Create a Plan From a Degree Audit

STAY ON YOUR PATH AND GRADUATE ON TIME

Create a personalized term by term plan of the courses that will complete your program requirements and help you stay on track to graduation.

Plan directly from your degree audit. Plans can also be built from multiple program audits, allowing you to add minors, concentrated studies, etc.

This guide will show you on how to create a plan from a degree audit. Connect with an academic advisor at your campus for help with picking a major or minor, class schedules, internships, and more.

Steps to Log In: How to Log into Minnesota State Student Planner

Minnesota State Student Planner is the web-based student planning system that includes Audits, Plans, and Schedules and can be accessed through your eServices account on any device connected to the internet.

Select the Plans tab

Minnesota State is an affirmative action, equal opportunity employer and educator.
On the Manage Plans page you will see one Program and Catalog year listed.

The Program and Catalog year listed is the program/major that has the Rank of 1 on your student record. To change your major, contact your registrar/student records office.

If your Degree Program is Undecided in your student record, the Program listed will be ‘No Declared Program’ and the Catalog year will be the current term. To change your major, contact your registrar/student records office.

My Plans

The My Plans table includes all the plans that have been created for that student. In My Plans you can mark a plan as Preferred, select a plan to Edit, and select from additional options under the Action dropdown menu.

Preferred

Only one plan can be marked as Preferred. The filled star icon indicates which plan is the Preferred plan. The Preferred plan is the plan that can be Locked/Approved and is also the plan used for the data in Reports.

Edit Plan

To open the plan you want to edit, select the plan name or Edit Plan under Action.
### Action

Select the Action you want to perform for that plan, from the dropdown list of choices:

- **Edit Plan** - opens the plan so you can edit
- **Rename**
- **Copy**
- **Delete** - this choice is not available for the Preferred plan

### NOTE:

Students start with no plans listed under My Plans. Once plans have been created, all plans can be deleted except one, which will be your Preferred plan. You cannot delete your Preferred plan.
Naming Your Plan
Since many different plans can be created, it can be helpful to include specific information in the plan name. Ask if your college or university has a naming convention or recommendation.

Create a New Plan for a Declared Program/Major
Select the Create a New Plan link tab.
1. Enter Plan Information: **Plan Name**, **Term** and **Year** in which the Plan should start, and **Years to Graduation**.
2. Select Add Plan.

Create a New Plan for a Different Program/Major
Select the Create a New Plan link tab.
1. Select the **Select a different program** link under your Program. It will open the **Request an Audit for Plan** page.
2. Select a **Program** and **Catalog Year** from the dropdown menus.
3. Enter Plan Information: **Plan Name**, **Term** and **Year** in which the Plan should start, and **Years to Graduation**.
4. Select **Next**.
Plan Builder

**Step 1:** Select a course to view more details about that course.
**Step 2:** Drag the course into the appropriate Term on your Plan.
**Step 3:** Use the ‘check’ Plan button to check your Plan against the audit to ensure requirements are fulfilled as needed.

**Ways to Add Courses to a Plan**

1. Select course to open Course Catalog Details from degree audit, **Select Term**, **Select Add Course**.

2. Select and **drag** the course from the degree audit and **drop** it on the term.
3. Select the **Add Course** button under any term. Enter course department and number.

Courses can also be moved from one term to a different term. Continue adding courses until you are done creating the plan.

**Check the Plan**

Select the checkmark icon at the top of the plan to check planned courses against the audit.

Check against the degree audit to make sure requirements are being fulfilled

- When a plan is checked, it validates against the audit.
- It’s a good idea to **check often** to make sure courses are applying where you intended.
- The audit is rerun to reflect how planned courses apply to your program.
- Make sure you are satisfying program requirements and where planned courses may be completing more than one program requirement.

**Planned courses will display as PL in purple on the Audit Side:**
View an Audit that includes all courses from the plan:

This opens an audit in a new tab and allows you to continue planning while viewing an audit.

Editing a Plan

On the term line, select the Edit Term button on the right side to open the edit functions.

Removing Courses From Your Plan Term

1. Check the box to the right of the course(s) that you want to delete.
2. Select All to delete all courses in the term.
3. Select Delete. You will be prompted to confirm the deletion.
4. Select Submit to save your changes.
Course with Variable Credits

- Variable credit courses show as zero credits on a Plan.
- Edit Term to enter the correct number of credits.
- Select Submit to save your changes.

Completed Audit Requests

Every time a plan is opened, an audit runs for the plan that is opened. When you go to the Manage Audits area in the Audits tab, the degree audits that were run in Graduation Planner will display the planned course icon and contain the word ‘planner’ in the Run By column:

When you open an audit that contains planned courses, the planned courses will display in purple.
Notations on the Plan and Course Catalog Details

If a course displays with a red circle with a minus \(-\) it is an alert there may be an issue with planning this course. Hovering your cursor over the red circle will give you a reason.

In this example MGMT 300 displays as not offered Spring 2021. This may be because:
- the school has not rolled the schedule for that term yet or
- the course will not be offered Spring 2021

Select the course to open the Course Catalog Details for more information.

Course information displaying in the Course Availability grid reflects which courses are on the rolled course schedule in eServices for the term listed.

If available, using Offering Frequency information can help you know in which term(s) the course is usually offered. In this example, Offering Frequency tells us that the course is usually offered Fall – All Years, Spring – All Years, and Summer – All Years.

It was known that the school had not yet rolled the Spring 2021 schedule, so the course was left on the plan. Every time a Plan is opened, Course Availability is updated and reflected on the Plan and in the Course Availability grid, so when the schedule has rolled, this will update. View Courses & Registration in eServices to verify the availability of a course.
Prerequisites and Corequisites

When a Prerequisite or Corequisite is both Enforced and Displayed in curriculum management, it displays in eServices in Course Details under Prerequisites (Courses and Tests).

Prerequisites and corequisites in our system are very complex and can include several kinds of test scores and multiple measures which is great for students. Unfortunately, because of our complexity, prerequisite and corequisite functionality does not work in the Plans application.

When a Prerequisite or Corequisite is both Enforced and Displayed, a message will display in Course Catalog Details referring the user to the most accurate source of information which is eServices: “See Course details in eServices for Prerequisite information”.

Prerequisite information may also be included in the Description. If it is, it can be seen in the Course Catalog Details in the Minnesota State Student Planner and the Course Details in eServices.
Approved Plan and Approved Term(s)

On the Manage Plans page

Some schools use the Approval option. Approving/locking can be activated by staff/faculty/advisors.

Preferred Plan: The plan that the student will follow to complete their program. Approving/Locking can only be done by staff on the Plan that is marked as Preferred.

Approved Plan

The notation Plan Approved and additional information displays on the Plan Side of Plan Builder in the approved plan.

An approved plan is indicated by the locked icon in Manage Plans.
Approved Term(s)

The notation **APPROVED** displays next to the approved term on the Plan Side of Plan Builder.

If a term or terms have been approved but the plan has not been approved, there is no indication of an approved term on the Manage Plans page.

Legend for Icons Used in Plan Builder

The blue circle ‘i’ icon is not used in our configuration. Students are directed to “See Course details in eServices for Prerequisite and Corequisite information”.
Plan Side Icon Descriptions

View an Audit: This audit opens in a new tab and allows you to continue planning while viewing an audit.

View PDF: Displays in-progress plan as PDF.

See Associated Roadmap: When the icon is gray, there are no associated roadmaps. When the white icon is selected, it turns gray and lists any associated roadmap(s). To return, select Associated Roadmaps again.

See Completed Courses: Displays plan on left and completed coursework on right. To return, select See Completed Courses again.

GPA Calculator: Displays plan on left and ability to plan GPA on right. To return, select GPA Calculator again.

Comments: Displays plan on left and allows you to read/make comments on right. To return, select Comments again.

Check Plan against Degree Audit: Validates plan against audit and checks term availability.

Remove All Courses: Removes all planned courses.

Add Term to Plan: Adds a new term to a plan.