planned courses or does not take any planned courses in the Fall 2022 semester, then those courses not taken/completed will be labeled “WARNING” and the Fall 2022 semester would be “OFF-TRACK”.
- If any two semesters are labeled as “OFF-TRACK”, the entire plan will be labeled as “OFF-TRACK”.

DEGREE AUDIT LEGEND

The Degree Works symbol legend can be found at the end of the degree audit. So, while this is presented out of order compared to the flow of the audit, it's important to understand the symbols used before going into the degree audit requirements.

Legend	
 Complete	 Not complete
 Complete except for classes in-progress	 Unmet block or requirement rule
@ Any course number	(R) Repeated class

- Complete (green circle with a checkmark)-Requirement is met.
- Not complete (open red circle)-Requirement is not met.
- Complete except for classes in-progress (half-filled blue circle)-Requirement being met with current, future, or incomplete classes.
- Unmet block or requirement rule (yellow circle with exclamation mark)-Requirement is not satisfied but there are no specific classes assigned to address it such as a GPA issue or the block containing a minimum number of credits that meets a specific criterion programmed as a block qualifier.
- Any course number (@)-Wildcard to represent any missing applicable number. For example, HST @ means any HST course. SPN 5@ means any 500 level SPN courses.
- Repeated class (R)-Found in the Audited, Failed, Dropped, Repeated sections on classes that have been excluded due to being repeated.
- While not formally found on the legend, transfer grades are indicated with a "T" in front of them. Additionally, transfer course listings include originating institution, course number, and course title.
- Additionally, at the overall block level, the "Complete" symbol is replaced by the word "Complete" in a green box, the "Complete except for classes in-progress" symbol is replaced by the word "In- Progress" in a blue box, the "Not Complete" symbol is replaced by the word "Incomplete" in a red box, and the "Unmet block or requirement rule" symbol is replaced by the words "Unmet block or requirement rule" in a yellow box.

COMPLETE

IN-PROGRESS

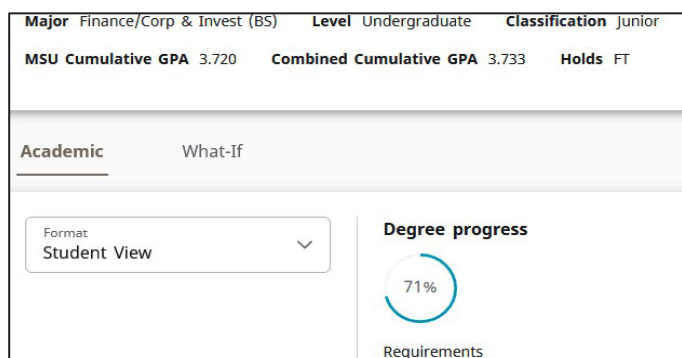
INCOMPLETE

UNMET BLOCK OR REQUIREMENT RULE

USING WHAT-IF FEATURE

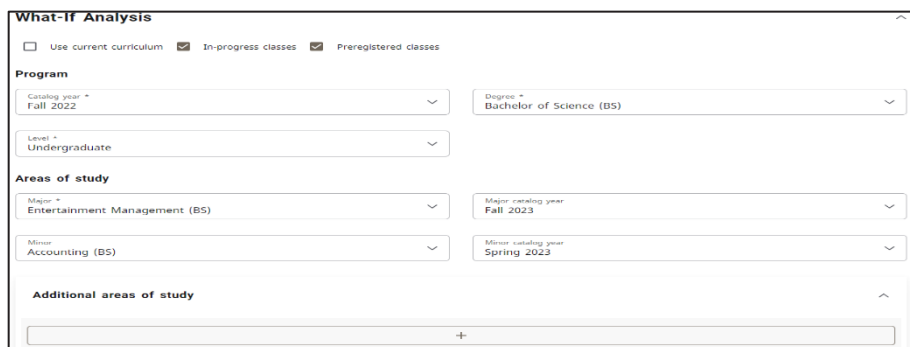
A “what-if” degree audit allows the user to see what their degree audit would look like if they were to change programs and/or catalogs prior to formally requesting the change.

Between the first and second block (below the ID block and above the format/degree progress block), there is an area where you can select the type of degree audit you want. Click on “What-If” to open the What-If Analysis selection screen.



Next, select the “Catalog year,” “Degree,” and “Level” you wish to use in the what-if audit. The catalog year will default to the current semester. You will want to select the appropriate level so it knows whether to apply your undergraduate or graduate courses. In the “Areas of Study” section, select the first majors and first minor (if applicable) you wish to pursue. The major (includes certificates as well) selection menu is filtered based on the degree selected. The minor selection menu is not filtered. Users should only select minors available in the same degree type as the degree selected. Each minor lists the corresponding degree information in parentheses behind the minor title.

You will also be prompted to select the major catalog year and minor catalog year. If this is a new major or minor you are pursuing, you would want to select the current semester (or the semester you plan to begin pursuing it if that is in a future semester). If it’s an existing major or minor, you would want to select the catalog term you are currently pursuing for that major or minor, which can be found in the block header for that major or minor back on your regular degree audit.



Additional majors and minors may be selected in the Additional Areas of Study section. First, click the down arrow at the end of the Additional Areas of Study row. This will make a button with a plus sign available. Click it and an additional major and minor field will appear. You can select an additional minor and/or additional major. Major will be filtered by the degree type selected for the what-if audit and minor will not be filtered, like the opening section of the what-if audit. Click the add button to add your selection. Additional majors and/or minors may be added by clicking the plus button and repeating the above process.

There is also the ability to add courses to the audit that you are thinking about taking in the future to see where they would fit. You can do this in the “Future Classes” section. You add the subject and number, and then click “Add.” This causes the what-if audit to show the courses as “Planned” in the degree audit so that users are able to see the requirements that they fulfill.

You can also use the Future Classes option with the regular audit. To do this, check the “Use Current Curriculum” box at the top of the What-If Analysis box. It is unchecked by default. This enables the what-if audit to use the student’s currently declared majors and/or minors in the what-if audit, while also allowing the user to utilize the Future Classes feature with it through the what-if audit.

There are also checkboxes that are checked by default to indicate whether you wish to include in-progress (current semester) classes and pre-registered (future semester) classes. You typically will wish to leave them checked. They are located at the top of the What-If Analysis box. When finished, click the “Process” button to review the what-if degree audit.

The screenshot shows a web interface with two main sections. The top section, titled "Additional areas of study", contains four dropdown menus: "Major", "Major catalog year", "Minor", and "Minor catalog year". Below these are "CANCEL" and "ADD" buttons. A plus sign (+) is visible below the "ADD" button. The bottom section, titled "Future classes", contains two text input fields: "Subject" and "Number", followed by an "ADD" button. At the bottom right of the interface are "RESET" and "PROCESS" buttons.

Disclaimer

Disclaimer: This is a plan to help you map your journey to degree completion. It is a supplemental guide to your conversations with your advisor. Refer to the Student Educational Planner tutorial for additional help interpreting your plan. This Plan is not your academic transcript, and it is not official notification of completion of program requirements.

For additional information on how to use this plan and degree requirements, contact your advisor or the Office of the Registrar using degreeworks@mssu.edu.