



# DegreeWorks

Student Educational Planner

Advisor User Guide

Texas A&M University Corpus Christi

**PLAN  
ADVISE  
GRADUATE**



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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.

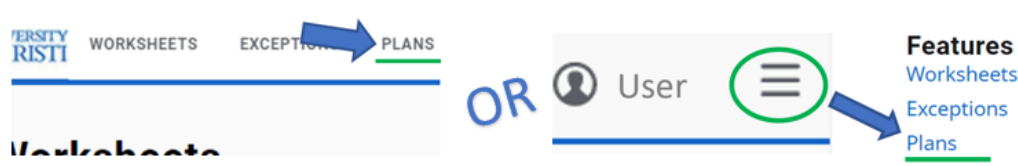
## Why use it?

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

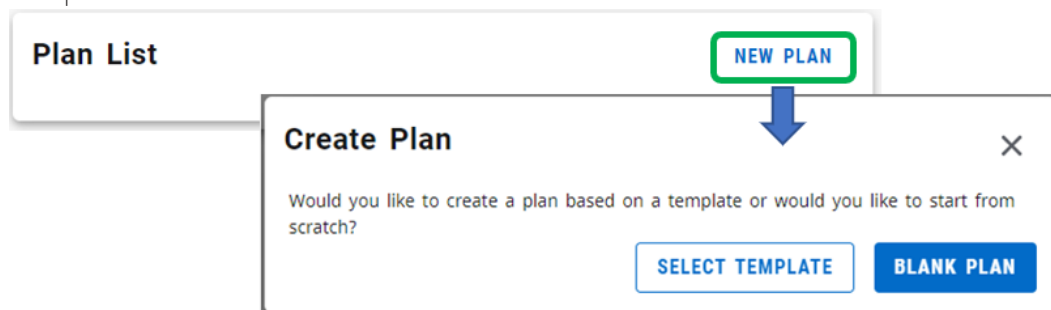
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1. Go to <https://dwprod.tamucc.edu:8471/DashboardServlet/>
2. Log in using your DUO mobile device
3. Select a student by either entering the student's ID or clicking "Advanced search" (below student ID).
4. Once you have selected a student, click 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.

- Add the current term when building a plan if the student is registered for courses. This will ensure if a student drops or doesn't complete a class the SEP will show the student off track.
- If a student changes majors, a new SEP should be created, beginning with the first semester of the newly declared major. The plan is forward looking and does not need to capture the student's entire academic history.

### 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

*It is recommended to 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  |
|-----------------------------|--------------|-------|--------|-------|---------|-------------------|----|
| <a href="#">BU-BBA-ACCT</a> | ✓ 2021       | U     | BBA    | ACCT  | BU      | ✓ 4_YR_FALL_START | AC |

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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. Another option if there is not an appropriate template for the start term, you may select your start term as the fall prior, then after adding template, review course requirements are appropriate for student's curriculum requirements.

⊘ 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 |
|-----------------------------|--------------|-------|--------|-------|---------|-----------------|---|
| <a href="#">BU-BBA-ACCT</a> | 2021         | U     | BBA    | ACCT  | BU      | 4_YR_FALL_START |   |

\*\*\*DESCRIPTION NOTE: Templates are named College-Degree-Major\_Catalog Year. Further descriptions are shown in the table below. As of upgrade to 5.0.5 sp2, SEP does not allow special

characters e.g. [ or { into the description. The description also cannot be the same name as a previous description given, simply add catalog year at the end of the description. See examples below.

Examples:

- BU-BBA-ACON - Online 2022
- BU-BBA-BURE - RELLIS 2022
- EH-BS-ELEM: Mathematics 4-8 2022
- LA-BA-THEA: Design/Technical (Odd Rotation) 2022

| Description | Concentration | Campus | Online | Specialized |
|-------------|---------------|--------|--------|-------------|
| Notation    | : Health Care | 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.

Naming convention – created plans should have the following naming convention:

Description \*

**SN-BS-ESCI : Environmental Health & Monitoring (MATH)**

↓

Start with program name in this format  
**College-Degree-Major**

↓

If there is a concentration, use **colon symbol** followed by **concentration name**.

↓

If there is a minor, list the minor code within the **parenthesis** at the end of the description.

**College-Degree- Major1/Major2 (Minor1/Minor2)**. Example: BU-BBA-MKTG/MGMT (INBU/ACCT). In this example, the “BU” indicates the college the student enrolled in; the “MKTG” major code to the left of the slash symbol is the student's first major; the “MGMT” major code to the right of the slash symbol is the student's second major (if applicable); data within the parenthesis represents the minors the student is pursuing; the “INBU” minor code to the left of the slash symbol within the parenthesis is the student's first minor (if applicable); the “ACCT” minor code to the right of the slash symbol within the parenthesis is the student's second minor (if applicable). If a major has a concentration use colon and spell out concentration e.g. SN-BS-ESCI: Environmental Health & Monitoring.



To edit Description, select the pencil. Under Description, remove the program name and change the description.

The screenshot shows a user interface for editing a plan. The main view displays the plan name 'BU-BBA-ACCT', the degree 'Bachelor of Business Admin', the level 'Undergraduate', and the tracking status 'NOT DISPLAYED, PLAN IS NOT ACTIVE'. A green box highlights the 'Edit plan' button, which is accompanied by a pencil icon. A modal window titled 'Edit Plan' is open, showing a 'Description \*' field containing 'BU-BBA-ACCT (INBU)', two checkboxes for 'Active' and 'Locked', and 'CANCEL' and 'SAVE' buttons. A red double-headed arrow points between the modal and the main view, indicating the connection between the two.

**Active and Locked Plans:** See below [“Editing Tools”](#) that will assist in editing the plan. Accurate Plans = Better Forecasting. 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.

Make sure to select the active and locked boxes after plan is set. Advisors will still have the access to edit a plan, even after the plan is active and locked.

Active  Locked

**BU-BBA-ACCT (INBU)** ✎ 📄 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 <span>📄</span>  | Spring 2022 <span>📄</span>   |
|---|--|
| <span style="border: 1px solid red; padding: 2px;">OFF-TRACK</span> Credits: 13.0 <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; text-align: center;">+</div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">             BUSI 0011<br/>Credits: 0.0           </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; text-align: center;">WARNING <span>📄</span></div> | <span style="border: 1px solid yellow; padding: 2px;">---</span> Credits: 13.0 <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; text-align: center;">+</div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">             ECON 2302<br/>Credits: 3.0           </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; text-align: center;">--- <span>📄</span></div> |

**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:

⊘ There was an error updating the plan. Sorry, the plan ✕ could not be saved because there is another active plan. Please mark one of them inactive then try again.

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   |
|--------------------|--------|------------|-------------------------|--------|-------|--|
| BU-BBA-ACCT (INBU) | Yes    | 06/18/2021 | Sanchez, Mary Elizabeth | BBA    | U     | Locked  |



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## 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/View notes** to the plan. To add a note, click 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.

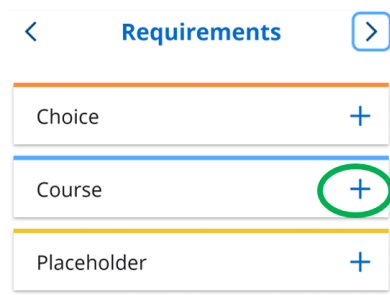
**Add terms** to the plan by clicking **ADD TERM**  in the plan header (displayed at the top right of the plan next to expand icon).


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 . 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". Instead of the plus icon, you may also simply drag the requirement to the term desired.




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.

## 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.



- 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.



- o 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 an 'Edit Requirement' window. On the left, there are two requirement cards, each titled '@FOREIGN LANGUAGE' with 'Credits: 3.0'. A blue arrow points from the three-dot menu of the top card to a 'Pointer' field containing 'Foreign Language 1'. Another blue arrow points from the three-dot menu of the bottom card to a 'Pointer' field containing 'Foreign Language 2'.

- o 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 an 'Edit Requirement' window. The requirement text on the left is: 'ACCT @ or BLAW @ or BUSI @ or ECON @ or FINA @ or MGMT @ or MKTG @ or MISY @ or OPSY @ or ORMS @ Credits: 3.0'. A blue arrow points from the three-dot menu to a 'Pointer' field containing 'Business Elective'. Another blue arrow points from the bottom right of the requirement card to a 'Requirement Notes' field containing: 'Created on 06/18/2021' and 'By Select elective course not already required in your major. Source Template'.

- o 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.

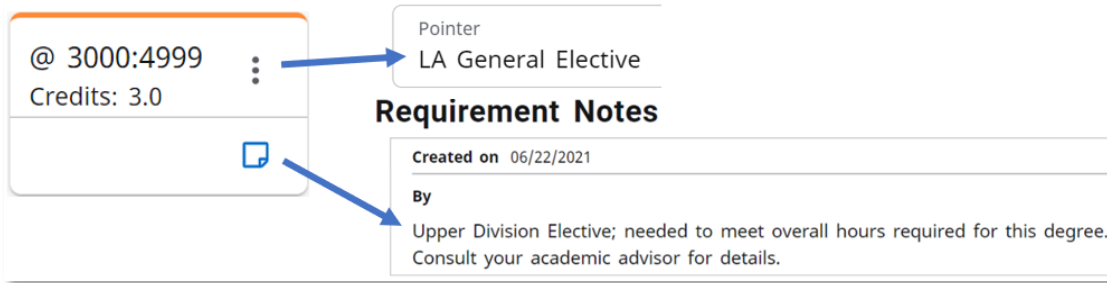


- If you select the three dots next to “@ @ with 090” and edit, you will notice under “Attribute” Component Area Option is selected, this is because many of the core courses can fulfill this area. The way we designate the Component Area Option is with the 090 attribute. Once an advisor knows what course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

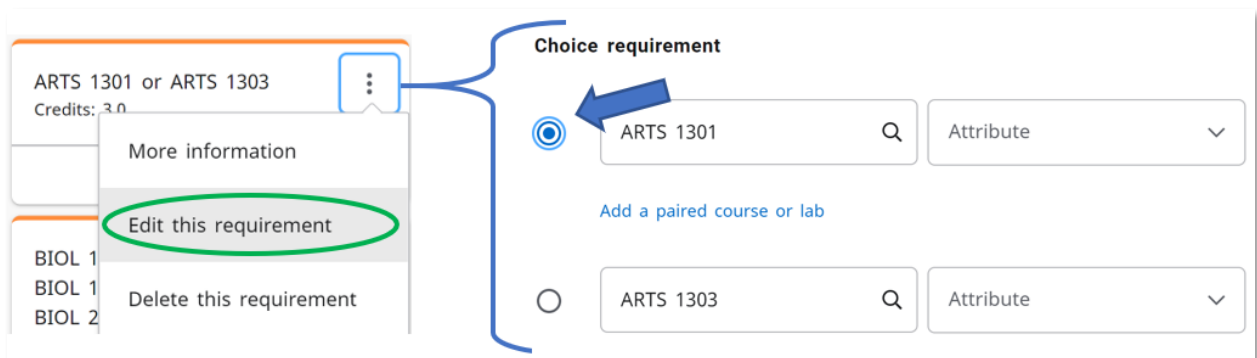




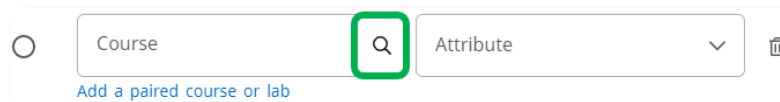
## How to Select a Course for Choice Requirement

**Best practice after student registers for a term:** When a student registers for classes in a term, it is best practice for an Advisor to review the plan, specifically any choices in the registered term, and make sure any choice requirement is modified/selected to reflect what the student registered for.

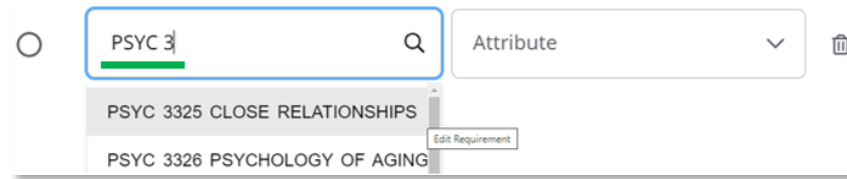
- When there are choice requirements, advisors will select/plan a course for the student by clicking “more”  icon.
- Click the radio  icon next to the desired course and select .



- 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.



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



If you select an option on the choice requirement, that selection will be used instead of the pointer. If nothing is selected on the choice requirement, the auditor will use the pointer instead and show that message.

### [SEP 5.0.5 Administration Guide](#)

## Scribe Pointers

Using Scribe Pointers, a Choice requirement on a plan can be linked to a rule in the student's requirement blocks. **When a Choice requirement on a plan has a Pointer assigned to it, if a selection hasn't been made then the auditor will apply a course to the associated rule. If a selection has been made on a Choice requirement then that option will be sent to the auditor instead.** If the Pointer is blank or a matching rule can't be found then the auditor will not apply the Choice requirement in the planner audit.

EXAMPLE (why course should be selected for choice requirement):

- "MARKETING ELECTIVE" choice requirement is planned for Spring 2023 semester.





### Student Educational Planner (SEP):

The screenshot displays the Student Educational Planner (SEP) interface. On the left, a sidebar shows the current semester 'Spring 2023' with 3.0 credits. Below this, a requirement card for '@MARKETING ELECTIVE' (3.0 credits) is highlighted with a blue box and a three-dot menu icon. A blue arrow points from this menu icon to the 'Edit Requirement' modal on the right. The modal shows the requirement type as 'Choice' and is not marked as 'Critical'. Under the 'Choice requirement' section, '@MARKETING ELECTIVE' is selected in a search box, with a blue arrow pointing to it. Below the search box is a link to 'Add a paired course or lab' and a 'CLEAR SELECTION' button. The modal also shows 'Credits: 3.0' and a 'Pointer' dropdown set to 'Marketing Elective'. At the bottom of the screen, a progress summary shows '3 Marketing Electives-9 Credits' and 'Still needed: 3 Classes in MKTG 3311 or 3325 or 3340 or 3345 or 4310 or 4340 or 4360 or 4396 or 4398'. This summary box is highlighted with a green border.

**Pointer requirements on students' worksheet point to this area:**

- When student enrolls in one of the options for the “Marketing Electives” choice requirement, for example, MKTG 4310, then the planned choice requirement with SEPPOINTER will take priority. If there is no course “selected” for the choice requirement, then both the enrolled course and planned choice with SEPPOINTER will show as options on the audit (see picture below); therefore, a choice will need to be selected when student enrolls for a choice requirement.



## Major in Marketing

SEE ADVISOR

Credits required: 24 Credits applied: 24 Catalog year: 2022-2023 GPA: 0.000

**Unmet conditions for this set of requirements:** Minimum GPA unsatisfied

Your TAMUCC Major GPA is 0.000; a GPA of 2.0 is required

|                                 | Course                     | Title  | Grade | Credits | Term        |
|---------------------------------|----------------------------|--|-------|---------|-------------|
| 3 Marketing Electives-9 Credits | SEPPOINTER<br>BU_MKTGELECT | Requirement planned<br>but choice not selected | PLAN  | (3)     | Spring 2023 |
|                                 | SEPPOINTER<br>BU_MKTGELECT | Requirement planned<br>but choice not selected | PLAN  | (3)     | Spring 2026 |
|                                 | SEPPOINTER<br>BU_MKTGELECT | Requirement planned<br>but choice not selected | PLAN  | (3)     | Spring 2026 |

## Electives

IN-PROGRESS

Credits required: 6 Credits applied: 9 Catalog year: 2022-2023 GPA: 4.000

|  | Course    | Title                           | Grade | Credits | Term        |
|--|-----------|---------------------------------|-------|---------|-------------|
| 1 Upper-Level Business Electives-3 Credits | MKTG 4310 | DISTRIBUTION SYSTEMS<br>IN MKTG | ENR   | (3)     | Spring 2023 |

An Upper Level Business elective is any 3000-4000 level course with a ACCT, BLAW, BUSI, ECON, FINA, MGMT, MKTG, MISY, OPSY or ORMS prefix that is not already going towards your degree.

- When a choice is selected when student registers, all will pull appropriately on "Planner Audit"; the enrolled course only that fulfills the Marketing Elective choice requirement.



## Student Educational Planner (SEP):

The screenshot shows the SEP interface. On the left, a semester selection for 'Spring 2023' with 15.0 credits is shown. Below it, a list of selected courses includes 'MKTG 4310' with 3.0 credits. A blue box highlights the three-dot menu icon next to 'MKTG 4310'. An arrow points from this icon to the 'Edit Requirement' dialog box on the right. The dialog box shows the requirement type as 'Choice', with a 'Critical' checkbox. Under 'Choice requirement', there are two entries: '@MARKETING ELECTIVE' and 'MKTG 4310'. The 'MKTG 4310' entry is selected with a radio button and has a blue arrow pointing to it. Below the dialog box, the 'Planner Audit' table is shown, with a green box highlighting the first row.

**“Planner Audit” after choice is selected:**

| Course                 | Description                                 | ENR  | Credits | Term        |
|------------------------|---|------|---------|-------------|
| MKTG 4310              | DISTRIBUTION SYSTEMS IN MKTG                | ENR  | (3)     | Spring 2023 |
| SEPPONTER BU_MKTGELECT | Requirement planned but choice not selected | PLAN | (3)     | Fall 2023   |
| SEPPONTER BU_MKTGELECT | Requirement planned but choice not selected | PLAN | (3)     | Fall 2023   |

## “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.

The dialog box titled 'Duplicate Requirement' contains the message: 'HIST 1301 already exists in this plan. Are you sure you want to add it?'. At the bottom right, there are two buttons: 'CANCEL' and 'ADD DUPLICATE'.



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.

The screenshot displays two identical requirement cards. Each card has a left sidebar with the text: "HIST 1301 or HIST 1302 or HIST 3331 or @ @ with 060 Credits: 3.0". The main area of each card shows: "Pointer American History Core Curriculum 1" (for the top card) and "Requirement Notes", "Created on 11/19/2020", and "American History Core Course 1 of 2. Select one course this term." (for the top card). The bottom card is identical but for "American History Core Curriculum 2".

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.

The screenshot shows two selected course cards. The top card is labeled "Selected: HIST 1301 Credits: 3.0" and the bottom card is labeled "Selected: HIST 1302 Credits: 3.0". Both cards have a blue square icon with a white document symbol in the bottom right corner.

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 |

## Additional Courses

Credits applied: 65 Classes applied: 25

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

# Scribe Pointers

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:

| Name (Key)   | Description                                      |
|--------------|--|
| 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:

| Name (Key)  | Description                     |
|-------------|---------------------------------|
| 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:

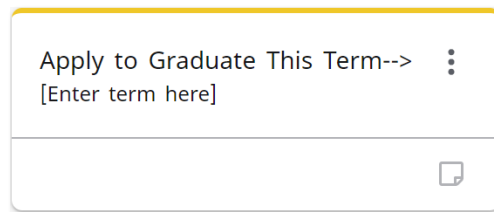
| Name (Key)    | Description                              |
|---------------|--|
| BU_ACTELECT   | Accounting Elective                      |
| BU_BUSIELECT  | Business Elective                        |
| BU_ECONSELECT | Economics Elective                       |
| BU_FINAELECT  | Finance Elective                         |
| BU_GENELECT   | Non-Business Elective                    |
| BU_HCELECT    | Health care Elective                     |
| BU_MGMTSELECT | Management Elective                      |
| BU_MISYSELECT | 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_CRIJSELECT | Criminal Justice Electives               |
| LA_GENELECT   | LA General Elective                      |
| LA_HISTELECT  | Upper-level History Elective             |
| LA_MUSIMUAP   | Music Principal Applied Studio           |
| LA_MUSIMUEN   | Music Major Ensemble                     |
| LA_PROAPELEC  | Media Production Applied Electives       |
| LA_PROELECT   | Media Production Electives               |
| LA_PURELEC    | Public Relations Prescribed Electives    |
| 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               |
| NH_GENELECT   | NH General Electives                     |
| SE_ATSSELECT  | ATSC Elective - SN                       |
| SE_BIMSELECT  | BIMS Elective - SN                       |
| SE_BIOSELECT  | BIOL Electives - SN                      |
| SE_MATHELECT  | Upper Division MATH Elective - SN        |
| SE_UPELECT    | ATSC Upper-Level Elective - SN           |
| SE_DESELECT   | Designated Electives - SN/EN             |
| SE_TESELECT   | Technical Electives - EN                 |



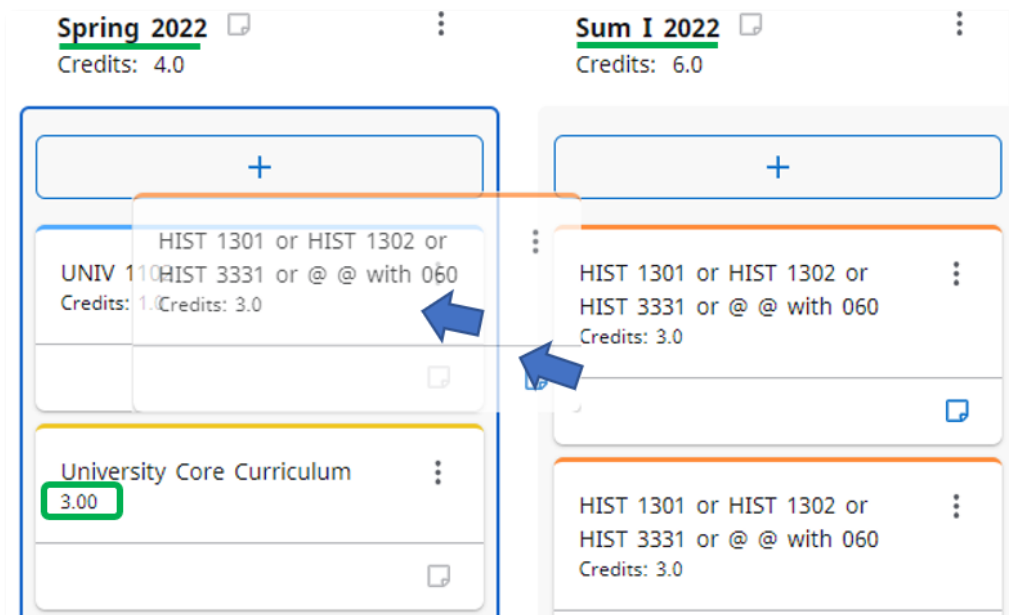
# Placeholders

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.



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.



\*\*\*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, make a plan active and locked, or deselecting these 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.*

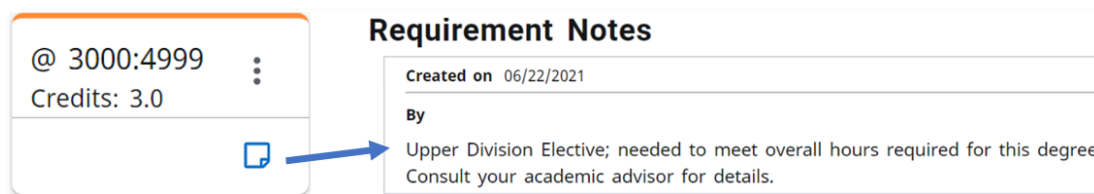
The screenshot displays the 'Edit View' for a plan titled 'BU-BBA-ACCT'. At the top, there are buttons for 'PLAN LIST' and 'NEW PLAN'. Below the title, the plan details are shown: 'Degree Bachelor of Business Admin' and 'Level Undergraduate'. The 'Active' status is 'No', 'Status' is 'Not locked', and 'Tracking Status' is 'NOT DISPLAYED, PLAN IS NOT ACTIVE'. A navigation bar includes 'Audit', 'Delete plan', and 'Save as copy'. The main area is divided into a left sidebar and a right main panel. The sidebar, titled 'Still Needed', lists 'Core Curriculum', 'Business Core Curriculum', 'Behavior in Organizations', and 'Major Field Test Review Co...'. The main panel shows two terms: 'Fall 2021' (Credits: 16.0) and 'Spring 2022' (Credits: 13.0). Each term has a '+', a list of courses (BUSI 0011 with 0.0 credits and ECON 2302 with 3.0 credits), and a copy icon.





## 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 shows a user interface for 'Requirement Notes'. On the left, there is a card for '@ 3000:4999' with 'Credits: 3.0' and a blue note icon. A blue arrow points from this icon to a 'Requirement Notes' panel on the right. The panel contains the following information:

|                   |  |
|-------------------|--|
| <b>Created on</b> | 06/22/2021   |
| <b>By</b>         | 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   |
| SEPPONTER COMMCORE2    | Requirement planned but choice not selected | PLAN  | (3)     | Spring 2022 |
| MATH 1324              | BUSINESS MATHEMATICS                        | PLAN  | (3)     | Spring 2022 |
| SEPPONTER SCIENCECORE1 | Requirement planned but choice not selected | PLAN  | (3)     | Spring 2022 |
| SEPPONTER SCIENCECORE2 | Requirement planned but choice not selected | PLAN  | (3)     | Spring 2023 |
| SEPPONTER LANGCORE     | Requirement planned but choice not selected | PLAN  | (3)     | Sum I 2022  |
| SEPPONTER ARTCORE      | Requirement planned but choice not selected | PLAN  | (3)     | Sum I 2022  |
| HIST 1302              | U.S. HISTORY SINCE 1865                     | ENR   | (3)     | Fall 2021   |
| SEPPONTER 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   |
| SEPPONTER COMPCORE1    | Requirement planned but choice not selected | PLAN  | (3)     | Fall 2022   |
| SEPPONTER 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)     |
| <u>SEPOINTER MATHCORE</u> | 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 without a pointer until course is selected. Please refer to "How to select a course for choice requirement" (previously mentioned) area when student registers for a course that will fulfill a choice requirement.

**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 0.

GPA of 2.0 is required; Your GPA is 0.000

| Course               | Title   | Grade |
|----------------------|---|-------|
| <b>Still needed:</b> | <b>2 Classes in</b> <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 replacem.  |       |
| SPAN 3302            | SPANISH COMPOSITION   | PLAN  |
| SPAN 3312            | SPANISH GRAMMAR   | PLAN  |
| <b>Still needed:</b> | <b>1 Class in</b> <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> | <b>1 Class in</b> <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 it shows the course will plan on the "Planner Audit" because a course was selected for the choice.

**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**

**Still needed:**

Credit by examination ma

SPAN 3302

SPAN 3312

SPAN 3311

**Requirement Notes**

**Created on** 06/25/2021

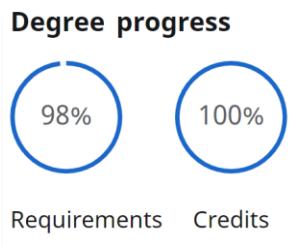
Linguistics & Oral Communication. Choose one course.

SPANISH PHONETICS PLAN

**Still needed:** 1 Class in SPAN 3304 or 3305 or 3315

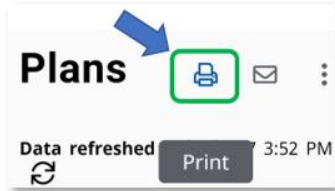
## Degree Progress


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.



**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                                   |
|--|--|---|---|
| <input type="text" value="..."/> Credits: 12.0   | <input type="text" value="..."/> Credits: 16.0   | <input type="text" value="..."/> Credits: 6.0   | <input type="text" value="..."/> Credits: 0.0 |
| <b>ECON 2301</b><br>MACROECONOMICS<br>PRINCIPLES<br>Credits: 3.0<br><input type="text" value="..."/> | <b>ECON 2302</b><br>MICROECONOMICS<br>PRINCIPLES<br>Credits: 3.0<br><input type="text" value="..."/> | <b>@FOREIGN<br/>LANGUAGE</b><br>Credits: 3.0<br><input type="text" value="..."/><br><b>@FOREIGN</b> |   |

Print 5 pages

Destination

Pages

Layout

# Maintaining Templates

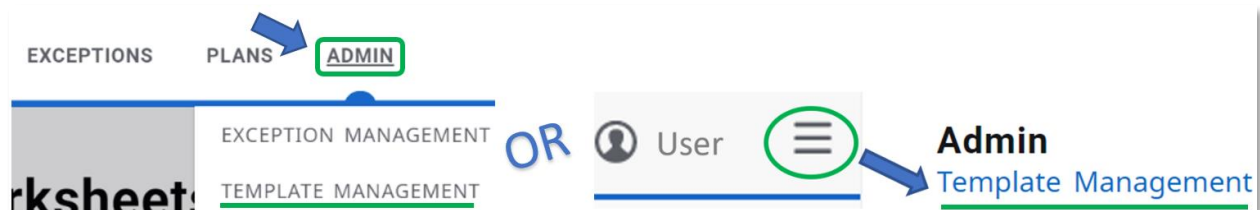
Templates will need to be updated in order to maintain compliance with the University catalog and curriculum standards. Senior Advisors will have access to Template Management in DegreeWorks Pre-Production environment and apply the necessary changes explained below. The roll out of new Templates will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

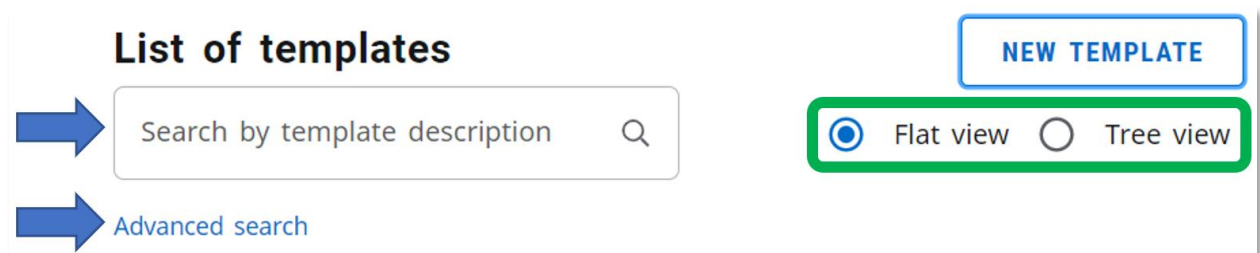


**Note:** Templates should be named according to College-Program-Major. Reference the Description Table for more information on how to name templates.

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** [NEW TEMPLATE](#)

Search by template description  
BU-BBA-ACCT ×

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”.



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.\*\*\**

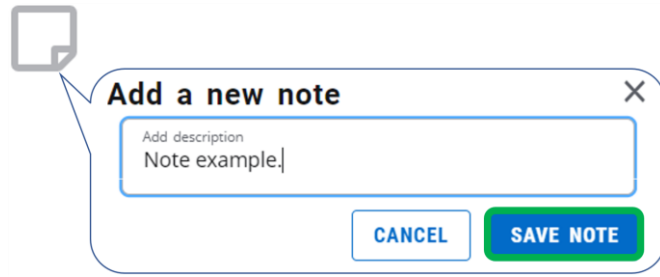
- b. For those courses that are equivalent, where the Prefix or Course Number Changed (e.g. UCCP 1101/1102-> UNIV 1101/1102, COMM 1321 -> COMM 3320, or HIST 3331 -> HIST 2301), the senior advisor will also update the equivalent course to the previous catalog year template (e.g. 2019). When advisors are 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

Samantha Prater – Degree Audit Specialist

Christie Roberts – Associate University Registrar

Missy Chapa – University Registrar

