How to Create a Plan for a Student in uAchieve

The uAchieve degree audit system allows both students and staff members to:
- Run a degree audit based on either the student’s current major or a new major the student is considering.
- Create a Plan for completing degree requirements by choosing the appropriate courses to take in each semester.
- Enter, view and share comments relating to the student’s Plan.

This document provides instructions for creating and managing Plans and comments.

Select the Student
Starting at the student’s Student Services Center in WISER, log into the degree audit system using your campus email user ID and password.

The home page will appear.

Click on the Students icon.

On the Student Search page, enter the student’s ID number and click Submit.

The Request an Audit page will appear.

Click on the Plans tab at the top.

Any existing plans and comments for this student will appear.
Create a New Plan
To create a new plan, click Create a New Plan. A dropdown list of degree programs will appear.

Select the student’s major. One or more “Roadmaps,” indicated by this icon ☐, may appear.

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 “Mary Student’s International Mgt Plan.” The Plan name will be visible to the student and to other advisors.

Term and Year: Enter the current or future term and year the student will begin following the plan.

Years to Graduation: Leave this set to 4. If necessary, the number of years can be changed inside the Plan.

Click Add Plan.

The Plan Builder page will open and the Plan will be listed, with any others that may have been created for or by the student.

Click on the Plan name to open it in the Plan Builder page. On the left you will see the Roadmap and on the right you will see the student’s Plan.
Recommended procedure:

1. Click the Move Preferred icon at the top of the Roadmap. This will cause any required courses (where the student does not have a choice of courses) 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 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 the student wants 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 by dragging it to the term title which will be highlighted with a blue box. In other instances, such as when multiple courses will fill a requirement, you will need to manually add the course in this way:

- 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 the 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 the student either has fulfilled the requirement already or has 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. a general education course category), 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.
**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.

![Add Term](image)

**Delete a Term:** Click the trashcan icon to the right of the term and then click Yes.

![Delete Term](image)

**Remove a Course:** Click the Edit icon to the right of the term. Select the course(s) to be removed and click Delete.

![Remove Course](image)

Click or tap submit to save any 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

A student may have multiple Plans in the system. All of the student’s Plans will be listed when you click on the Plans tab in the student’s record.

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.

The preferred plan should be the one that the student intends 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 Student 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.

<table>
<thead>
<tr>
<th>Preferred</th>
<th>Edit Plan</th>
<th>Action</th>
<th>Updated</th>
<th>User</th>
<th>PDF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Biology Test</td>
<td>Select...</td>
<td>Oct 16, 2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CJ Plan</td>
<td>Select...</td>
<td>Oct 10, 2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>LABOR-BA Plan</td>
<td>Select...</td>
<td>Oct 10, 2017</td>
<td></td>
<td></td>
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</tbody>
</table>

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

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</table>

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 students are not notified that a comment has been created for them, advisors should not rely on comments as a means of communication with the student.

As an advisor, comments can be made visible to the student and all advisors or just to advisors. All advisors will be able to see comments made on a student’s record by advisors.

NOTE: Although they will not be displayed in uAchieve, a student can request a copy of any comments made on their record to advisors only.

Comments are created from within a plan and are viewable from within the plan and on the Manage Student 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 Student 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 the comment to be visible to the student and advisors or advisors only.

![Share options](image)

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

**Step 6.** Your saved comment will appear below and in the Manage Student 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.

![Icons](image)

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**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 approval is removed.

Students cannot approve plans on their own, but they can request an approval from an advisor who can either accept or deny requests. Students are advised to contact their advisor when they have requested an approval.

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

**NOTE:** Approving an entire plan will lock the plan to any further editing or updating and prevent any other plans from being selected as the preferred plan.

**Approvals**

**Step 1.** Open a plan from the Manage Student Plans page.
Step 2. In the plan, expand the semester you wish to approve.

Step 3. Approvals are controlled by the lock icons located under the edit and delete icons for each semester.

Step 4. When the open lock icon is highlighted (as above), the semester is not approved and it can be edited or deleted.
Step 5. When the **closed lock** icon is highlighted, the semester is approved and cannot be modified. The semester will also have **APPROVED** displayed next to it.

Step 6. An entire plan can be approved by clicking the **closed lock** icon at the top of the plan.

**NOTE:** It is recommended that approvals be done at the semester-level to allow for future semester planning within the same plan.
Step 7. If an entire plan is approved, it will have a **closed lock** icon next to it on the Manage Student Plan page. Approving an entire plan also prevents the preferred plan from being changed.

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**Approval Requests**

**Step 1.** When a student requests an approval, the advisor can accept or deny the request by opening the plan. Semesters with approval requests are identified with a **Requested Approval** message.
Step 2. Click on the term to expand it. Click on the X icon to deny the request or the closed lock icon to approve the request.

Remove Approval Requests

Step 1. When a student requests to have a semester approval removed, you can accept or deny the request by opening the plan. Semesters with approval requests are identified with a Requested To Remove Approval message.
Step 2. Click on the term to expand it. Click the **open lock** icon to **accept** the request or the **X** icon to **deny** the request.