



# Student Educational Planner Advisor User Guide

Texas A&M University Corpus Christi



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*As you begin to explore the Student Educational Planner (SEP), this guide will assist you with learning how to use the system to plan future classes, keep track of requirements, and record notes for students regarding their academic records.*

# Student Educational Planner Introduction

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## What is the SEP?

The DegreeWorks Student Educational Planner (SEP) is an advising tool that students and advisors can use to map out a clear pathway for timely degree completion. Advising plans created in SEP will show students the required courses within their program(s) and a recommended timeline of when they should be completed.

## Why use it?

The SEP helps advisors and students work together to plan each term of coursework to ensure student success. By developing a plan, students will have a clear path of coursework needed in sequential order. In addition, advisors can use the features in the plan to identify courses that are essential to students' timely degree completion.

# Getting Started

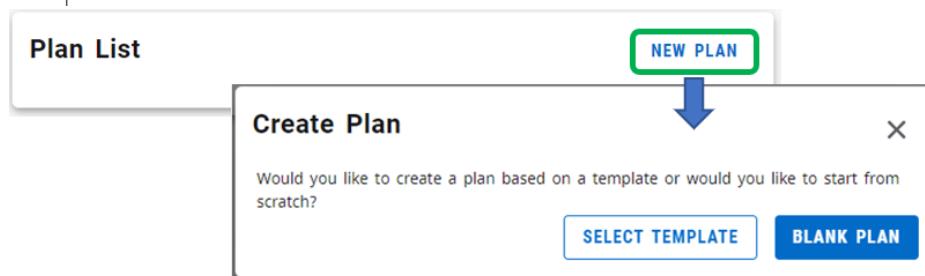
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1. Go to <https://dwprod.tamucc.edu:8471/DashboardServlet/>
2. Log in using your DUO mobile device
3. Select a student by either entering the student's ID or clicking "Advanced search" (below student ID).
4. Once you have selected a student, click on the "Plans" tab. You will see it as a tab at the very top or under the three lines (also known as "open navigation") at the very top right.



- a. If a plan exists, you will see the plan under "Plan List".

- b. If a plan does not exist, you may select “New Plan” and have the choice of “Select Template” or “Blank Plan”.



## Assigning a New Plan

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There are two different options for creating a new plan: [Select Template](#) or [Blank Plan](#). Blank Plans are useful for students that are already in progress towards their degree completion, while Templates will be most beneficial to new students who have not yet started their academic career.

### Creating a Blank Plan

If a plan exists, the page will display the “Plan List” and beneath that will be a hyperlink description of the active plan created. If a plan does not exist, then you may select “New Plan” (upper right corner of “Plan List”) to create a plan based on a template or to start from scratch.

Continue to the [Editing Plans](#) section to learn more about modifying blank plans

*We recommend that you select a department-approved template for the chosen major and edit that plan to meet individual student circumstances.*

### Creating a Plan from a Template

After clicking “Select Template” you will be brought to a list of templates.

You may “Search Templates” using the magnifying glass and placing the program code for the degree the student is seeking. Make sure to input the correct start term to the term scheme (e.g. “4 year **fall** start” shows the term the plan will start with for a 4 year plan) and select the template with the catalog year appropriate for the student you are advising. Once you have your template you will click the blue description link (blue arrow below).

Reference the [Description Table](#) for the format used when searching templates.



**Create plan from template** ✕

Select starting term \*  
Fall 2021

Search templates  
BU-BBA-ACCT

Description ↑	Catalog year	Level	Degree	Major	College	Term scheme	W
BU-BBA-ACCT	✓ 2021	U	BBA	ACCT	BU	✓ 4_YR_FALL_START	AC

Page 1 of 1

Total results: 1

When selecting a template, you will not be allowed to select a different start term for a particular term scheme. For example, below a Spring start term was selected but the template was created for a Fall start. If the Department would like a specific template created for a certain start term, please contact your college's Department Chairperson or Associate Dean for approval and creation of the template, then the Departments senior Advisor may assist in adding this new template to Degree Works.

✕ There was an error creating the plan. ERROR: The starting term type does not match the term scheme first term type (SPRING/FALL)

Select starting term \*  
Spring 2022

Search templates  
BU-BBA-ACCT

Description ↑	Catalog year	Level	Degree	Major	College	Term scheme	W
BU-BBA-ACCT	2021	U	BBA	ACCT	BU	4_YR_FALL_START	N

\*\*\*DESCRIPTION NOTE: Templates are named College-Degree-Major. Further descriptions are shown in the table below.

Description	Concentration	Campus	Online	Specialized
Notation	: <i>Health Care</i>	[RELLIS]	{Online}	(Two Year)

\*\*\*Note: Advisors have access to edit the plan after a template is selected OR once a blank plan is created.



# Editing Plans

For most students, Student Educational Plans will require adjustments after selecting the template. For example, the template for the typical freshman assumes the student will need to fulfill their foreign language requirement. Students who come in with credit for this requirement will need their plan adjusted to reflect fulfilled requirement.

To edit Description, select the pencil. Under Description, remove the program name and change the description to the student's name followed by A# and (SEP Plan). For example: "Doe, John A00000000 (SEP Plan)".

The image shows a user interface for editing student educational plans. On the left is a plan card for 'BU-BBA-ACCT'. It includes fields for 'Degree' (Bachelor of Business Admin), 'Level' (Undergraduate), 'Active' (No), 'Status' (Not locked), and 'Tracking Status' (NOT DISPLAYED, PLAN IS NOT ACTIVE). A green box labeled 'Edit plan' with a pencil icon is overlaid on the card. To the right is a modal window titled 'Edit Plan'. It has a 'Description \*' field containing 'Doe, John A00000000 (SEP Plan)', and two checkboxes: 'Active' and 'Locked'. At the bottom of the modal are 'CANCEL' and 'SAVE' buttons. A red double-headed arrow connects the 'Edit plan' button on the card to the 'Edit Plan' modal.

**Accurate Plans = Better Forecasting:** See below "Editing Tools" that will assist in editing the plan.

Once the plan has been edited to the students' needs and "audit view" is utilized (this is to make sure the plan matches the students' course requirements needed to graduate), the Advisor will then check the "Active" and "Locked" boxes. A plan being "active" allows TAMUCC to track student activity. A plan being "locked" allows tracking status to display checking if student is "On Track" (has taken courses planned) or "Off Track" (has NOT taken courses planned). If indicator is NOT "locked" or "active" it will be reported as "not evaluated" and tracking will not be initiated for the plan.

If editing is needed for a future semester, Advisors do have the access to still edit an active/locked plan and save changes. Off-track and not tracked requirements will be editable in past terms.

☒ Active ☒ Locked



**Doe, John A00000000 (SEP Plan)**


PLAN LIST
NEW PLAN

**Degree** Bachelor of Business Admin  
**Level** Undergraduate  
**Active** Yes | **Status** Locked | **Tracking Status** OFF-TRACK

**Last updated:** Sanchez, Mary Elizabeth on 06/18/2021  
[Audit](#) [Delete plan](#) [Save as copy](#)

< **Still Needed** >

Core Curriculum

Business Core Curriculum

Behavior in Organizations >

< >
ADD TERM

**Fall 2021**


OFF-TRACK Credits: 13.0

+

BUSI 0011  
 Credits: 0.0

WARNING

**Spring 2022**

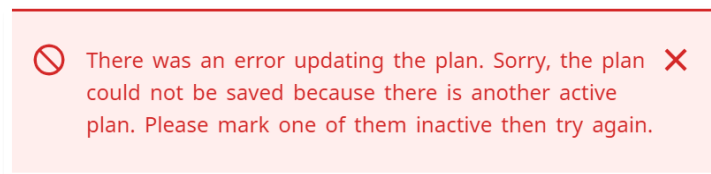

--- Credits: 13.0


+



ECON 2302  
 Credits: 3.0

---

**Only one plan can be active.** If one plan is already active and you are trying to create another, you will receive the following message:



To make sure each student has one plan, you can view all plans created for the student under "Plan List" and delete  the plans not needed/not active. Since students can also view a list of plans assigned to them, to avoid confusion, make sure only one plan is present.

**BU-BBA-ACCT**  

**PLAN LIST** **NEW PLAN**

**Degree** Bachelor of Business Admin


**Level**

**Active** Yes [Advanced search](#)

**Classification :** Sophomore **Level :** Undergraduate **Program :** Accounting, BBA

**College :** Business **Major :** Accounting

**Plan List** **NEW PLAN**

Description	Active	Modified ↓	Who	Degree	Level	Status
<a href="#">Doe, John A00000000 (SEP Plan)</a>	Yes	06/18/2021	Sanchez, Mary Elizabeth	BBA	U	Locked 



Page 1 of 1 Total results: 1

## Editing Tools

**Edit plan** By selecting  you may enter text in the Description box to re-name [For example: "Doe, John A00000000 (SEP Plan)"] **and check off the Active and Locked boxes** once all course edits are complete/planned.

**Expand all Terms**  in plan header if you would like to see planned requirements in all terms.




**Previous and Next**   icons allow you to scroll through the terms left and right.



**Add notes** to the plan by clicking the  icon. There are three areas you may add notes, in the Plan header, Term header, and at Course level. After a note is added, it will change to a blue outline ; if you wanted to view a note you will select the page icon outlined in blue.

**Add terms** to the plan by clicking **ADD TERM** in the plan header (displayed at the top right of the plan next to expand icon).





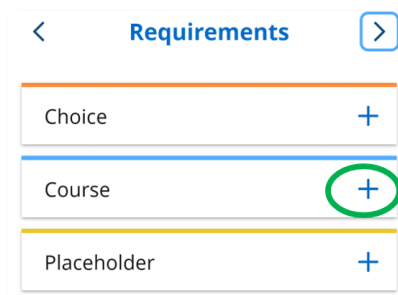



Expand or collapse the plan sidebar by clicking . On the sidebar (top left next to the term headers) you will be able to select   previous and next icon to scroll to list of "Requirements" (choice, course, placeholder), "Still Needed", and "Courses".


**Add a Course by Drag & Drop:** Click the arrow under "still needed" or "courses" section at the left of the screen. If you do not see "still needed" at the left, you will be able to select   previous and next icon to scroll to **< Still Needed >**. Drag and drop courses into desired terms.




**Add a Course manually** under "Requirements" listed on the sidebar by clicking the  icon and select "course". under "Requirements" listed on the sidebar by clicking the  icon and select "Placeholder".





Another option is selecting  add requirements icon at the term level and select "courses" or "still needed" tab. You can then manually search, select, and add the course to the plan.


**Add a Placeholder** under "Requirements" listed on the sidebar by clicking the  icon and select "Placeholder". A placeholder is useful when more information is required, such as a note to remind the student to apply for graduation.

**Add a Choice Requirement** under “Requirements” listed on the sidebar by clicking the  icon and select “Placeholder”. A choice is useful when multiple courses can fulfill requirement.

**Move Requirements** between semesters by selecting desired course, choice, or placeholder. Once requirement is grabbed (by left clicking on mouse), drag and drop it into appropriate term.

**Reassign and Delete terms** as needed by clicking the “more”  icon at term header. Selecting “Reassign” allows requirements on a term to be moved to another term.

**Delete a course** by selecting  icon next to the course planned and select “Delete this requirement”. The same process goes for deleting a choice requirement or placeholder.

**Don't forget to:**  edits. The save button is located at the bottom right after adding a choice, course, placeholder requirement, after adding/editing notes, and after updating description, selecting/deselecting locked & active plan. When dragging requirements between terms, the plan automatically saves.

\*\*\*NOTE: Once plan is Locked the advisor will not be able to Edit past terms. You will only save an “Active” and “Locked” plan once all editing is complete and ready for the student to view.

## Choice Requirements

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When there are several course options that can fulfill a planned requirement, a Choice requirement can be used; the plan has all choice requirements come up in orange. An unlimited number of options can be defined in the Choice requirement. An option can be any combination of actual courses, wildcards, or ranges.

Most templates include general choice requirements (e.g., for various categories of the core) that will need to be replaced by a course. See below for examples of choice requirements and how to select a course.

### Examples of Choice Requirements

- If the department did not mention which core course would be applied to each core area, the choice requirement will list the core options until the advisor selects the course for the student's plan. Also notice with each core choice, a core pointer is assigned (this appears when you select three dots for more and “edit this requirement”. When you are not sure what the requirement is, please feel free to select the note given to the choice.



### Requirement Notes

Created on 06/18/2021

By Source Template

Creative Arts Core Course

### Edit Requirement

Requirement type  
Choice

☐ Critical

#### Choice requirement

☐

ARTS 1301

Q

Attribute

v

x

Add a paired course or lab

☐

ARTS 1303

Q

Attribute

v

x

CLEAR SELECTION

Credits  
3.0

Pointer  
Creative Arts Core Curriculum

Minimum grade

Campus

Delivery

- In some instances, like the examples below, the choice requirement may be labeled with a wildcard (@) symbol.
  - This example is saying any (@) Accounting (ACCT) course with a minimum 3 credits is required. When you see a choice that is in the format “@ACCOUNTING ELECTIVE” (no space between the @) remember it is just a way to display a note/message. Some choice requirements are also given a pointer (as shown in example below). If there is a pointer assigned to the requirement, you may view the audit to see where the pointer lands; this pointer lands in the scribed area that requires Upper-Level ACCT Electives.

@ACCOUNTING ELECTIVE  
Credits: 3.0

More information  

Edit this requirement

  
 Delete this requirement  
 Reassign this requirement

### Edit Requirement

Pointer  
Accounting Elective



- Since the foreign language area can be fulfilled by different rules, the choice requirement will say any (@) foreign language with a minimum credit of 3 required. Just like in this example with foreign language, there may be two of the same choices. The requirements are broken up in 3 credits because in some cases students may only need 3 credits to fulfill the area (if this happens, one will simply be deleted); the pointers attached will say "FORLANG1" and "FORLANG2" for this reason.

The screenshot shows a requirement editor interface. On the left, there are two requirement cards, each labeled "@FOREIGN LANGUAGE" with "Credits: 3.0". Each card has a three-dot menu icon. Arrows point from these icons to an "Edit Requirement" panel on the right. This panel contains two "Pointer" fields: "Foreign Language 1" and "Foreign Language 2".

- You also may have choices that require any course number (@) with the prefix (ACCT, BLAW etc.); in this example this is to fulfill the business elective requirement. The advisor may select any course with the following prefixes with a minimum 3 credits. The notes also explain the course cannot be required in the major area; it is essential for Advisors to be familiar with the curriculum so students will not take extra courses. If you are not sure of the requirement, you may view the audit, go to the student's worksheet, or view the catalog. When adding a prefix with @ wildcard symbol, make sure there is a space in between (as shown below).

The screenshot shows a requirement editor interface. On the left, a requirement card lists course prefixes: "ACCT @ or BLAW @ or BUSI @ or ECON @ or FINA @ or MGMT @ or MKTG @ or MISY @ or OPSY @ or ORMS @" with "Credits: 3.0". Arrows point from the three-dot menu and a copy icon on this card to an "Edit Requirement" panel and a "Requirement Notes" panel on the right. The "Edit Requirement" panel shows a "Pointer" field with the text "Business Elective". The "Requirement Notes" panel shows a "Created on" date of "06/18/2021" and a "By" field with the text "Select elective course not already required in your major.".

- Any (@) course with 090 attribute is an example of what you may see with core courses. Core attribute numbers ranges from 010 to 090. Make sure when using double wildcard "@ @" that there is a space in between.



- If you select the three dots next to “@ @ with 090” and edit, you will notice under “Attribute” Component Area Option is selected, this is because many of the core courses can fulfill this area. The way we designate the Component Area Option is with the 090 attribute. Once an advisor knows what course is planned to fill the area, they will follow the steps below in “how to select a course”.

- This choice indicates the following prefixes (ACCT, BUSI etc.) must be an upper division course number (3000 or 4000 level). The colon (:) indicates the range allowed for upper-level courses. Make sure to add a space in between the prefix and course number (as shown below).

- You also may see a choice that says any prefix (@) that is required to be a 3000 or 4000 level course. For this type of choice, make sure to add a space between the wildcard “@” and course number “3000:4999” (as shown below).



@ 3000:4999  
Credits: 3.0




Pointer  
LA General Elective

**Requirement Notes**

Created on 06/22/2021

By  
Upper Division Elective; needed to meet overall hours required for this degree. Consult your academic advisor for details.

## How to Select a Course

- When there are choice requirements, advisors will select/plan a course for the student by clicking "more"  icon.
- Click the radio  icon next to the desired course and select .

ARTS 1301 or ARTS 1303  
Credits: 3.0

More information

**Edit this requirement**

Delete this requirement

**Choice requirement**

☒ ARTS 1301  Attribute

[Add a paired course or lab](#)

☐ ARTS 1303  Attribute

- If you would like to add another course to the choice.
  - Click **Add** at the top right of the "Edit Requirement" page.
    - At the bottom of the choice requirements, you have the option to type in course OR search another using the magnifying glass.

☐  Course  Attribute

[Add a paired course or lab](#)

- The search will filter when you start typing the course and allow you to select the one you are wanting.



### "Duplicate Requirement" Message

For course requirements (those in blue) you will receive the following "Duplicate requirement" message if you try to add/plan the same course twice.

As the example below shows, the courses listed as choices may be listed twice. Some requirements have scenarios where more than one class is needed. For example, 6 credits are needed to fulfill the history core, but three (or more) courses are options. The choice is repeated because it can be planned in different ways.

For choice requirements (in orange), if the same course is selected twice, you will not receive a notification of a duplicate requirement; be sure to not select the same course for both choice requirements (e.g. HIST 1301, 1302, 3331 twice).

For choice requirements, double check the same course was not selected twice in the plan.



Selected: HIST 1301

Credits: 3.0

Selected: HIST 1302

Credits: 3.0

To make sure the course is not selected twice, or you have not planned a course that is not needed, you may view the “**Audit**” (located at top left of the plan above the “sidebar”). If the planned course is not needed because the student already took the course, you may see the scenario below; the planned courses in the audit (“PLAN”) and the transfer courses at the very bottom under “Fall Through/additional courses”. If additional courses are planned, you may remove the additional planned courses accordingly when editing the plan.

Core Curriculum

IN-PROGRESS

Credits required: 42   Credits applied: 42   Catalog year: 2020-2021   GPA: 4.000

Course	Title	Grade	Credits	Term
SEPPOINTER HISTCORE1	Requirement planned but choice not selected	PLAN	(3)	Sum I 2022
SEPPOINTER HISTCORE2	Requirement planned but choice not selected	PLAN	(3)	Sum I 2022

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Additional Courses

Credits applied: 65   Classes applied: 25

Course	Title	Grade	Credits	Term
HIST 1301	US HISTORY TO 1865	TC	3	Fall 2013
	Satisfied by: HIST1301 - UNITED STATES HISTORY I - DEL MAR COLLEGE			
HIST 1302	US HISTORY SINCE 1865	TA	3	Spring 2019
	Satisfied by: HIST1302 - UNITED STATES HISTORY II - DEL MAR COLLEGE			



# Scribe Pointers

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Choice requirements will not fulfill audit requirements unless a scribe pointer is attached. Pointers are created and maintained by the Registrar's office. Below is the list of all available scribe pointers.

**Note:** A scribe pointer name or "Key" is only allowed a max of 12 characters.

## Core Pointers:

<u>Name (Key)</u>	<u>Description</u>
COMMCORE1	Communication Core Curriculum 1
COMMCORE2	Communication Core Curriculum 2
MATHCORE	Mathematics Core Curriculum
SCIENCECORE1	Life and Physical Sciences Core Curriculum 1
SCIENCECORE2	Life and Physical Sciences Core Curriculum 2
LANGCORE	Language, Philosophy and Culture Core Curriculum
ARTCORE	Creative Arts Core Curriculum
HISTCORE1	American History Core Curriculum 1
HISTCORE2	American History Core Curriculum 2
POLSCORE1	Government/Political Science Core Curriculum 1
POLSCORE2	Government/Political Science Core Curriculum 2
SOCIALCORE	Social and Behavioral Sciences Core Curriculum
COMPCORE1	Component Area Option Core Curriculum 1
COMPCORE2	Component Area Option Core Curriculum 2

## Foreign Language Pointers:

<u>Name (Key)</u>	<u>Description</u>
LA_FORLANG1	Liberal Arts Foreign Language 1
LA_FORLANG2	Liberal Arts Foreign Language 2
FORLANG1	Foreign Language 1
FORLANG2	Foreign Language 2




Pointers Created for Each College:


<u>Name (Key)</u>	<u>Description</u>
BU_ACCELECT	Accounting Elective
BU_BUSIELECT	Business Elective
BU_ECONSELECT	Economics Elective
BU_FINAELECT	Finance Elective
BU_GENELECT	Non-Business Elective
BU_HCELECT	Health Care Elective
BU_MGMTELECT	Management Elective
BU_MISYELECT	MISY Elective
BU_MKTGELECT	Marketing Elective
BU_UPELECT	Upper-level Business Elective
EH_FOUND	Special Foundations Elective (KINE:PAHP)
LA_ARTELECT	Upper Division ARTS Elective
LA_CONV	Conventions, Forms, and Genres
LA_CRIJELECT	Criminal Justice Electives
LA_GENELECT	LA General Elective
LA_MUSIMUAP	Music Principal Applied Studio
LA_MUSIMUEN	Music Major Ensemble
LA_PROAPELEC	Media Production Applied Electives
LA_PROELECT	Media Production Electives
LA_PUREELEC	Public Relations Prescribed Electives
NH_GENELECT	NH General Electives
SE_ATSCELECT	ATSC Elective
SE_BIMSELECT	BIMS Elective
SE_BIOSELECT	BIOL Electives
SE_DESELECT	Designated Electives
SE_MATHELECT	Upper Division MATH Elective
SE_TECELECT	Technical Electives
SE_UPELECT	Upper-Level Elective
UC_APCOURSE	UNVS Approved Courses
UC_APPRELECT	UNVS Approved Course Electives
UC_APUPELECT	UNVS Approved Upper-Level Course
UC_SUPPELECT	UNVS Supporting Electives
UC_UPCOURSE	UNVS Approved Upper-Level Course
UC_UPELECT	UNVS Upper-Level Elective
VOCATIONAL	Vocational Elective Course <i>(so far only University College uses)</i>




# Placeholders

Placeholders are “informational only” requirements that can display what needs to be completed as a part of a degree. The plan has all placeholder requirements come up in yellow. Any number placed in the “Value” of placeholders will not be added to the term total credits.


For every Template Created you will notice the following placeholder in the second to the last term. This is created as a friendly reminder to students, so they know what term to apply to graduate. The advisor will place the term (e.g. Fall 2025) under “Value” after selecting  icon.

Apply to Graduate This Term--> 

[Enter term here]




If the core was not specified in the “course sequencing” tab of the catalog, you may notice some core choices in a summer 1 term (or if something was planned in summer 1, summer 2 term); we call this a “core bank”. University Core Curriculum Placeholders were created to allow advisors to drag the core credits, from core bank, to the term that plans University Core for the minimum value of credits.


Spring 2022 

Credits: 4.0

+


HIST 1301 or HIST 1302 or  
UNIV 110 HIST 3331 or @ @ with 060  
Credits: 1.0 Credits: 3.0







University Core Curriculum

3.00







Sum I 2022 

Credits: 6.0


+

HIST 1301 or HIST 1302 or  
HIST 3331 or @ @ with 060  
Credits: 3.0





HIST 1301 or HIST 1302 or  
HIST 3331 or @ @ with 060  
Credits: 3.0



\*\*\*NOTE: After you drag the necessary core course to the term needed, you may delete the core placeholder; this will help alleviate any confusion of course requirements with the student.



# Plan Views

Degree Works offers several options for viewing SEP plans.

## Edit View

After selecting a plan, you will notice it will allow you to edit the plan right away. When you make changes, the changes save right away as well. The only “edit view” you will ever need to select is the pencil to edit the description and make a plan active and locked (or deselecting the indicators).

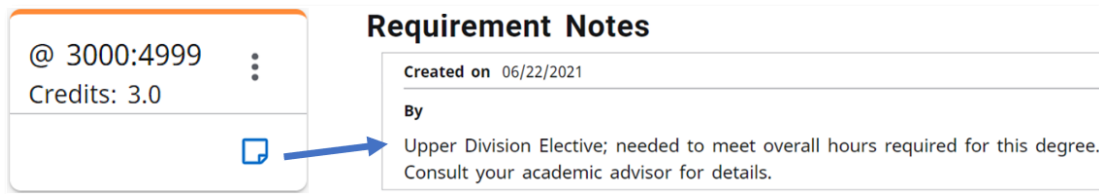
The **Edit View** allows advisors and students to make changes to a plan in SEP. This is the default view. As an advisor, this is where you will likely spend most of your time helping students update their plans. *This view should be used for advanced editing of plans; students will see this view but not be able to make changes.*

The screenshot displays the 'Edit View' for a plan named 'BU-BBA-ACCT'. At the top, there are buttons for 'PLAN LIST' and 'NEW PLAN'. Below the plan name, the degree is listed as 'Bachelor of Business Admin' and the level as 'Undergraduate'. The plan's status is 'Active: No', 'Status: Not locked', and 'Tracking Status: NOT DISPLAYED, PLAN IS NOT ACTIVE'. A toolbar includes 'Audit', 'Delete plan', and 'Save as copy' options. The main area is divided into a left sidebar with a 'Still Needed' section containing 'Core Curriculum', 'Business Core Curriculum', 'Behavior in Organizations', and 'Major Field Test Review Co...'. The right side shows two term columns: 'Fall 2021' (Credits: 16.0) and 'Spring 2022' (Credits: 13.0). Each term column has an 'ADD TERM' button and a list of courses. Under 'Fall 2021', the course 'BUSI 0011' (Credits: 0.0) is listed. Under 'Spring 2022', the course 'ECON 2302' (Credits: 3.0) is listed. Each course entry has a plus button to add more courses and a trash icon to remove it.



## Notes View

The **Notes View** includes key information provided by departments for each degree program. This view highlights recommended advising notes or explanation of what the requirement is. As users scroll, they may see advising notes assigned to the degree, term, or to course requirements. If a requirement shows the blue note, then there is a note to view. If it is greyed out, then no note has been made.



The screenshot displays a user interface for viewing requirement notes. On the left, a card shows the course identifier "@ 3000:4999" and "Credits: 3.0". A blue icon of a document with a checkmark is visible on this card, with a blue arrow pointing from it to the right. On the right, a panel titled "Requirement Notes" contains the following information:

- Created on** 06/22/2021
- By** Upper Division Elective; needed to meet overall hours required for this degree. Consult your academic advisor for details.

## Audit View

The **Audit View** allows users to view a plan alongside a students' degree audit. This differs from the traditional degree audit because the audit view includes the courses a student "plans" to take, not just their current and past courses. **In instances, where an advisor notices the audit does not display a requirement planned, the advisor will have to make sure to add the course in the student's plan as it will be needed to graduate.** The audit view is only meant for viewing and no editing. All planned coursework will display "PLAN" (for planned) in addition to the "ENR" registered courses.



[Audit](#)[Delete plan](#)[Save as copy](#)**Core Curriculum****IN-PROGRESS**

Credits required: 42   Credits applied: 42   Catalog year: 2021-2022   GPA: 0.000

Course	Title	Grade	Credits	Term
ENGL 1301	COMPOSITION I	ENR	(3)	Fall 2021
SEPPINTER COMMCORE2	Requirement planned but choice not selected	PLAN	(3)	Spring 2022
MATH 1324	BUSINESS MATHEMATICS	PLAN	(3)	Spring 2022
SEPPINTER SCIENCECORE1	Requirement planned but choice not selected	PLAN	(3)	Spring 2022
SEPPINTER SCIENCECORE2	Requirement planned but choice not selected	PLAN	(3)	Spring 2023
SEPPINTER LANGCORE	Requirement planned but choice not selected	PLAN	(3)	Sum I 2022
SEPPINTER ARTCORE	Requirement planned but choice not selected	PLAN	(3)	Sum I 2022
HIST 1302	U.S. HISTORY SINCE 1865	ENR	(3)	Fall 2021
SEPPINTER HISTCORE2	Requirement planned but choice not selected	PLAN	(3)	Sum II 2022
POLS 2305	U.S. GOVERNMENT AND POLITICS	PLAN	(3)	Fall 2022
POLS 2306	STATE AND LOCAL GOVERNMENT	PLAN	(3)	Spring 2023
ECON 2301	MACROECONOMICS PRINCIPLES	ENR	(3)	Fall 2021
SEPPINTER COMPCORE1	Requirement planned but choice not selected	PLAN	(3)	Fall 2022
SEPPINTER COMPCORE2	Requirement planned but choice not selected	PLAN	(3)	Spring 2023

### Choices on the Audit

In audit view if there is a choice requirement with no selected course or no pointer with the choice, then course will not pull up as planned in the audit.

For example, here it shows all core requirements have a "core pointer", so the pointer will show in the audit with the credits planned.



### Core Curriculum

IN-PROGRESS

Credits required: 42   Credits applied: 43   Catalog year: 2021-2022   GPA: 0.000

Course	Title	Grade	Credits
SEPOINTER COMMCORE1	Requirement		(3)
SEPOINTER COMMCORE2	Requirement		(3)
SEPOINTER MATHCORE	Requirement		(3)
SEPOINTER SCIENCECORE1	Requirement		(4)
SEPOINTER SCIENCECORE2	Requirement		(3)
SEPOINTER LANGCORE	Requirement		(3)
SEPOINTER ARTCORE	Requirement		(3)
SEPOINTER HISTCORE1	Requirement		(3)
SEPOINTER HISTCORE2	Requirement planned but choice not selected	PLAN	(3)

MATH 1314 or MATH 1324 or  
MATH 1325 or MATH 1332 or  
MATH 1442 or MATH 2413 or PHIL  
2303 or @ @ with 020  
Credits: 3.0

Pointer  
Mathematics Core Curriculum

#### Requirement Notes

Created on 06/24/2021  
Mathematics Core Course. Select a course not yet taken.

In this example you notice the choice was not given a pointer but is planned. This is because choices do not pull up on the audit until selected.

### Major in Spanish

INCOMPLETE

Credits required: 36   Credits applied: 6   Catalog year: 2021-2022   GPA: 0.000

**Unmet conditions for this set of requirements:**

- 36 credits are required. You currently have 6, you need 30 more.
- Minimum GPA unsatisfied
- Minimum Credits unsatisfied
- 12 credits in residence are required. You currently have 6, you need 6 more.

GPA of 2.0 is required; Your GPA is 0.000

Course	Title	Grade
<b>Still needed:</b>	2 Classes in <a href="#">SPAN 2311</a> or <a href="#">2312</a> or <a href="#">2313</a> or <a href="#">2315</a>	
Credit by examination may be used as a replacment.		
SPAN 3302	SPANISH COMPOSITION	PLAN
SPAN 3312	SPANISH GRAMMAR	PLAN
<b>Still needed:</b>	1 Class in <a href="#">SPAN 3303</a> or <a href="#">3311</a> or <a href="#">3317</a> or <a href="#">4320</a> or <a href="#">4327</a>	
<b>Still needed:</b>	1 Class in <a href="#">SPAN 3304</a> or <a href="#">3305</a> or <a href="#">3315</a>	

Spring 2024

Credits: 15.0

+

SPAN 3311 or SPAN 3303 or  
SPAN 3317 or SPAN 4320 or  
SPAN 4327  
Credits: 3.0  
Minimum grade: D

#### Requirement Notes

Created on 06/25/2021  
Linguistics & Oral Communication. Choose one course.

This last example shows the course planned on the audit because the choice was selected.



## Major in Spanish INCOMPLETE

Credits required: 36   Credits applied: 9   Catalog year: 2021-2022   GPA: 0.000

**Unmet conditions for this set**

GPA of 2.0 is required; Your G

Course
<b>Still needed:</b>
Credit by examination ma
SPAN 3302
SPAN 3312
<b>SPAN 3311</b>

**Requirement Notes**

Created on 06/25/2021

Linguistics & Oral Communication. Choose one course.

SPANISH PHONETICS

**Still needed:** 1 Class in [SPAN 3304](#) or [3305](#) or [3315](#)

**Spring 2024** ☐

Credits: 15.0

**+**

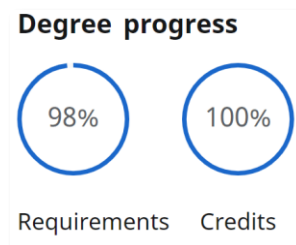
**Selected: SPAN 3311**

Credits: 3.0

Minimum grade: D

## Degree Progress

You may notice while in Audit View, even though all is "planned" in the audit, the requirements percent may not be 100%; this is because grades have not been processed (it is "in progress") so the percent is reduced to 98%.








## Calendar View

The **Calendar View** is the same as the "Plan Print View". You will access this view by selecting "print". This shows each students' plan by term in an easy to view side-by-side manner. You also have the option to print the active and locked plan or save as a PDF.





**Plans**   

Data refreshed   3:52 PM

## Ellucian University



**Student name** COB,Sample Student

**Plan Description** Doe, John A00000000 (SEP Plan)

**Tracking Status** 

**Active** Yes

**Status** Locked

**Last updated:** Sanchez, Mary Elizabeth on 06/22/2021








**Classification :** Sophomore

**Level :** Undergraduate



**Program :** Accounting, BBA


**College :** Business


**Major :** Accounting

Fall 2021	Spring 2022	Sum I 2022	Sum II 2022
 Credits: 12.0	 Credits: 16.0	 Credits: 6.0	 Credits: 0.0
<b>ECON 2301</b> MACROECONOMICS PRINCIPLES Credits: 3.0 	<b>ECON 2302</b> MICROECONOMICS PRINCIPLES Credits: 3.0 	<b>@FOREIGN LANGUAGE</b> Credits: 3.0  <b>@FOREIGN</b>	

**Print** 5 pages

**Destination**  Save as PDF 

**Pages** All 

**Layout** Portrait 



# Maintaining Templates

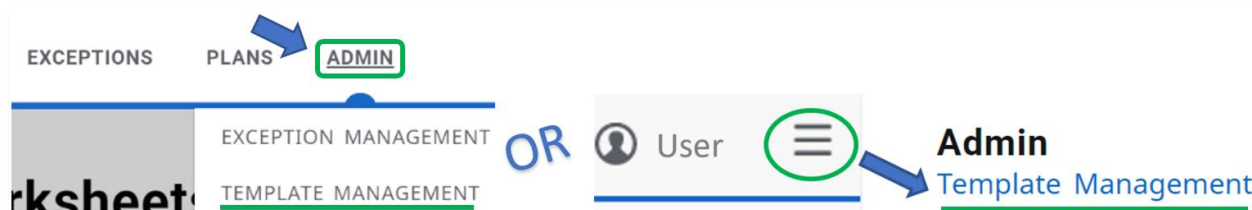
Templates will need to be updated in order to maintain compliance with the University catalog and curriculum standards. Senior Advisors will have access to Template Management in DegreeWorks Pre-Production environment and apply the necessary changes explained below. The roll out of new Templates will be scheduled by the DegreeWorks Team each catalog year and as needed per catalog changes.

Each catalog year the Department will work with Catalog and Curriculum Coordinator to make sure all is planned appropriately under “course sequencing” tab of the catalog.

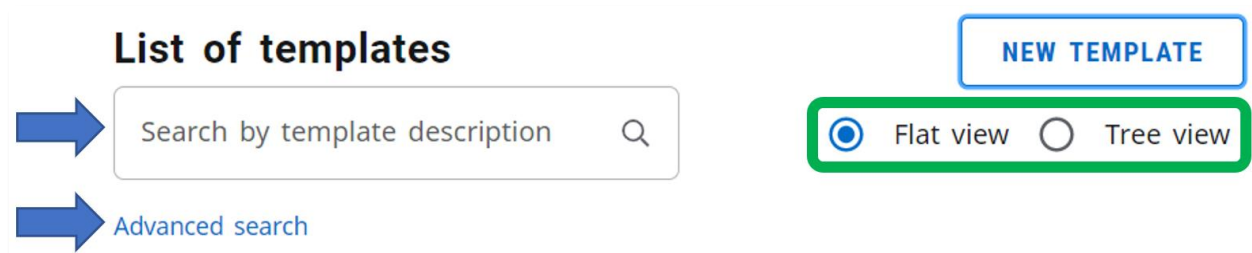


**Note:** Templates should be named according to College-Program-Major. Reference the Description Table for more information on how to name templates.

1. Access templates by logging into Degree Works Pre-Production and choosing 'Template Management'.



2. For new catalog year changes, it is advised to search the previous catalogs template. You can toggle between the flat view and tree view to help locate plans. You may also search templates with the “Advanced Search” or “Search by Template Description”.



3. Select the blue link on the desired template.



**List of templates**

Search by template description  
BU-BBA-ACCT

**NEW TEMPLATE**

☒ Flat view ☐ Tree view

Advanced search

Description ↑	Catalog year	Level	Degree	Major	College	Term scheme	ID	Who	What	Modified
BU-BBA-ACCT	2019	U	BBA	ACCT	BU	4_YR_FALL_START_____	T0000063	A03887292	DASH	04/15/2021
BU-BBA-ACCT	2021	U	BBA	ACCT	BU	4_YR_FALL_START_____	T0000342	A03887292	SEP	02/09/2021

4. On the template selected, you will click "Save as copy" and then save. The Description and course content can be updated later, just know it will be the template that says "- copy of".

Change term scheme Save as copy Delete template

**Save As Copy**

Please enter a unique template description.

Description \*  
BU-BBA-ACCT - copy of

CANCEL SAVE

5. Click the "Template list" and select the template you just created that has the Description and "- copy of".

TEMPLATE LIST NEW TEMPLATE

6. Select the pencil (next to the description) and update the description appropriately as well as the catalog year under "Required template tags"; if you notice any other tag that need correcting, you may update appropriately and select "SAVE".



## Edit Template

Description \*  
BU-BBA-ACCT

Template ID  
T0000342

Term scheme  
4\_YR\_FALL\_START

2021-2022  
2022-2023  
2023-2024

☒ Active

Required template tags

Catalog Year \*  
2021-2022

Level \*  
Undergraduate

Degree \*  
Bachelor of Busi...

Major \*  
Accounting

College \*  
Business

Optional template tags

Concentration

Minor

Campus  
Main - Corpus ...

Program  
Accounting, BBA

CANCEL SAVE

- a. While having the new [catalog](#) up and the summary of approved changes, make the necessary course or requirement changes to the template. Those templates with no changes, the new catalog year and description will be the only thing to update.

*\*\*\*Course changes (even those courses equivalent) will have to be updated manually for each program/template that had catalog changes.\*\*\**

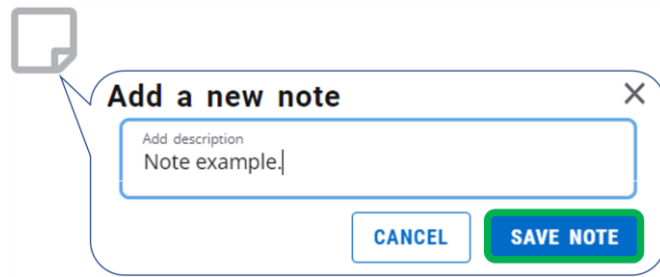
- b. For those courses that are equivalent, where the Prefix or Course Number Changed (e.g. UCCP 1101/1102-> UNIV 1101/1102, COMM 1321 -> COMM 3320, or HIST 3331 -> HIST 2301), the senior advisor will also update the equivalent course to the previous catalog year template (e.g. 2019). When advisors are just creating a plan for a student on a previous catalog year (e.g. student that is on 2019 catalog year), the plan will tell the student to take the current course now offered.

7. After DegreeWorks Team has scribed for the new catalog. To make sure all courses are planned, select a student with the same program and new catalog year, select "Plans" tab, click "Audit" link (located at top left of the plan above the "sidebar"), and double check all is



planned. This step is important to make sure no requirement was missed or planned as additional.

8. If you add a new note to a template, you may simply type the note and click "SAVE NOTE".



The DegreeWorks team will assist in creating all NEW templates. Our team also has a working document of all degree programs and their associated contacts for each college, if you would like a copy, please reach out to our DegreeWorks team.

**If there is a template that needs to be deleted, please contact the DegreeWorks Team.**

## Contact Information

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If you have questions or concerns regarding the SEP templates, please contact your college's Department Chairperson or Associate Dean before contacting the Registrar's office. All plans have been approved and submitted by senior faculty and require departmental approval before any changes can be made.

### SEP General Support

For any additional questions and concerns related to the SEP please contact us by email at

[DegreePlanner@tamucc.edu](mailto:DegreePlanner@tamucc.edu)

Mary Sanchez – Degree Audit Coordinator

Jessica Romero – Degree Audit Specialist

Levia "Lee" Marino – Degree Audit Specialist

Christie Roberts – Associate University Registrar

Missy Chapa – University Registrar

