

Creating the First Plan

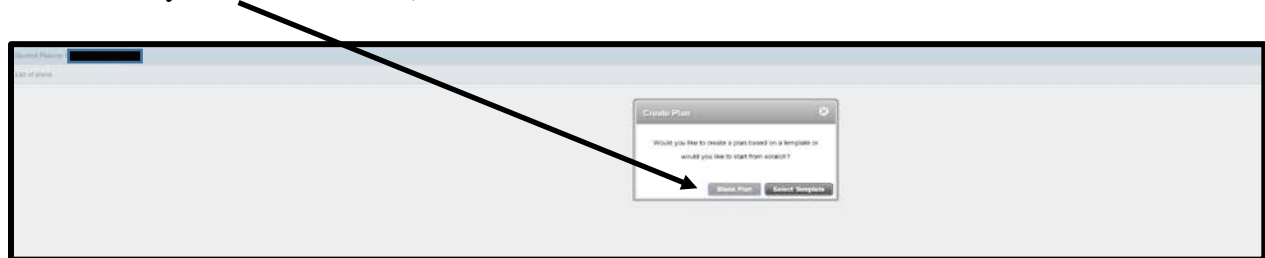
Choose the “Plans” tab.



***Note** if the student already has a plan the following screen will display. In order to create a New Plan from this screen, click “New Plan” in the right hand corner.



If the student does not have a previous plan, the following screen will display. You will then click “Blank Plan” to create a plan. (Note: If you are interested in Templates for your college, reach out to your Dean’s Office).



Steps to finish creating the plan

1. Type a “Description” for the plan. *This is the name of the plan and should reflect the degree(s) included and the academic/catalog year.* (Please be as detailed as possible and avoid naming conventions such as Plan A, Plan B, etc.)
2. Select the “Active” box, to make the new plan active.
3. Select the “Locked” box, to lock the new plan (**Note:** Reports are going to be ran off locked/active plans only).
4. Select Degree Type from Degree Drop down list (**Note:** Only applicable to students that have declared multiple degree types i.e. CERT, AAS, BS etc.)
5. Click “Save” in the bottom right hand corner.
6. Identify the terms until graduation by using the “Add term” (+) button.

