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.

Home

Students

Roadmaps

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

Student Search

Enter Student ID

Search by Student Name

First Name

Last Name

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 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.

Manage [Student's Plans]

Program: No Declared Program
Catalog: Winter 2017

My Plans
Create a New Plan

<table>
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<tr>
<th>Preferred</th>
<th>Edit Plan</th>
<th>Action</th>
<th>Updated</th>
<th>User</th>
<th>PDF</th>
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<td>🌟</td>
<td>Mary Student’s International Mgt Plan</td>
<td>Select…</td>
<td>May 23, 2017</td>
<td>[Redacted]</td>
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* Indicates a plan without associated roadmap

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 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. 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, 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 dialog box]

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

![Delete Term dialog box]

**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 dialog box]
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
Select the button in the Preferred column next to the Plan Name to make it preferred.

A preferred plan may not be deleted unless another plan is marked as preferred. The first plan created for or by the student will automatically be marked as preferred and cannot be deleted until another plan is created.

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The preferred status of a Plan can be locked to prevent changes from being made.

- Open the preferred Plan by clicking on the Plan Name or using the dropdown menu. Two “lock” icons will be displayed in the top right.

- To lock the preferred status of the Plan, click on the button. This will prevent the Plan from being changed and will keep any other Plan from being marked as preferred.

Comments

Click the Plans tab to enter or view comments.

Add a New Comment

Click .
Click a button either to keep the comment private or to share it with the student and/or with other advisors.

[Private] [Share with: [Student] [Other Advisors]

You may use the dropdown menu to link the comment with one of the student’s Plans.

Click Save.

**Add a Comment from the Plan Builder Page**

If you have a Plan open, you can view comments related to this Plan by clicking on the Comments button in the Plan toolbar.

You will see only comments that have been linked to this particular Plan.

You may add a comment and choose to make it private or share it. It will automatically be linked to this plan.

**Reply to, Edit or Delete Comments**

Use the icons below and to the right of a comment.

[_reply] - Reply to any comment you can view.

[edit] - Edit a comment you created.

[delete] - Delete a comment you created.