**BACKGROUND INFORMATION**

*Plans* allows creation of a long-term plan for degree completion and verifies that courses used will fulfill degree requirements.

- If a student changes their major and/or concentration, their plan will be deleted and a new plan will need to be created.
- **GPA Calculator** and **Term Calculator** are helpful GPA projection tools.

**PLANS FEATURES**

- There are different Plans views available for you to use. The **Notes** view allows you to view advising notes for each term. Notes can be added to either the entire plan, the term or the requirement.

- The **Calendar** view is a more compact view of your courses, term by term.
• The **Audit** view is the default view if a student already has a plan. Here you can see the student’s plan alongside the student’s audit.

• The **Edit** view is the default view if a student does not yet have a plan. Here you can only see the plan. Here you can edit and add to the plan. After changes have been made, click the **Audit** button at the bottom of the screen to see the new audit.

• Tracking is a feature to help make sure a student is “on-track” for their degree. Tracking consists of tracking the entire plan, the individual terms and the requirements. Only critical requirements will be tracked. The following will be considered:
  - On track – a requirement was taken in the term in which it was tracked
  - Off track – a requirement was not taken
  - Warning – a requirement was taken in a later term
INSTRUCTIONS

1. To create a plan, input a plan name into the Description box.

2. Click the “+” in the top plan bar to create a new term (semester).

3. Select term from the dropdown list.
4. When editing a plan, there are multiple ways to add requirements:
   - click the “+” on the term bar and input the name of the course into the Course Requirement block or click the magnifying glass to search for course options
   - drag a course from the sidebar dropdown list into the requirement block
5. You can add two types of requirements:
- Course requirement: used to add one course at a time
- Choice requirement: used to add multiple courses

**PLANS TIPS & TRICKS**

- Make sure the Active and Locked boxes are checked before saving a student’s plan.

- Terms should be added to the plan as the student matriculates. Do not create multiple plans unless the student changes degree or major.

- You can add unlimited terms and unlimited requirements.

- A minimum grade can be entered for each requirement.
- Requirements can be marked as **Critical** to be tracked for the student.

![Image of tracking system]

**CONTACT**

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