Academic Planner Instructions

What follows are basic instructions on how to navigate Academic Planner, as well as possible sequencing and management of the process. You ultimately control the sequencing and management, so these are merely suggestions of a work-flow that is a good solution.

Academic Planner How To…

1. Log on to https://my.augie.edu
2. Click on Faculty and Staff Tab
3. Click on **Academics** (Left side bar)
   a. Academic Planner Training Videos can be found on this page
   b. Course Listings can also be found on this page if you want to search for available courses for the upcoming term(s).
4. Click on **Advising** (Left side bar)
5. Search for your student(s) from the list of options or type in the student ID number and click Get Plans. Click on the radio button by the plan you want to look at, and click View Plan.

NOTE: Search for all plans that say "Pending Advisor Approval" as these are the plans you need to review as soon as possible. Plans currently appear in alpha order by Plan Status. *If at all possible, only approve ONE plan per student.*

Once the plan is open:
Transfer credit and Pre-Matriculation credit can be found under "Other Credits"
        AUGIE course (Transfer course) (credits)
For the remainder of the academic plan:
Definitions:
CR = Course has been taken and credit has been earned
IP = Course is currently in progress (registered for it right now during the current semester)
R = Registered, but the course has not yet begun
blank = In previous terms, the course was planned but not taken, or credit was not earned
blank = In future terms, the course is planned

Red X = Course/Requirement is not satisfied
Yellow Triangle = Course/Requirement is in the plan, but has not been completed
Green Checkmark = The course/requirement is complete

Tabs on the bottom:
Holds & Warnings:
This area will let you know if a pre-requisite has not been met, if the student is below 12 hours (Full time) or if the student has made changes since a previous approval of the plan.
Comments:
You can leave a comment (brief) for your student
Approvals:
Ignore for now – nothing appears here.

The right sidebar is the degree audit. If you see errors here, notify the registrar's office immediately, as it is the same data that would appear in the Degree Audit you find in other areas of Advising.

If all areas of the right side bar have yellow triangles, that means the student has planned each course that is needed to earn the degree. If areas remain with the red X, investigate and discuss with the student what needs to be done to satisfy that requirement.

Recommended Advising Process:

1. Approximately 2-3 weeks prior to registration week, follow your normal procedure for asking your advisees to sign up for a time to meet with you.

2. In your communication with advisees, encourage them to look at their academic plan, and make any necessary corrections to the current term, and to complete the plan for the following term (or as many terms into the future that they are able to plan).
   a. You can determine how you want students to notify you if a plan has been submitted for approval. We are working to have this be an automated email that the system would generate to you, but in the meantime, you either need to go to Academic Planner to check for Pending Advisor Approval Plans often, or you need to ask your advisees to email you once they have requested approval.
   b. The more you encourage students to plan into the future the better. Future planning allows us to use this tool for planning of demand for sections.

3. Prior to meeting with your advisee, it is suggested that you review their academic plan. You can decide if you would rather approve prior to meeting, or wait for your meeting with the student to approve the plan.
   a. If you approve the plan PRIOR to your meting the student will be able to build a schedule for the upcoming term using the planner. You can ask the student to bring a printout of the schedule with them to the appointment.
      i. We are working on getting a link to the schedule for advisors… this is an update to come sometime into the future!

4. After meeting with the student you need to follow two steps:
   a. Make sure the plan is approved, or that the student knows what needs to be done so you can approve the plan
   b. You also need to grant clearance to each student so they have access to register.
      i. My.augie.edu / Faculty and Staff Tab / Academics on left side / Advising on left side / the portlet just below Academic Planner is the advising portlet.
      ii. Change Advisee Status to Need Registration Clearance
      iii. Check the Term to make sure it is set to Fall 2014 (or the term to clear)

   Advisor: Krueger, Joni L. ▾
   Advisee Status: Need Registration Clearance ▾
   ID:
   Last Name:
   First Name:
   Course Program: Undergraduate Program ▾

   Term: FA 2014 ▾
   Search   Advanced Search

      iv. You can either enter a specific ID number and/or name, or you can simply click Search to look at all of your advisees.
      v. Click on the GRANT button and they will have clearance to register for that term.

Reviewing Academic Plans:

1. The first step in reviewing a student's submitted academic plan is to look at the right hand side …
   a. Click to expand Plan Options – double check what the student has built their plan for – including majors, minors and concentrations.
   b. Look at the Holds/Warnings tab at the bottom for a warning that the majors/minors might not match what is in the system. If not a match, have the student fill out a change of major form with the Registrar's Office
2. Next, look at the Overall Audit – number of hours earned and planned.
   a. **There is an error – any current IP (In Progress) courses are not included in this total. Add the Earned + Planned, find IP and that is the total.**
   b. Students graduating December 2014 or later will need 124 hours instead of 130.
3. Skip down to the major and minor audits next. Look to see if the courses are planned in the sequence your department recommends.
   a. If not, perhaps it is easiest to print out the plan and make notes on it to go over with the advisee.
   b. If there are missing requirements, make note and go over with the student
   c. If you have suggestions of different courses to take to satisfy the major/minor make note of that as well.
4. Once the major/minors look good look at the General Education Audit.

One trick again, is looking at the total hours. DO NOT look through the degree audit and add up each course noted there, as some courses end up being on the audit more than once, and you will end up double counting credit hours. Rather, look at the note on 2.a. for how to total hours. Another way to do this is to open Other credit and take the total at the top, and then look at each term and total them up and see if that matches your total for 2.a.

Overall, my note to you is this … consider academic planner the same as how you used to do advising, just online versus pencil and paper. It allows the student more accuracy for courses that are sequenced as well as those that are less frequently offered. It also allows us to have that information stored, so hopefully we can use it for prediction of demand.