

Creating Academic Plans for Enrollment

In this guide, the following topics will be covered:

- A. Plans: General Information
- B. Approving a Plan
- C. Editing/Deleting a Plan
- D. Creating a Plan

A. Plans: General Information

All personas except the Registrar persona can create plans. Plans allow the user to pre-build plans that include multiple courses and class sections. The user can register directly from a plan with only one click. Plans do not guarantee that the student will be successfully enrolled into the selected courses and sections.

When a user selects a course from the search results, they can add it to the plan at the course level, or view individual sections associated with the course and add the CRN. A plan can have a mix of courses and sections. No restriction checking occurs at this point. Restriction checking occurs when the user enrolls in classes and they add classes to the registration summary from a plan.

Faculty and advisors cannot mark any plan created by a student as preferred.

All plans created for students or by students are displayed in the **Select a Plan** page. When plans are displayed that were not created by the login ID user, the name of the plan creator and the associated persona are displayed:

The screenshot shows the 'Select A Plan' interface. It is divided into three sections:

- Plans you have created for this term: 2** (Term: 2020 Fall (AY 2021), maximum of 3 plans):

Title	Details	Hours	CRN
Colonial Latin America	HIST 0474_01	3	8374
The Chart Practicum	COMM 0220_01	1	8182
Video Production	COMM 0201	3	
Total Planned Hours: 7			
- Plan: Art & Theatre** (Created by: You, Make Preferred):

Title	Details	Hours	CRN
Revolving Fibers	ART 0200	3	
Senior Project II	TH 0490	1	
Total Planned Hours: 4			
- Plan: Advisor Created Plan** (Created by: Wood, Elisabeth (Advisor)):

Title	Details	Hours	CRN
Art Appreciation	ART 0110	3	
United States History 1492-1877	HIST 0110	3	
Total Planned Hours: 6			

B. Approving a Plan

Faculty members and advisors can approve any plans created by the student or plans created for the student that they themselves created. Note: students are not required to register from an approved plan. When an approved plan or plans exist, the student can still register from any other plan.

Click the **Approve This Plan** link:

Select A Plan

Plans you have created for this term: 1
Term: 2021 Spring (AY 2021)
You are allowed a maximum of 3 plans for this term.

Create a New Plan

Plan: My Plan | Created by: Student | Testing (Student) | Preferred | [Approve This Plan](#)

Note	Title	Details	Hours	CRN
	Internship in Marketing	MRKT 0491, 01	1	2015
	The University Experience	UE 0100, 06	1	2373
	Fundamentals of Physical Science	PHYS 0120, 50	3	1552

Total Planned Hours: 5

The name of the user approving the plan and the persona will be displayed:

Select A Plan

Plans you have created for this term: 1
Term: 2021 Spring (AY 2021)
You are allowed a maximum of 3 plans for this term.

Create a New Plan

Plan: My Plan | Created by: Student | Testing (Student) | Preferred (Approved - [April M Martin - Advisor](#)) | [Remove Approval](#)

Note	Title	Details	Hours	CRN
	Internship in Marketing	MRKT 0491, 01	1	2015
	The University Experience	UE 0100, 06	1	2373
	Fundamentals of Physical Science	PHYS 0120, 50	3	1552

Total Planned Hours: 5

Approval may be removed by clicking the **Remove Approval** link:

Select A Plan

Plans you have created for this term: 1
Term: 2021 Spring (AY 2021)
You are allowed a maximum of 3 plans for this term.

Create a New Plan

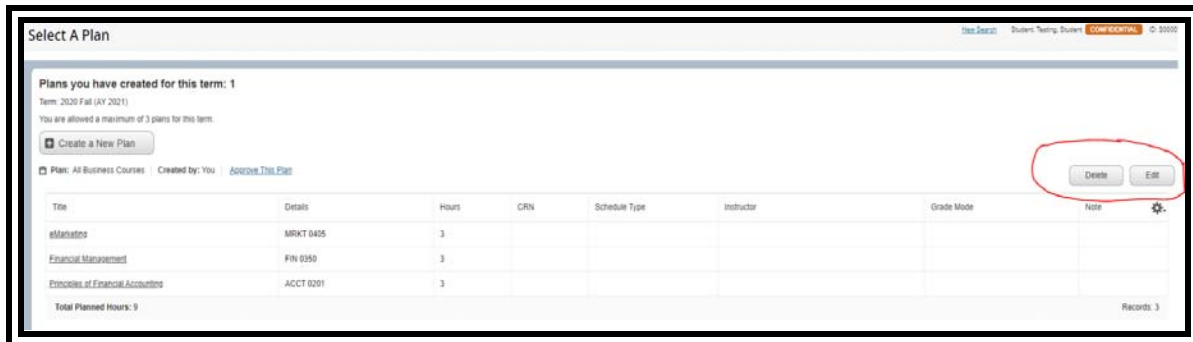
Plan: My Plan | Created by: Student | Testing (Student) | Preferred (Approved - [April M Martin - Advisor](#)) | [Remove Approval](#)

Note	Title	Details	Hours
	Internship in Marketing	MRKT 0491, 01	1
	The University Experience	UE 0100, 06	1
	Fundamentals of Physical Science	PHYS 0120, 50	3

Total Planned Hours: 5

C. Editing/Deleting a Plan

Faculty members or advisors can edit or delete plans they had previously created for students:

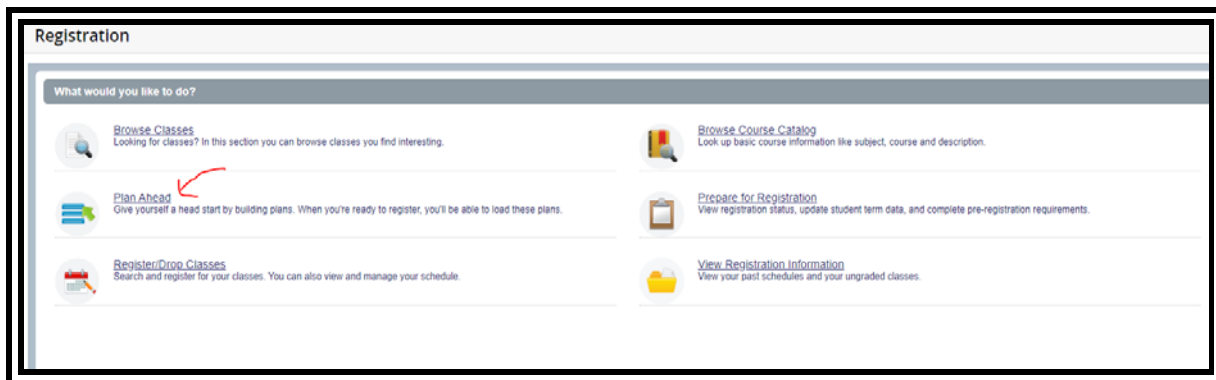


No plans can be deleted or edited that were not created by the login ID user.

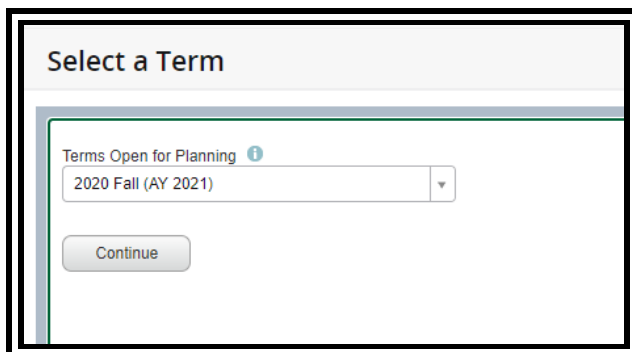
Students may edit or delete plans that they created, including plans that an advisor has approved.

D. Creating a Plan

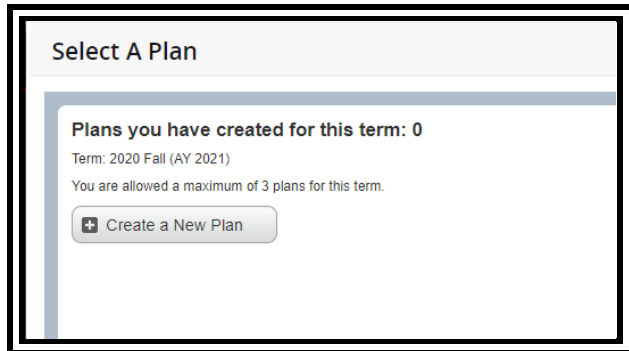
To create plans, click on **Plan Ahead**:



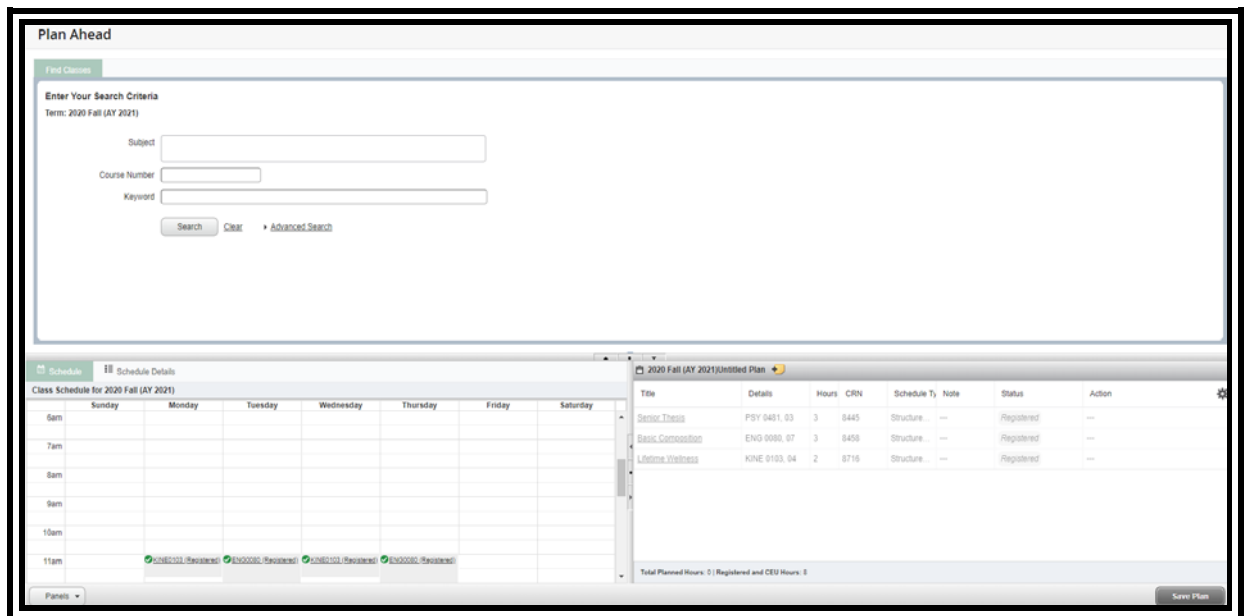
Select a term from the drop-down menu and click **Continue**:



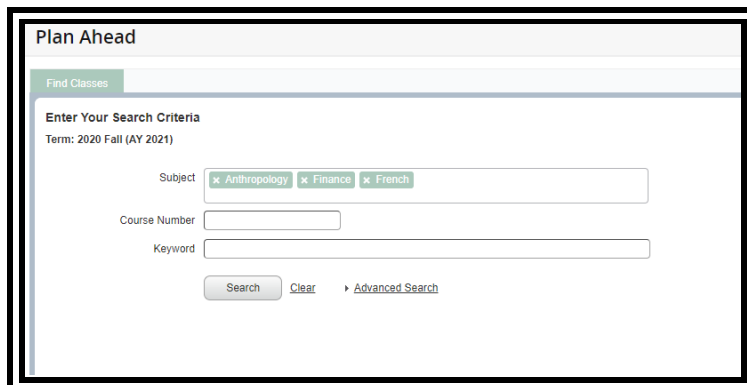
To create a new plan, click the **Create a New Plan** button:



The following screen will be displayed. Any courses the student has already enrolled in will be shown at the bottom of the screen:



Enter class information in the **Search Criteria** section to look for classes and click the **Search** button:



Search results are displayed:

Title	Subject Description	Course Number	Hours	Description	
General Anthropology	Anthropology	0101	3	This course will introduce students to t...	View Sections Add Course
Physical Anthropology and Archaeology	Anthropology	0155	3	An introduction to physical (biological)...	NOT OFFERED FOR TERM
Topics in Anthropology	Anthropology	0298	3	Special Anthropology topics of current...	NOT OFFERED FOR TERM
North American Indians	Anthropology	0302	3	Ethnographic survey of the indigenous...	NOT OFFERED FOR TERM
Man, Ritual, and Religion	Anthropology	0304	3	This course will examine early anthro...	NOT OFFERED FOR TERM
Comparative Cultures	Anthropology	0342	3	A comparative study of human society...	NOT OFFERED FOR TERM
Globalization & Native Peoples	Anthropology	0379	3	Globalization and Native Peoples focu...	NOT OFFERED FOR TERM
Language & Culture	Anthropology	0385	3	Exploration of the relationship betwe...	View Sections Add Course

Users have the option to add a course to the plan at the course level or to view the sections available for the course. If there are no sections available for the term, a **Not Offered for Term** message will be displayed.

Subject	Course Number	Title	Subject Description	Hours	Description	
ART	0101	Two Dimensional Design	Art	3	Foundation studio course that intro...	View Sections Add Course
ART	0103	Three Dimensional Design	Art	3	Foundation studio course introduc...	View Sections Add Course
ART	0110	Art Appreciation	Art	3	Intended for the non-art major, this...	NOT OFFERED FOR TERM
ART	0130	Basic Drawing	Art	3	Development of perceptual and str...	View Sections Add Course
ART	0140	Basic Digital Photography and Image Editing	Art	3	Introduction to digital photography...	View Sections Add Course
ART	0200	Beginning Fibers	Art	3	Beginning studio course exploring t...	NOT OFFERED FOR TERM
ART	0205	Beginning Jewelry Design/Metalsmithing	Art	3	Creative exploration of design, bas...	View Sections Add Course

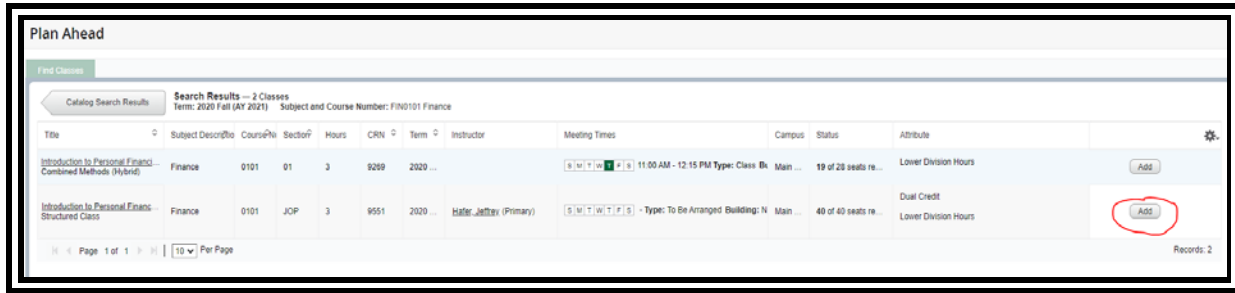
Click the **Add Course** button to add the course to the plan:

Language & Culture	Anthropology	0385	3	Exploration of the relationship betwe...	View Sections Add Course
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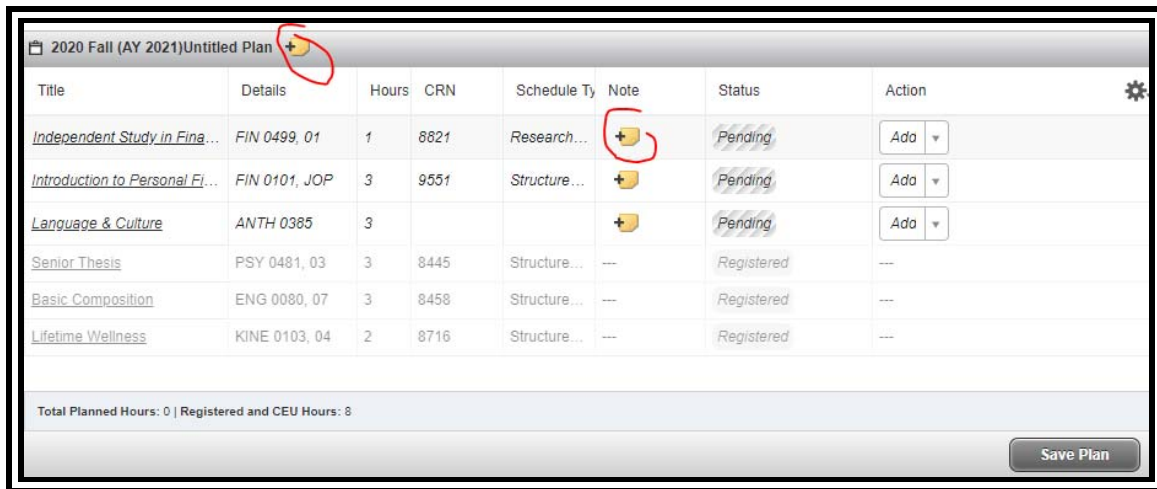
The course will show at the bottom of the screen with a pending status:

Title	Details	Hours	CRN	Schedule T	Note	Status	Action
Language & Culture	ANTH 0385	3				Pending	Add
Speech Theory	PSY 0481, 02	3	0445	Structure...		Registered	
Basic Composition	ENG 0000, 07	3	0450	Structure...		Registered	
Lifetime Wellness	KINE 0153, 04	2	0716	Structure...		Registered	

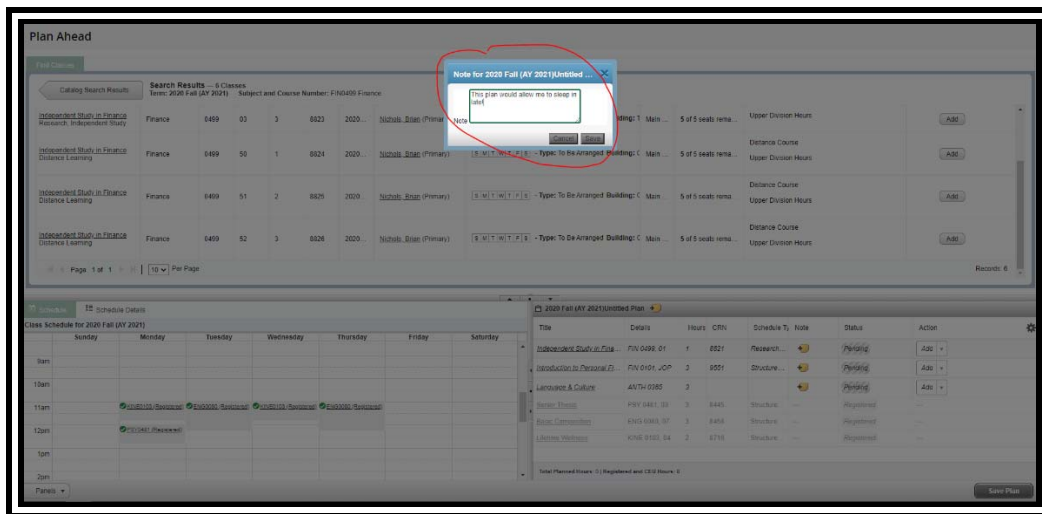
Return to search results to add more classes:



Once all desired classes have been selected, finish creating the plan. Note: notes can be created for the plan and/or for individual courses in the plan. Clicking on the note icon will open a pop up box for notes to be entered:



Type the note and click the “save” button:



When all notes have been entered and all classes have been added, click the **Save Plan** button:

The screenshot shows the 'Plan Ahead' interface for the 2020 Fall (AY 2021) term. It features a table with the following columns: Title, Details, Hours, CRN, Schedule Ty, Note, Status, and Action. The table contains six rows of class information:

Title	Details	Hours	CRN	Schedule Ty	Note	Status	Action
Independent Study in Fin...	FIN 0499, 01	1	8821	Research...	+	Pending	Ada ▾
Introduction to Personal Fi...	FIN 0101, JOP	3	9551	Structure...	+	Pending	Ada ▾
Language & Culture	ANTH 0385	3			+	Pending	Ada ▾
Senior Thesis	PSY 0481, 03	3	8445	Structure...	---	Registered	---
Basic Composition	ENG 0080, 07	3	8458	Structure...	---	Registered	---
Lifetime Wellness	KINE 0103, 04	2	8716	Structure...	---	Registered	---

At the bottom of the interface, a summary bar displays: Total Planned Hours: 0 | Registered and CEU Hours: 8. A red circle highlights the 'Save Plan' button in the bottom right corner.

A pop up box will appear. Enter the name of the plan and click **Save**. If the user does not enter a name for the plan before clicking save, a name is automatically assigned (such as Class Schedule for Registration Fall 202080). Plans may be edited after they have been saved.

The screenshot shows the 'Plan Ahead' interface with a 'Name Your Plan' pop-up box. The pop-up box has a text input field containing 'Sleep IT' and two buttons: 'Save' and 'Cancel'. The background interface shows a search results table for 'Independent Study in Finance' and a class schedule grid for the 2020 Fall (AY 2021) term. The class schedule grid is organized by day of the week (Sunday through Saturday) and shows the following classes:

Day	Class
Mon	
Tue	
Wed	
Thu	
Fri	
Sat	

The 'Save Plan' button in the pop-up box is circled in red.

The plan will be shown at the bottom of the screen with a **Planned** status:

Title	Details	Hours	CRN	Schedule T	Note	Status	Action
Independent Study in Finance	FIN 0499_01	1	8821	Research		Planned	None
Introduction to Personal Financial Planning	FIN 0101_JOP	3	9551	Structure		Planned	None
Language & Culture	ANTH 0385	3				Planned	None

To add more plans, click on **Select a Plan** at the top of the screen:

Title	Subject Descr	Course#	Sectof	Hours	CRN	Term	Instructor	Meeting Times	Campus	Status	Attribute
GENERAL ANTHROPOLOGY Structured Class	Anthropology	0101	01	3	8548	2020	Guest, Jill (Primary)	01:00 PM - 02:15 PM Type: Class B	Main	24 of 25 seats re.	CORE 42 Social & Behavioral GER Area E2 Lower Division Hours MOTR ANTH 101 CORE 43 Social & Behavioral

The following screen will be displayed. The number of existing plans will be shown and a list of courses that make up each plan will be shown:

Title	Details	Hours	CRN	Schedule Type	Instructor	Grade Mode	Note
Independent Study in Finance	FIN 0499_01	1	8821	Research, Independent Study	Nichols, Brian (Primary)	Credit/No Credit	
Introduction to Personal Financial Planning	FIN 0101_JOP	3	9551	Structured Class	Haber, Jeffrey (Primary)	Standard Letter	
Language & Culture	ANTH 0385	3					

Total Planned Hours: 7 Records: 3

Repeat the process to create more plans if desired. Plans are limited to a maximum of three per term.