# UC Denver Student Guide Planner

## Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Access</td>
<td>2</td>
</tr>
<tr>
<td>Getting Started</td>
<td>3</td>
</tr>
<tr>
<td>Creating a New Plan</td>
<td>3</td>
</tr>
<tr>
<td>Creating a Different Plan for What If Scenario</td>
<td>5</td>
</tr>
<tr>
<td>Managing Multiple Plans</td>
<td>7</td>
</tr>
<tr>
<td>The Planner: Sections and Icons</td>
<td>8</td>
</tr>
<tr>
<td>Plan Sections</td>
<td>8</td>
</tr>
<tr>
<td>Plan Icons</td>
<td>9</td>
</tr>
<tr>
<td>1: Full Degree Audit with Planned Courses</td>
<td>10</td>
</tr>
<tr>
<td>2: Printable PDF</td>
<td>12</td>
</tr>
<tr>
<td>3: Associated Roadmap</td>
<td>13</td>
</tr>
<tr>
<td>4: Plan Section with Completed Courses</td>
<td>13</td>
</tr>
<tr>
<td>5: Check Planned Courses against Degree Audit/Roadmap</td>
<td>14</td>
</tr>
<tr>
<td>6: Remove All Courses</td>
<td>15</td>
</tr>
<tr>
<td>7: Add Terms</td>
<td>15</td>
</tr>
<tr>
<td>8: Edit Courses</td>
<td>16</td>
</tr>
<tr>
<td>9: Trashcan</td>
<td>17</td>
</tr>
<tr>
<td>10: Apply Courses to Schedules</td>
<td>17</td>
</tr>
<tr>
<td>Planning from Degree Audit</td>
<td>18</td>
</tr>
<tr>
<td>Advisor Approval</td>
<td>23</td>
</tr>
<tr>
<td>FAQs</td>
<td>24</td>
</tr>
<tr>
<td>When I first create a plan, what if I’m seeing Program: No title?</td>
<td>24</td>
</tr>
<tr>
<td>How do I add a summer term when creating a new plan?</td>
<td>24</td>
</tr>
<tr>
<td>Will there be an alert for pre-requisites and co-requisites while planning?</td>
<td>25</td>
</tr>
<tr>
<td>Some classes are offered during specific semesters, will the Planner alert course availability by term?</td>
<td>25</td>
</tr>
<tr>
<td>Does an actual class need to be listed for general electives?</td>
<td>25</td>
</tr>
<tr>
<td>Why is the printable PDF not listing in progress or registered courses?</td>
<td>26</td>
</tr>
<tr>
<td>How do I add more hours to variable credit hour courses like internships?</td>
<td>26</td>
</tr>
<tr>
<td>Will I be alerted of repeats if I somehow add the same course to more than one term?</td>
<td>27</td>
</tr>
<tr>
<td>Can future planned terms be applied to Schedules?</td>
<td>27</td>
</tr>
<tr>
<td>I am trying to apply planned courses to Schedules, but the calendar icon does not appear?</td>
<td>27</td>
</tr>
</tbody>
</table>
Student Access

1. Go to your UCDAccess portal and click on Degree Audit Tools.

2. Select Planner from the drop down list.

3. This will take you directly to Planner.
Getting Started

Creating a New Plan

1. Click on the **Plans** tab in the Degree Audit
2. Under the **Plans** tab, click on **Create a New Plan**
   a. Students with undeclared majors will have **Program: No Declared Program or ____ Undeclared**

Note: If you are seeing **Program: No title, you have not yet been matriculated.** (See below screenshot) If you wish to continue, select the **No title** box next to **Program** to generate a **Degree Program** drop down list. Go to step 3 in **Creating a Plan for a Different Major/What If Scenario** (pg. 5) to continue with creating a **Plan** if you are not matriculated.
3. Fill out the corresponding boxes for **Plan Name** and **Year** and select desired **Term** and **Years To Graduation**
   
   *Note: Term must be current or future enrollment (Fall or Spring only)*

   ![Plan Information Form Image]

4. Click on **Add Plan**

5. This will take you directly into the Planner

6. All plans accessible under the **My Plans** tab anytime you access Plans
Creating a Different Plan for What If Scenario

1. To create a “What If” plan, a new program can be added
2. Click the current major in the Program box, in this example BA ENGLISH – LITERATURE/CREATIVE WRITING

3. Find, expand, and select the potential new program from collapsible list
   - Active, declared major will show up in yellow
4. Fill out the corresponding boxes for **Plan Name** and **Year** and select desired **Term** and **Years To Graduation**
   
   *Note: Term must be current or future enrollment (Fall or Spring only)*

5. Select **Add Plan**

   **Program:** BA ENGLISH - LITERATURE/CREATIVE WRITING
   **Catalog:** Fall 2018

   ![Plan Information Form]

   - **Plan Name:** Arth
   - **Term:** Fall (7)
   - **Year:** 2018
   - **Years To Graduation:** 4

   ![Add Plan Button]
Managing Multiple Plans

1. If more than one plan is created, they will appear under My Plans tab
2. The first plan created will default as the Preferred
3. The plan the student intends to apply to Schedules needs to be starred as Preferred

4. If a plan needs to be changed to Preferred, selecting the blank star beside the plan will set it as Preferred
5. Preferred/Starred Plans have the following options: Edit Plan, Rename, Or Copy
   a. Edit Plan is just another way to access Planner
   NOTE: Preferred plans cannot be deleted.
6. All other plans have Edit Plan, Rename, Copy or Delete
The Planner: Sections and Icons

Plan Sections

1. On a full or half size screen
   a. **Degree Audit section** will display on the left hand side
   b. **Plan section** will display on the right
Plan Icons
*Click on the numbers or links below to jump to specific sections

<table>
<thead>
<tr>
<th>Plan: COMM</th>
<th>3 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>![PDF]</td>
<td>![Add Course]</td>
</tr>
<tr>
<td>![Link]</td>
<td>![Remove All Courses]</td>
</tr>
<tr>
<td>![Expand All]</td>
<td>![Collapse All]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fall 2018</th>
<th>3 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Add Course]</td>
<td>![Remove All Courses]</td>
</tr>
</tbody>
</table>

1: Degree Audit Pie Chart with Planned Courses (pg. 10)
2: Printable PDF (pg. 12)
3: Associated Roadmap (pg. 13)
4: Plan Section with Completed Courses (pg. 13)
5: Check Planned Courses against Degree Audit/Roadmap (pg. 14)
6: Remove All Courses (pg. 15)
7: Add Terms (pg. 15)
8: Edit Courses (pg. 16)
9: Trashcan (pg. 17)
10: Apply Courses to Schedules (pg. 17)
1. Full Degree Audit with Planned Courses

1. This will generate a full Degree Audit with purple planned courses

   a. Like running a normal Degree Audit, this planned course Degree Audit will be archived

   b. To view previous Degree Audits with planned course notations, go to Audits Tab and select Manage
c. Previously saved Degree Audits with planned courses will display *planner-username* under Run By and a purple calendar icon under Course Type.

### Completed Audit Requests

These are the audits that have been run in the past for this student's record. Hitting the 'Run Audit' button will run a new audit report. Deleting audits removes them from this list.

1 completed audit was deleted.

<table>
<thead>
<tr>
<th>Program</th>
<th>Catalog Year</th>
<th>- Created</th>
<th>Audit Type</th>
<th>Format</th>
<th>Run By</th>
<th>Course Type</th>
<th>View</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>LABA---ANTH</td>
<td>20137</td>
<td>07/11/2018 2:56 PM</td>
<td>HTML</td>
<td></td>
<td>planner-username</td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>LABA---ANTH</td>
<td>20137</td>
<td>07/11/2018 2:53 PM</td>
<td>HTML</td>
<td></td>
<td>planner-username</td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>LABA---ANTH</td>
<td>20177</td>
<td>06/12/2018 4:43 PM</td>
<td>HTML</td>
<td></td>
<td>planner-username</td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>LABA---ANTH</td>
<td>20177</td>
<td>03/26/2018 10:59 AM</td>
<td>HTML</td>
<td></td>
<td>planner-username</td>
<td></td>
<td>View</td>
<td></td>
</tr>
</tbody>
</table>

Return to Plan Icons (pg. 9)
2. **Printable PDF**

1. This creates a printable, PDF list of completed and planned courses.

   **IMPORTANT NOTE:** This currently lists in progress and registered courses in the *Completed Courses* section. Please treat this section as In Progress, Enrolled, Registered and Completed Courses and be aware that all courses may not fully be completed.

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**TIP:** This printable PDF can also be accessed through the *Plans* tab on the main screen under *My Plans*.

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*Return to Table of Contents*
3: Associated Roadmap

1. This allows you to access an associated Roadmap, this feature is not available at this time.

4: Plan Section with Completed Courses

1. Displays only the Plan section with completed courses with grades, in progress/registered courses and/or transfer courses
   a. Select the icon again to return to full view

Return to Plan Icons (pg. 9)
5: Check Planned Courses against Degree Audit/Roadmap

1. Degree Audit – a purple icon will appear next to planned courses.
2. Plan section - courses will receive a symbol per the legend on the bottom of the page, in this example these courses received an x as they are *Incomplete Planned Course* (noted on the legend).

Legend:
- = Course List
- = Course with Pre or Co Requisites
= = Completed Course
IP = In Progress Course
X = Incomplete Planned Course
- = Completed Course, No Credit
- = Alerting possible issue with course
= = Complete
- = Planned
- = In Progress
- = Unfulfilled

Return to Plan Icons (pg. 9)
6: Remove All Courses

1. Removes all courses
   a. This button will remove all future planned courses, except completed and/or registered classes.

Return to Plan Icons (pg. 9)

7: Add Terms

1. Adds another term to plan.

Return to Plan Icons (pg. 9)
8: Edit Courses

1. Individual classes can be removed in edit section
2. Hours can be edited for variable class hours like independent study, internships, etc.
   a. These particular classes cannot be added more than once in one term and you will need to combine all hours for variable class hours. In the example below, if you are planning to take 3 internships under ANTH3939 – you will need to add three hours instead of adding the class 3x.
   b. Click Submit to save updated hours

Return to Plan Icons (pg. 9)
9: Trashcan

1. Removes an individual term and all courses

![Trashcan Image]

Return to Plan Icons (pg. 9)

10: Apply Courses to Schedules

1. Once terms are planned, you may select the calendar icon to Schedule planned courses
   a. The planned courses on the calendar will only work for terms for the current registration cycle

![Schedule Courses Image]

Return to Plan Icons (pg. 9)
Planning from Degree Audit

1. In the Degree Audit, expand **Unfulfilled** degree requirements to list recommended courses

2. Clicking on a course will pull up course descriptions

3. Once decided which course to take, drag the course to the desired term to the **Plan** section
   a. Make sure that the course is directly on top of the desired term, it will turn blue to allow you to drop
4. Alternative to the drag and drop, courses can be manually added to the Plan section
   a. After expanding a term by clicking on the caret symbol ▶, select Add Course and a course search option will populate
   b. Fill in the Department Abbreviation, entering a letter initially will populate a list
   c. Under Course Number, you can enter numbers 1 through 4 to populate a list of course numbers

Several important points to note:

- **Variable credit courses like Topics, Internships, and Independent Study only list 1 credit hour when initially adding. You may change the number of credit hours through the Edit Icon.** These variable credit courses cannot be added twice to the same term, you need to account for all hours combined. In this example: A student is talking two 1 credit hour Internships under Anth3939, edit hours to 2 instead of trying to add two Anth3939 classes.
There may be some cases where you are adding a recommended course more than once. If you are adding the same class to several semesters, the Plan section will not alert that classes have been repeated. The last term that the repeated class is added to will be applied to the Degree Audit section.

The other classes that were repeated will be set as >R in Work Not Applied. The only time a repeat is alerted is when a completed or in progress class has been added to the Plan section, it will show up with either a letter grade or *** for in progress.
5. Once courses have been set to desired term, select the check mark to apply planned courses to the Degree Audit.

Plan: Anth

<table>
<thead>
<tr>
<th>Course</th>
<th>Hours</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FINE2600</td>
<td>3</td>
<td>Art History Survey I</td>
</tr>
<tr>
<td>ECON2012</td>
<td>3</td>
<td>Prin of Econ: Macroeconomics</td>
</tr>
<tr>
<td>BIOL2051</td>
<td>3</td>
<td>General Biology I</td>
</tr>
</tbody>
</table>

Check plan against degree audit to make sure requirements are being fulfilled.

Expand All / Collapse All

Add Course
6. Once check applied, the **Degree Audit** section will display a purple calendar next to planned courses and a symbol per legend will appear in the **Plan** section, in the example below the symbol appears as an **Incomplete Planned Course**

![Degree Audit and Plan Sections](image)

**Legend**
- Course List
- Course with Prerequisite
- Completed Course
- In Progress Course
- Incomplete Planned Course
- Completed Course: No Credit
- Semester-passing course
- Complete
- 3 Planned
- 4 In Progress
- 2 Unfilled

7. Refer to **Plan Icons** Sections: 1 & 2 (pg. 13-15) for review of how to view pie charts of planned courses or print PDFs

8. Planned classes for the **upcoming** registration term can be imported directly into the scheduler, click on the calendar icon to apply the upcoming term of planned classes to the **Schedules** application
   a. Reminder: The calendar icon will only appear if the Plan is marked as **Preferred** in My Plans tab
   b. The calendar icon will appear for every term that has planned courses, but if you click on an calendar icon next to a future term – those classes will not be added to Schedules
   c. Please see Schedules guide for training

![Plan Icons](image)
Advisor Approval

When an advisor has approved your Starred/Preferred plan, you will no longer be able to make edits, but you can add courses for the upcoming registration term into Scheduler

1. If an advisor has approved an entire plan:
   a. A green notification will appear on the left hand side notifying of:
      i. Who approved it
      ii. Which program plan was approved
      iii. And the date and time it was approved

2. In Plans tab under My Plans, the Starred/Preferred plan will no longer have a star and instead a lock icon will appear to let you know this entire plan is approved and locked

2. If an advisor has approved one or more individual terms:
   a. Your approved term will receive an Approved notification in green
   b. The Starred/Preferred plan will not show a lock icon like it will for an entire approved plan
FAQs

When I first create a plan, what if I’m seeing Program: No title?
This means you have not yet been matriculated. If you wish to continue, select the No title box next to Program to generate a Degree Program drop down list. Expand and select the program you wish to plan.

How do I add a summer term when creating a new plan?
The option to add a summer term will not appear initially when creating a new plan. When creating a plan, select either term and once you are in Planner click on the Add icon button which will allow you to add a summer term from the drop down list.
Will there be an alert for pre-requisites and co-requisites while planning?
Pre-requisites will be alerted in the Plans Section. They will turn red and receive the Pre-Req/Co-Req symbol that’s on the legend. Clicking on the course will pull up a course description and which class is the pre-requisite or co-requisite for that class.

Legend

Some classes are offered during specific semesters, will the Planner alert course availability by term?
No, similar to how you may normally plan for upcoming semesters, you may not always account for or know about courses that are offered during a specific semester. The Planner will not alert you, but those courses will not be applied to Scheduler.

Does an actual class need to be listed for general electives?
Yes, the planner does not allow for a placeholder like “DEPT Elective” or “General Elective”, you must choose an actual class through the Add Course button.

After expanding a term by clicking on the caret symbol, select Add Course and a course search option will populate:

1. Fill in the Department Abbreviation, entering a letter initially will populate a list
2. Under Course Number, you can enter numbers 1 through 4 to populate a list of course numbers
Why is the printable PDF not listing in progress or registered courses?

The printable PDF currently lists in progress and registered/enrolled courses under the *Completed Courses* section. Please treat this section as In Progress, Enrolled, and Completed Courses and be aware that all courses may not fully be completed.

Tip! This printable PDF can also be accessed through the **Plans** tab on the main screen under **My Plans**.

How do I add more hours to variable credit hour courses like internships?

Variable credit courses like Topics, Internships, and Independent Study only list 1 credit hour when initially adding. You may change the number of credit hours through the Edit Icon since these variable credit courses cannot be added twice to the same term, you need to account for all hours combined. In this example: A student is talking two 1 credit hour Internships under Anth3939, edit hours to 2 instead of trying to add two Anth3939 classes.
Will I be alerted of repeats if I somehow add the same course to more than one term?
No, repeats will not be alerted in the case where you unknowingly add a recommended course to more than one term. After planning classes, it is best practice to check Work Not Applied section to check for repeated courses. The other repeated classes will be set as >R in Work Not Applied. The only time a repeat is alerted is when a completed class has been added, it will show up on Plan with the letter grade for the last term that the repeated class is added to will be applied to the Degree Audit section.

Can future planned terms be applied to Schedules?
Only planned courses for the upcoming registration term can be applied to Schedules. The calendar icon for Scheduler appears for all terms, but those classes will not be applied until they are the upcoming registration term.

I am trying to apply planned courses to Schedules, but the calendar icon does not appear?
If you have more than one plan created, you must star the preferred plan in order for it to be applied to Schedules. Go to Plans tab and under My Plans, select the star next to the plan you want imported to Scheduler. Once you go back into that plan, a calendar icon will appear. If an entire plan is locked by an advisor and this symbol appears instead of a star, you will not be able to star other plans.