How to Create a Plan for Completing Your Degree

The degree audit system is not available to graduate students and non-matriculated undergraduate students.

Besides creating a degree audit to see what requirements you will need to complete in order to graduate, you can use the same degree audit system to create a Plan containing the specific courses you will need to take each term in order to graduate. This will make it easy for you to determine what courses to choose each semester.

This document provides instructions for creating and managing plans and comments. If you have not yet created a degree audit, follow the instructions on the WISER Help for Students page.

To access the degree audit system:

- In your web browser, navigate to the WISER home page, [http://wiser.umb.edu](http://wiser.umb.edu)
- Log into WISER using your campus email user ID and password.
- On your Student Center page, click on the Boston Degree Audit icon.

**Boston Degree Audit**

- The **UMass Boston Degree Audit Services** sign-in page will appear.
Login

- Enter your campus email user ID (the part before the @) and your campus email password.
- Click on Login.
- The Request an Audit page will appear, displaying your current major.

Create a New Plan

Click on the Plans tab at the top.

Any existing plans and comments you or your advisor have already created will appear.

To create a new plan, click Create a New Plan. A list of degree programs will appear.

Select your degree program. One or more “roadmaps,” indicated by this icon 🗺️, may appear.

SELECT INTERNATIONAL RELATIONS - BA
  🗺️ INTERNATIONAL RELATIONS - BA, effective: Fall 2017, for 4 Years

Click on the roadmap you wish to use.

Plan Name: Enter a name, such as “Anthropology Plan.” The Plan name will be visible to your advisors.

Term and Year: Enter the term and year you will begin following the Plan.

Years to Graduation: Leave the default set at 4. You may change this number in the Plan.

Click Add Plan.

The Plan will now appear, with any others that may have been created for or by you.
Click on the **Plan name** in the Edit Plan column to open it in the Plan Builder page. On the left you will see the Roadmap you selected containing the requirements you must complete. On the right you will see your Plan, which you will now fill with courses.

Your goal is to create a list of courses in each term in the Plan on the right that will enable you to fulfill your degree requirements and graduate in the number of semesters you have chosen.

**Recommended procedure:**

1. Click the **Move Preferred** icon at the top of the Roadmap. This will cause any required courses (where you do not have a choice of courses, but must take the one listed) to move automatically to the Plan on the right. A green checkmark will appear next to these requirements in the Roadmap.

2. Go back to Year 1-Term 1 in the Roadmap and look for any requirement that does not have a green checkmark and follow the steps below to continue populating the Plan, term by term.

To specify the remaining courses or requirements in the Plan, you may do the following:

**Step 1:** Click or tap the arrow next to a requirement to expand it. Click or tap a course to view more details about that course.
If you click on a distribution requirement, such as “Arts” or “Humanities,” you will go to the Course Wizard, where you may select a term and view the course offerings that will fulfill the requirement. Make a note of the course you want to take. Be aware that, unlike the course schedule in WISER, the Course Wizard is not updated in real time, so the number of available seats for the current or next term may not be accurate.

**Step 2:** Add the course from the Roadmap into the appropriate Term on the Plan. In some cases you may be able to **drag and drop** a course from the Roadmap into the Term on the Plan. TO do this you can drag the requirement over to the term title which will highlight in a blue box. In other instances, such as when multiple courses will fill a requirement, you will need to manually add the course.

- Click on the **term** in the **Plan**.
- Click on **Add Course**.
- Enter the **Department Abbreviation**, which must be in upper case and is the same as the Subject Code in the WISER Schedule of Classes.
- Enter the **Course Number**.
- Click **OK**. The course will be listed in the Plan.
Step 3: Use the “check” Plan button at the top of the Plan (✓) to check the Plan against your degree audit to ensure that requirements are being fulfilled.

As courses are moved from the Roadmap to the Plan, a green checkmark will appear in the Roadmap, indicating that you have fulfilled the requirement already or you have a planned course that will fulfill the requirement.

For general electives, no green checkmark will appear.

Add a Message
If you are not adding a specific course to the plan (i.e. general education course categories), you may click the Add Message button in a Term in the Plan and choose a message from the list to be added as a note or placeholder in that Term.

Add Message to Term
Select one of the following messages to add to your plan:
- Take a 3 credit International Diversity Course.
- Take a 3 credit United States Diversity course.
- Take an Intermediate Seminar.
- Take a 3 credit SB course.
- Take a First Year Seminar.
- Take a 3 credit ART course.
- Take a 3 credit HU course.
- Take a 3 credit MT course.
- Take a 3 credit NS course.
- Take a three credit WC course.
- Take a 3 credit WL course.
- Take a 3 credit general elective.
- Take two general elective courses.

Edit the Plan

Add a Term: Click the + at the top of the Plan. In the Add Term box, select a Term and Year and click OK.
Delete a Term: Click the trashcan icon to the right of the term, then click Yes.

Remove a Course: Click the Edit icon to the right of the term.

Select the course(s) to be removed and click Delete.

Click or tap submit to save changes.
Print Roadmap or Plan

To print the Roadmap or Plan, click the appropriate PDF button.

View Updated Degree Audit

To view a degree audit containing the courses in the Plan, click the audit button above the Plan. The audit will appear in a new tab in your web browser.

Manage Existing Plans

You may have multiple Plans in the system. All of your Plans will be listed when you click on the Plans tab.

To open and edit a Plan, click on the Plan Name.

The Select an Action dropdown will allow you to edit, rename, copy or, in some cases, delete the plan.
Preferred Plan

One plan must be chosen as the **Preferred Plan**. If only one plan exists, it will be the preferred plan by default.

The preferred plan will be marked with a **solid star** icon on the **Manage Student Plans** page and can be changed by the student or an advisor.

![Preferred Plan Table]

The preferred plan should be the one that you intend to follow. Marking a plan as preferred enables the use of Plan Approvals as well as the Schedule Builder.

**Changing the Preferred Plan**

**Step 1.** In the Manage My Plans page, find the list of plans.
Step 2. If you wish to make a different plan preferred, click the open star icon next to the plan.

Step 3. The star icon for the plan you chose will change from open to solid.

**IMPORTANT:** Only one plan can be the preferred plan. If an entire plan is approved by an advisor, it will be locked-in as the preferred plan until the approval is removed.

**Plan Comments**

Comments can be attached to plans which may serve as notes regarding the plan. Since advisors are not notified that a comment has been created for them, students should not rely on comments as a means of communication with their advisor. You should contact your advisor directly with any questions about a plan.

As a student you can make comments visible only to yourself or to all advisors.

Comments are created from within a plan and are viewable from within the plan and on the Manage My Plans page.
Comments will display minimized by default. To expand a comment, click **Expand All** or the + icon next to the comment.

**Creating a Comment**

**Step 1.** Open a plan from the Manage My Plans page

**Step 2.** Open the comments section by clicking the **Comments** icon.

**Step 3.** Click the **Add New Comment** button.
Step 4. Select if you want to the comment to be private to yourself or visible to advisors.

Step 5. Enter the text of your comment in the space provided and click Save.

**NOTE:** Comments marked private can be viewed by system administrators. All comments become part of your educational record.

Step 6. Your saved comment will appear below and in the Manage My Plans page.

Step 7. You can **Reply**, **Edit**, and **Delete** any comment you have created using the icons at the bottom right of each comment.

Plan Approval

The **Preferred Plan** can be approved by an advisor which will mark the plan as reviewed and lock it to any further editing unless a **Remove Approval Request** is sent.

Plans can be approved at the semester level, which is the preferred method, or the entire plan can be approved.

**NOTE:** If you request approval for an entire plan, the plan will be locked to any further editing or updating and no other plans can be chosen as the preferred plan.
Requesting Approval

Step 1. Open a plan from the Manage My Plans page.

Step 2. In the plan, expand the semester you wish to seek approval for. Usually this will be the upcoming semester.

Step 3. Click the Request Term Approval button for the term.

Step 4. A confirmation message will pop up. Click Yes to proceed.
Step 5. An acknowledgement message will pop up. Click OK to continue.

Step 6. Contact your advisor to let them know you have requested an approval for a plan. They will either accept or reject the approval.

Step 7. Once the semester is approved, it will be marked APPROVED and cannot be edited or deleted.

Requesting to Remove Approval

Step 1. Open the plan you wish to have unapproved.

Step 2. Expand the approved term.
Step 3. Click the **Request Remove Term Approval** button for the semester.

Step 4. A confirmation message will pop up. Click **Yes** to proceed.

Step 5. An acknowledgement message will pop up. Click **OK to continue**.

Step 6. Contact your advisor to let them know you have requested that an approval be removed. They will either accept or reject the request.

Step 7. Once the request is approved, the **APPROVED** message will disappear and the semester can be edited or deleted again.