

# Creating an Academic Plan for Students in Academic Planner

**Intro:** This workflow guide explains how an advisor creates an Academic Plan for one of their students using the Next Generation Academic Planner.

## Start Creating an Academic Plan

Select a student from the Assigned Students list or search for a student in the quick search bar at the top of the Navigate home page to open a Student Profile.

### Assigned Students

Term: Spring 2023 (Default T... ▾)

Actions ▾	
<input type="checkbox"/>	STUDENT NAME

To start creating an Academic Plan for the student, select the **Academic Plan** tab from the Student Profile menu

## Emily Hartke

Overview Success Progress History Courses Path **Academic Plan** More ▾

Shared Workspace opened on the **Search** page in Edit mode.

**Planning Tools** ⓘ

Create Plan for Emily

- Create New Plan
- Use Emily's Current Plan**
- Use Sent Plan

Select **Use NAME Current Plan** from the dropdown menu. You may also choose to work in current or sent plan.

Add a Draft Plan Name in the dialog that opens. Click **Continue** to start creating the plan.

### Create Draft Plan Name

Before you start suggesting courses, would you like to create a name for your draft plan?  
You can change the draft name at any time before you send it.

\* Create Plan Name

Continue

## Building a Draft Plan

The Shared Workspace is now editable. There are several actions you can take. Let's begin with adding a template.

## Adding a Template

Select the **Add Templates** link. The center panel of Shared Workspace now displays the **Add Additional Templates** page. A list of new templates with catalog years is on this page. If a template matches a student's academic goals (ex: major, program, minor, concentration) and catalog year, it will be indicated as Recommended with a green, filled star in the Recommended column. Choose one for the student by selecting the **Add to My Templates** button for the template.

**Planning Tools**

Create Plan for Emily

Emily's Current Plan

Emily's Current Plan  
by Emily Hartke  
On: October 19, 2022 10:59 AM

Template Library

+ Add Templates

Viewing Templates for Draft Plan:  
Accounting Degree Jan 30, 2023

view Selected Templates

AAS.ACC Accounting

### Add Additional Templates

Select templates from the All Templates list to add to "Your Templates". You can add or remove any template from "Your Templates". Templates recommended to you will be indicated with a star icon.

Template Search (by keyword)

TEMPLATE	CATALOG YEAR	RECOMMENDED	ACTIONS
AAS.ACC Accounting	2022 - 2024	☆	+ Add to My Templates
CRT.ACC Accounting	2022 - 2024	☆	+ Add to My Templates

K < 1 > X

The template then appears in the left column under **Student Plan Templates**. Select **View Selected Template** to view the program requirements in the middle column. Here you can choose to show matched courses by toggling **Show Matched Column**. You can also choose to add multiple courses to a plan at once by toggling **Bulk Add to Term**.

## Show and Add Terms

Next, begin to build the draft plan with terms in the right-hand column. To show terms that a student has completed, select **Show Completed Terms** from the Draft Plans hamburger menu.

To add a new term, click the **Add a Term** button and choose a term from the dropdown.

You can then add more terms by repeating these actions. Once finished, you can add courses from the template or by using enhanced search.

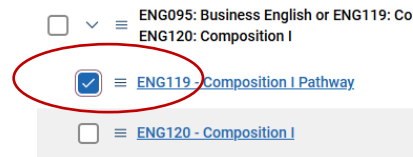
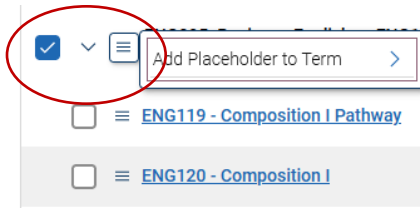
## Adding Courses from Template

You can use the program template to create an Academic Plan. The template details appear after you select the name of a template. (or after clicking **Back to Planning** on the Search for Courses page. The Matched columns indicates courses that are already on a student's plan because they have either planned, registered for, or completed the course.

## Bulk Add to Template

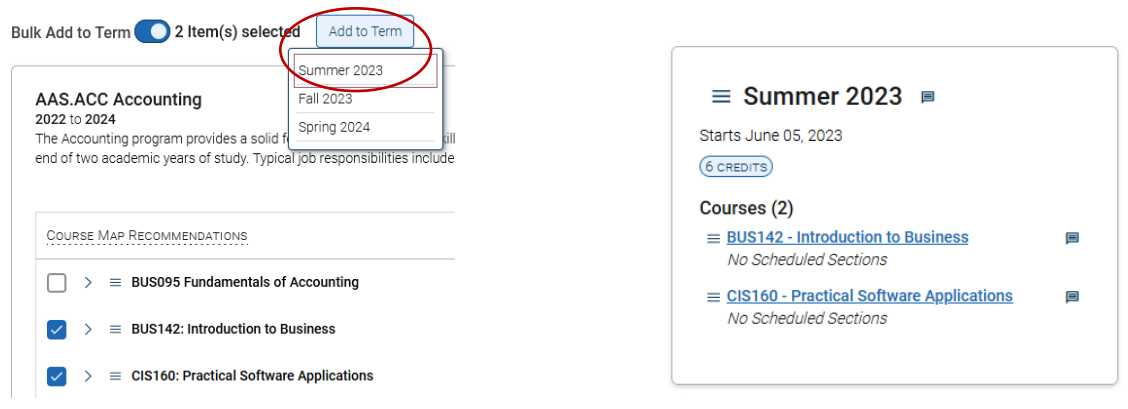
To assign multiple courses to an Academic Plan at once, turn on the **Bulk Add to Term** toggle.

To assign courses to a term, select the checkbox in front of the courses and/or placeholders that should be added to the term. Placeholders show a recommendation title, e.g. *Composition I*. Expand the placeholder recommendation by clicking the button in front of the placeholder to reveal the course(s) within that recommendation. You can add the placeholder or a specific course in the placeholder group.



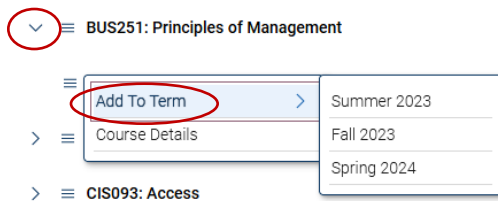
An actual course will show the title of the course and a course number and have a clickable link.

After selecting the courses and placeholders to add to the term, click the **Add to Term** button and select the term you want to assign them to. If you select a placeholder, the student must select the actual course section to schedule and register for. This reminder appears in the Academic Plan.



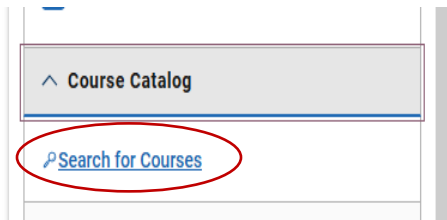
Advisors can also add courses to the Academic Plan from the template individually when **Bulk Add to Term** is toggled off.

Add an actual course by expanding a recommendation using the button and then clicking the menu and select *Add to Term* from the dropdown, followed by selecting the term.



## Search For and Add Courses

Advisors can also search for and add courses to the Academic Plan not included in the template. The link is located in the Planning Tools menu under the **Course Catalog** tab on the left of Shared Workspace.



The **Search Courses** page opens in the center panel.

Use the filters to find courses and then click **Search**. Results will then show.

To add one or more courses to the plan, select the checkbox in front of the courses and choose a term from the dropdown at the top of the results. Then select **Add to Term**.

## Search Courses

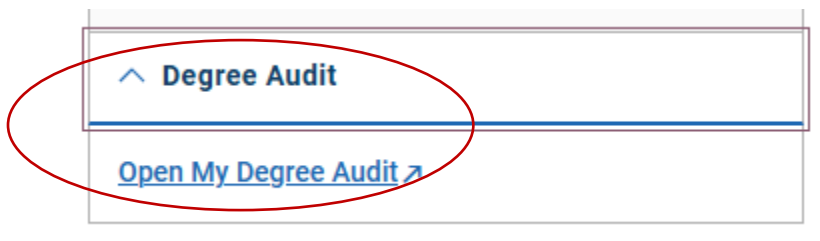
A screenshot of the 'Search Courses' interface. On the left, there are several filter sections: 'Search by Keyword' with a text input field containing 'Enter a keyword or phrase'; 'Course Code' with a dropdown menu showing 'MAT125'; 'Subject' with a dropdown menu showing 'Choose subject(s)'; 'Department' with a dropdown menu showing 'Choose department(s)'; 'Credits' with 'from' and 'to' input fields; and 'Course Level' with a dropdown menu showing 'Choose course level'. At the bottom of the filters are 'Search' and 'Clear' buttons, with 'Search' circled in red. On the right, there is a results section. It shows '1 results found' and 'None selected'. Below this is a table with one row: a checkbox (circled in red), 'CODE', 'MAT125', and 'Statistics'. To the right of the table is a dropdown menu for 'Choose a term' with options 'Summer 2023', 'Fall 2023', and 'Spring 2024'. An 'Add to Term' button is also visible, circled in red. At the bottom right, there are navigation arrows and a page number '1'.

Courses then appear in the **My Academic Plan** panel. Repeat these actions to add more courses to the Academic Plan.

To return to the program template, do NOT use the browser Back function. Instead, go back to the Planning Tools, open Template Library and then select View Selected Template.

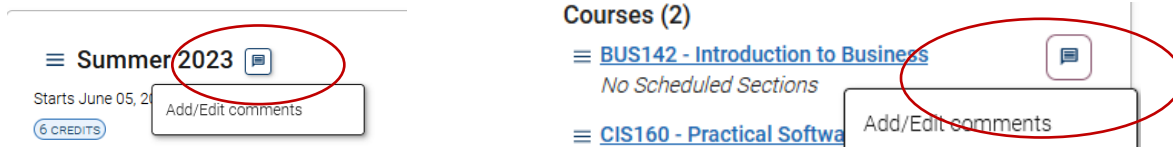
## Degree Audit

You can access a student's degree audit from the Degree Audit tab at the bottom of the left-side panel. Click on **Open My Degree Audit** to be directed to Self-Service where you will be able to search for and select the student and run a Progress report.



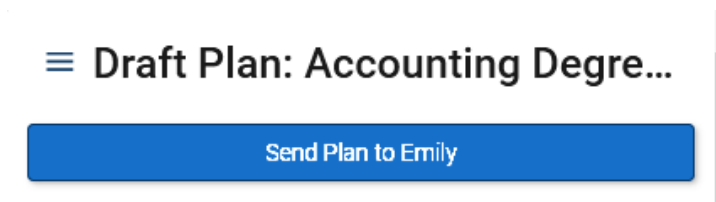
## Adding Comments to the Plan

You can add notes or comments to a semester or course if there is additional information to share with the student.



## Sending a Draft Plan to the Student

Once finished adding items to the Academic Plan, you can send a draft of the plan to the student. Do this by clicking the **Send Plan to/Send Suggestions** button.



When you click the button, a **Send Suggestions to Student** dialog opens. You can change the title of the draft plan and add overall comments and suggestions to it.

A screenshot of the 'Send Suggestions to Student' dialog box. The title is 'Send Suggestions to Student'. Below the title, there is a note: 'Student and other advisors will see this plan under Advisor Plans menu option. Once student has viewed the plan, it will be acknowledged.' There is a field for '\*Plan Title' with the text 'Accounting Degree Jan 30, 2023'. Below that is a large text area labeled 'Add Overall Comments or Suggestions to Plan'. At the bottom, there are two buttons: 'Send' and 'Clear'.

Click **Send** to send the plan to the student.

## Next Steps

The next time that the student logs into Navigate, they see the advisor's recommended plan on the left panel of their Academic Planner. If they have opted in to notifications about Academic Planning within Navigate Student, they will also receive notifications through their preferred notification method(s). Clicking on the Advisor Plan shows the plan to the student so they can use it to inform their academic planning.