



Ellucian Degree Works™

University of
La Verne

*My*Degree Tracker

Student Educational Planner (SEP)

STYLE MANUAL FOR TEMPLATE BUILDERS

Office of Academic Advising and Registrar

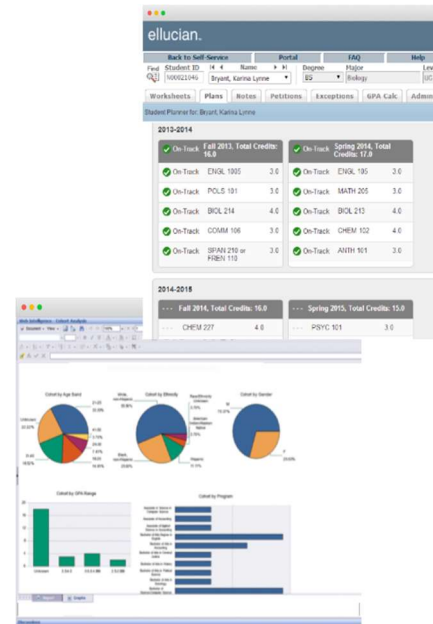
Authored by:
Dr. Carlos Cervantes
Associate Dean

v. 3.0
(Spring 2022)

What is a Student Educational Planner (SEP)

The Student Educational Planner (SEP) is a multi-year degree completion plan that is part of Degree Works, an online degree audit module that replaces CAPP. At the University of La Verne we renamed Degree Works to MyDegree Tracker (MDT). SEPs help students and academic advisors to design a multi-year degree completion plan that makes sense to both parties. SEPs help students to be decisive and forward-looking about completing academic requirements in a timely and sequential order by helping them to take only the courses they need and avoid those they do not. SEPs help students stay on track for graduation, saving time and money while assisting academic advisors to minimize errors.

Most importantly, SEPs help academic advisors to collaborate with advisees to develop plans that are unique to the student while also aligning these with departmental academic expectations.



SEPs, when active and accurate, may help department chairs and deans to anticipate course needs and demands in advance with accurate predictive reports. For example, the math chair can run a report against SEP data to determine how many students plan to take Math 104 in fall semester. The math chair can meet the real needs of students, saving time and instructor resources while doing so.

WHY DO WE NEED THIS MANUAL?

This manual guides authorized SEP users to build templates that have been approved by academic departments and follow a standardized format in areas where unified institutional messages need to be conveyed to students and academic advisors. Students and academic advisors will have great latitude and flexibility in adjusting existing templates that are unique to each student. Standardizing notes across all majors and to all students will help to share important information to students and advisors that will enhance the advising process toward degree completion, improving the advising experience, and minimizing errors.

WHO HAS ACCESS TO SEP?

All academic advisors and degree-seeking students will have access to SEPs. Once students or academic advisors download a copy of the appropriate template to the student's MyDegree Tracker account, courses can be edited, deleted, or moved to reflect the individual needs of students and academic advisors. However, only a select number of administrators in the Registrar, Office of Academic Advising, Graduate Academic Services, and ROC will have administrative access to create, design, or delete major department-approved SEP templates.

LOGIN TO MYPORTAL

On the left margin of MyLaVerne portal, under Launchpad banner, locate the Quicklinks menu, and click on the “Degree Audit” link.

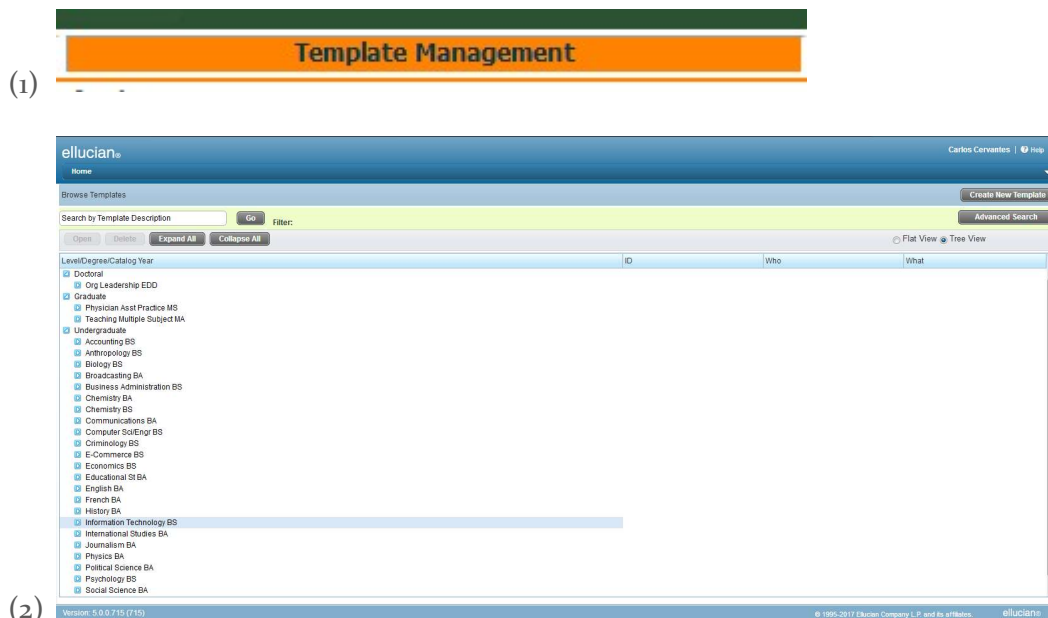


Click on the MyDegree Tracker (MDT) option to launch it.

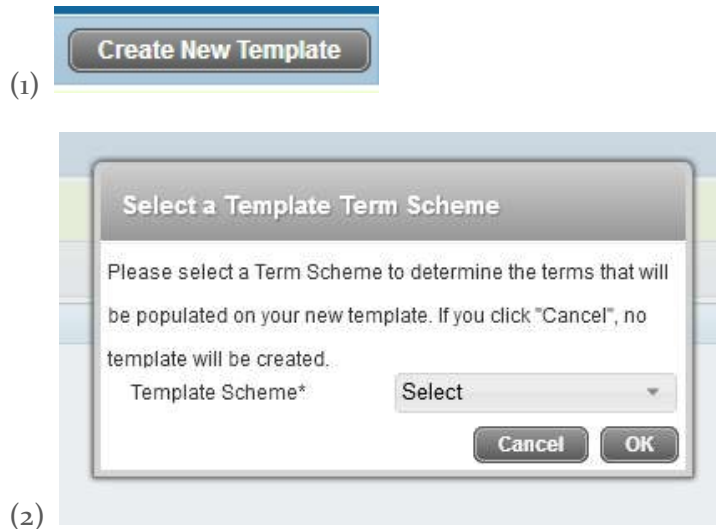


BUILDING SEP TEMPLATE

Super user [or Approved Staff] will see the “Template Management” tab on the top banner. Click on (1) “Template Management” tab to enter the templates (2) “home.”

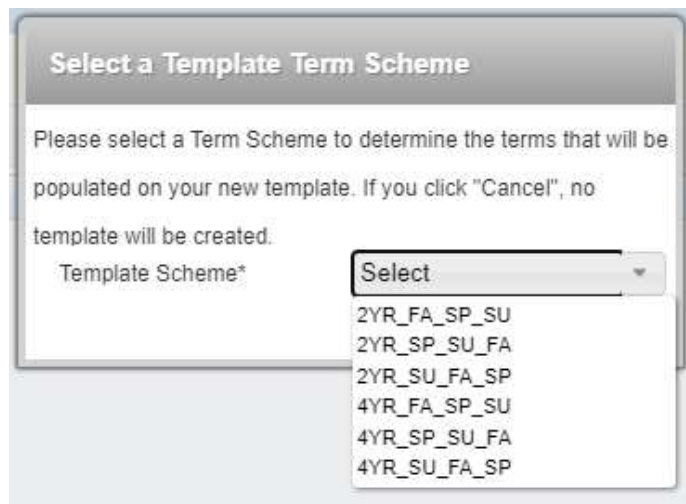


Select “Create New Template” button (1) to launch the “Template Term Scheme” (2).



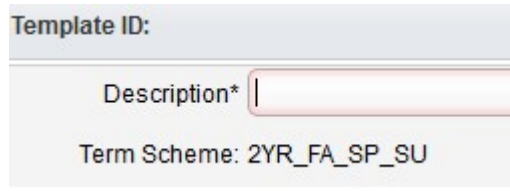
Select a Template Term Scheme, be mindful of ROC vs TUG (CAPA may use TUG or ROC templates):

- “4YR_FA_SP_SU” or “2YR_FA_SP_SU” (SEP starting in fall semester, includes spring and summer terms for each of 2-or-4 academic years).
- “4YR_SP_SU_FA” or “2YR_SP_SU_FA” (SEP starting in spring semester, including summer and fall terms for each of 2-or-4 academic years).
- Select desired “Template Scheme” and press OK.
- Template Schemes: FA = Fall Term; SP = Spring Term + Intersession; SU = Summer Term.



TEMPLATE FORMATTING

Template ID: TXXXXXXX (ID numbers are automatically assigned and cannot be reused after templates have been deleted).



A screenshot of a form with a light blue header bar containing the text "Template ID:". Below the header is a white input field with a red border and a vertical cursor. To the left of the input field is the label "Description*". Below the input field is the text "Term Scheme: 2YR_FA_SP_SU".

Description: Name Template using the format and examples below to ensure there is uniformity in the template names.

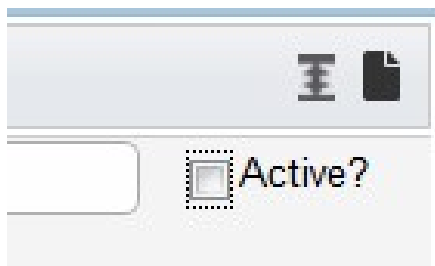
The description includes:

- The degree type (BA or BS or MA or MS, etc.).
- The student population (TUG or Adult [ROC/CAPA] or Graduate).
- The template type (2-year or 4-year).
- The “start” term (Fall or Spring or Summer). [Intersession is included in Spring term].
- The catalog year (CY) reflecting the fall term year. The catalog year may include an open-ended date, “2017-LATER” or a single year (“CY 2017”), or truncated date ranges (CY 2017-2020).

Examples:

- Bachelor of Arts: “BA MajorNAME TUG 2YR Fall Start, CY 2xxx”.
 - “BA MajorNAME TUG 2YR Spring Start, CY 2xxx”.
- Bachelor of Science: “BS MajorNAME Adult 4YR Fall Start, CY 2xxx”.
 - “BS MajorNAME Adult 4YR Spring Start, CY 2xxx”.

Active?: Check mark allows the template to go “live” (viewable to advisors and students). Leave unchecked if the template is in draft.



A screenshot of a form with a light blue header bar containing a bold "I" icon and a document icon. Below the header is a white input field with a red border. To the right of the input field is a checkbox with a dotted border and the text "Active?".

Required Template Tags

Level: Select class level.

Catalog Year: Select the year for the template that is being built.

Degree: Select degree type.

Required Template Tags

Level *	Select	Degree *	Select
Catalog Year *	Select		

OPTIONAL TEMPLATE TAGS



Skip.




SAVE TEMPLATE

SEP TEMPLATE (OVERVIEW)


The template will show semester rows starting with Year 1 Fall, followed by Year 1 Spring, and closing with Year 1 Summer. Fall, spring, and summer banners will show for every subsequent academic year. The extra semesters beyond the 2-and-4YRs is by design to give students and advisors “extra” semesters if individual students cannot complete a degree in exactly 2 or 4-years, respectively. The student or advisor can delete any of the extra terms they do not need. The sum total of semester hours (called “Credits” in templates) will show to the right of the semester block name. For example, Fall Sem Yr 1 shows 18.0 “credits” and Spring Sem Yr 1 shows 14.0 “credits”. The unit counter can be incomplete depending on the requirement option that is selected (more on this in the next section on “*Add Requirement*” Options and Definitions).

▶ Fall Sem Yr 1	18.0
▶ Spring Sem Yr 1	14.0
▶ Summer Sem Yr 1	0.0

To the right of the semester rows, you will see  and  buttons and a page icon 

▶ Fall Sem Yr 1	18.0	  
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Select  to “add requirement” in a desired semester block. See “*Add Requirement Options and Definitions*” for brief descriptions of each choice type.



Select  to delete a course (ACCT 301 as highlighted in blue) from a semester block.

Fall Sem Yr 1 18.0						
Critical	Course Requirement		Credits	Minimum Grade	Campus	Notes
<input checked="" type="checkbox"/>	ACCT 301		4.0	None	None	
<input type="checkbox"/>	ACCT 308		4.0	None	None	



The page icon  allows authors to type brief notes.

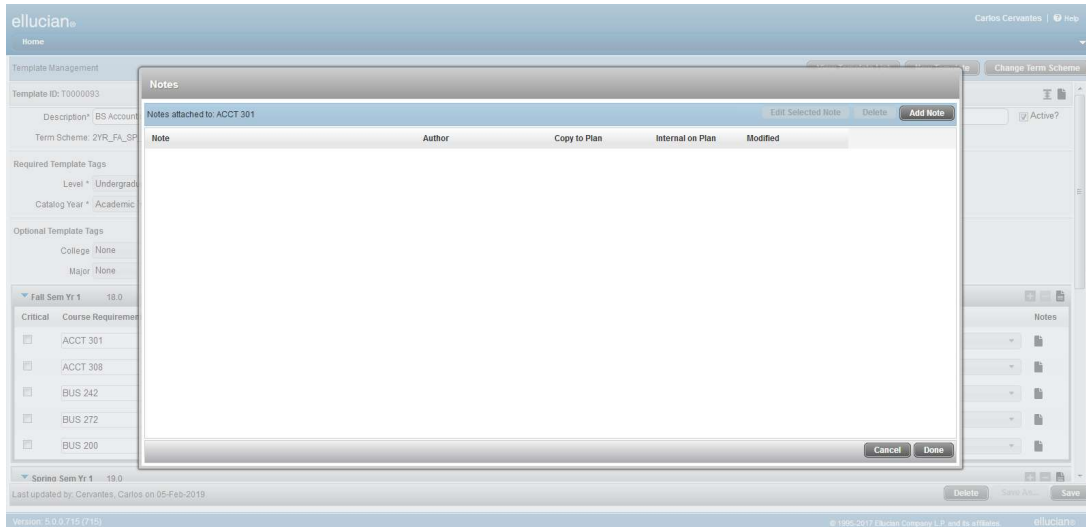
- A solid page icon  is blank;
- A page icon with lines  indicate that a note exists.

There are three types of notes in a template:

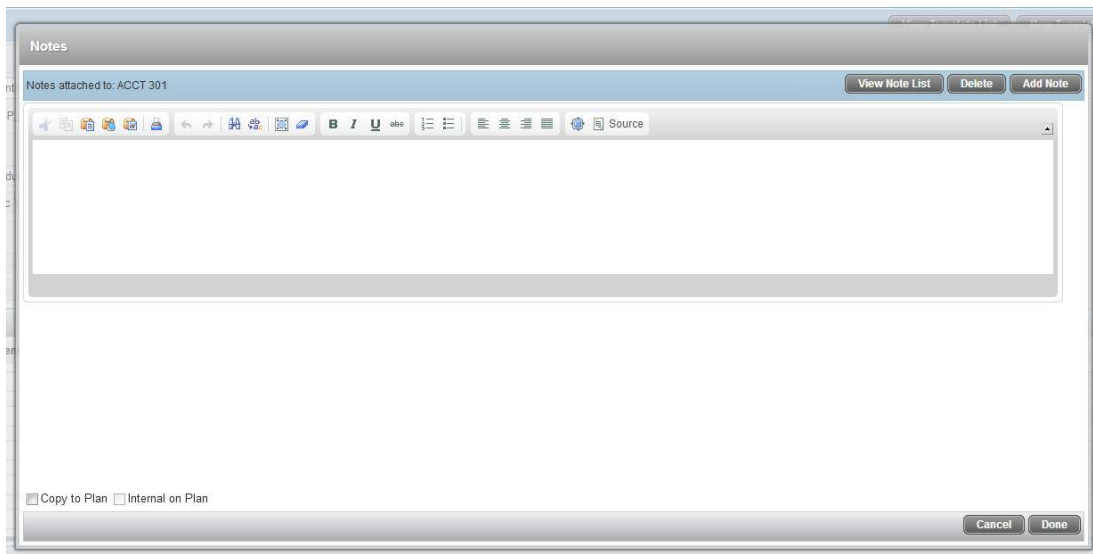
- 1) Notes for the entire template,
- 2) Notes for a semester block, and
- 3) Notes for specific courses.

Adding a Note

Determine the type of note you want to create (template, semester, or course level). Click on the solid page icon  to add a new note. Click on the page icon with lines  to edit an existing note. Either way, a Notes popup page will show.




Click on Add Note to show the notation editing column and box. Type the note—be brief—that you want to convey to ALL students and advisors. Check “Copy to Plan” on the bottom left corner. If the note is not intended for students then you should check “Internal on Plan.” Click on Done to create the note or Cancel to close the box without saving the note. See section “SEP PREFERRED COMMENTS...” for preferred standardized notes.



POPULATE SEP TEMPLATE BY SEMESTER BLOCK

Before populating semester blocks, make sure you have named the template and that all applicable notes have been typed at the template or semester block levels.

Select  to “add requirement” in a desired semester block. See “*Add Requirement*” *Options and Definitions* section for brief descriptions of each choice type.



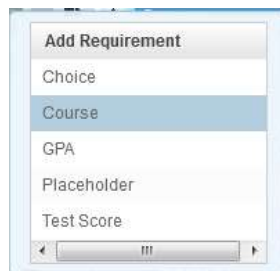
Critical	Course Requirement	Credits	Minimum Grade	Campus
<input type="checkbox"/>	PLSC 100	4.0	None	None
<input type="checkbox"/>	PLSC 301	4.0	None	None
<input type="checkbox"/>	PLSC 371	4.0	None	None

Select  to delete any option chosen from the “Add Requirement” options (as highlighted in blue) from a semester block.






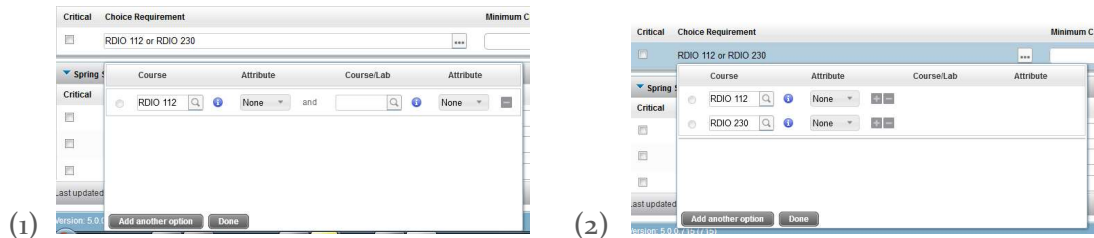
Critical	Course Requirement	Credits	Minimum Grade	Campus	Notes
<input type="checkbox"/>	ACCT 301	4.0	None	None	
<input type="checkbox"/>	ACCT 308	4.0	None	None	

“Add Requirement” Options and Definitions




- Add Requirement
- Choice
- Course
- GPA
- Placeholder
- Test Score

Choice: Allows the author to select a lecture course that (1) are paired with a lab or (2) gives choice between two or more courses. Use combination of  or  or “Add another option” to add or remove course requirements. Use  to search Banner catalog for specific course(s). Courses that do not exist will trigger a “course ‘XXX’ is not valid” error. *The sum total of “Credits” for the “Choice” option will show to the right of the semester name when you save the template.*



From left to right: check off “Critical” if a course is important in the chosen semester block, enter minimum “credits” (semester hours) (if desired), select minimum grade (if desired), and select a campus (if desired).

Critical	Choice Requirement	Minimum Credits	Minimum Grade	Campus	Notes
<input checked="" type="checkbox"/>	RDIO 112 or RDIO 230		None	None	

Course: Creates an existing course requirement from Banner catalog. Type the course “name, space, number” (JOUR 100); Credits (semester hours) will automatically fill [if a course is semester hour variable then “credits” will not automatically fill]. Leave blank Minimum Grade and Campus (advisors and students can customize these fields), add a course-specific notation in Notes (if desired). If the course is misspelled or does not exist, it will show an error message. You can also search the course using the magnifying glass icon  to search by course name (SPAN 100) or Title (Elem Spanish I). *The sum total of “Credits” for the “Course” option will show to the right of the semester name when you save the template.*

Critical	Course Requirement	Credits	Minimum Grade	Campus	Notes
<input checked="" type="checkbox"/>	JOUR 100	4.0	None	None	

GPA: Option includes a “GPA Requirement” for “Major GPA”. Users may add “Minimum GPA” and “Class List”. Users can add narrative in “Notes”. *This option will not count toward the sum total of “credits” for a semester block.*

Critical	GPA Requirement	Major	Minimum GPA	Class List	Notes
<input checked="" type="checkbox"/>	Major GPA	Select			

May also select Overall GPA (with no Class List option). May include “Minimum GPA” and narrative in “Notes”.

Critical	GPA Requirement	Major	Minimum GPA	Notes
<input type="checkbox"/>	Overall GPA	Select	<input type="text"/>	

Placeholder: Creates placeholder requirements in wildcard status from the dropdown menu for general education, elective course, or comment. *This option will not count toward the sum total of “credits” for a semester block.*

Placeholder Requirement
Select
<div> <div>Select</div> <div> Any General Education or Elective course Comment General Education: Any GE course General Education: Creative Expression (LVCE) General Education: Humanities (LVHU) General Education: Life Science (LVLS) General Education: Lifelong Wellness (LVLW) General Education: Oral Communication (LVOC) General Education: Physical Science (LVPS) General Education: Quantitative Reasoning (LVQR) General Education: Social Sciences (LVSS) </div> </div>

Value: Creates a space for comments that are associated with chosen Placeholder Requirement. The Value space has character limits. A Value notation is required even if a “Note” is not included for this entry. May include a narrative in Notes.

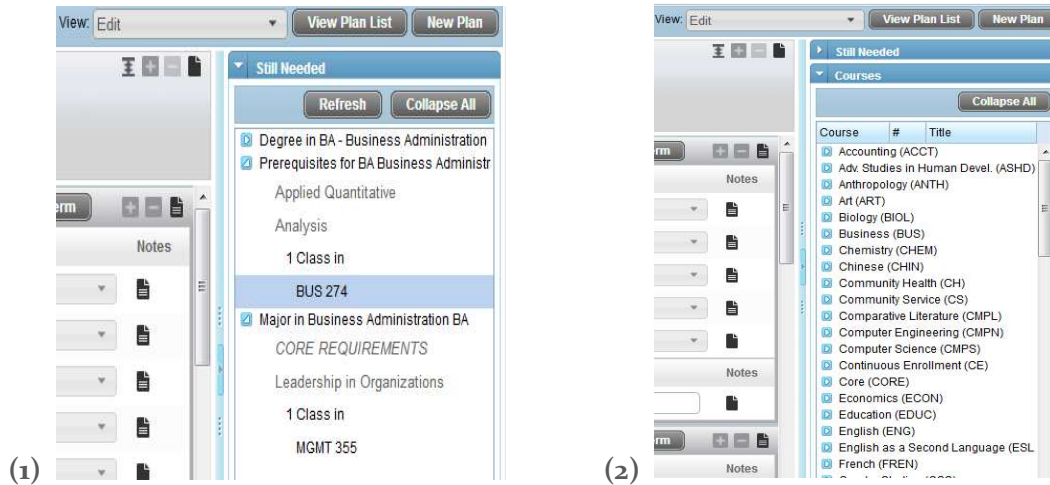
Value	Notes
<input type="text"/>	



Test Score: Allows the author to select a test score requirement. Select Test Score Requirement if one exists for a program. Type a Minimum Score. May also include a notation in Notes. *This option will not count toward the sum total of “Credits” for a semester block.*

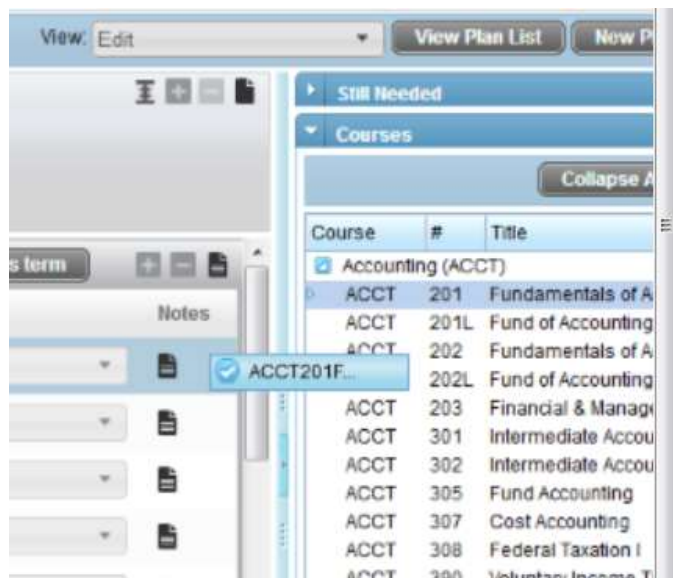
Critical	Test Score Requirement	Minimum Score	Notes
<input type="checkbox"/>	Select	<input type="text"/>	

SEARCHING FOR COURSES

In the “Edit” view of the SEP, users can search for courses in Banner catalog. Users can also narrow course searches by viewing courses that are “Still Needed” (Pic. 1), or all active courses in Banner catalog (Pic. 2).



On either “Still Needed” or “Courses”, click on the blue icon  to expand and view  course options below each major option. Narrow the search to a specific course, select the course (in blue), drag and drop into the desired semester with your PC mouse.



Plan Tracking in Templates

Template authors should look for courses that departments have deemed “critical” in a specific semester or term. Requirements that are “critical” should have the “critical” box checked.

▼ Spring Sem Yr 1	12.0
Critical	Course Requirement
<input checked="" type="checkbox"/>	WRT 111


Critical: This option is available on all requirements. An active, locked, plan will display an asterisk (*) next to a course that is deemed “Critical”. Only critical requirements will make a term or plan “off-track.” Advisors and students should meet, agree on a completion agreement, and edit the SEP plan to match the agreement.

 Off-Track * HSTY 415

What Students and Advisors See: Off-Track, On-Track, & Warning.


Active, locked, SEPs have three tracking levels: Off-track, On-track, and Warning. All “Add Requirement” options, except “Placeholders”, will show a tracking level once a semester has begun.

On-Track: A green ribbon and “On-Track” note alerts the advisor and student that a requirement is in-progress or is met.

Tracking	Critical	Course Requirement
 On-Track		<u>HSTY 200</u>

A red ribbon icon and an “Off-track” notice alerts the advisor and student that: (Pic. 1) the student is not following the course plan for a specific semester, or (Pic. 2) the student is not or has not taken, withdrew, or failed a “critical” course. Advisors and students should meet to revise the template to match the student’s new circumstances.

(1)  Off-Track Fall 2018, Total Credits: 10.0

(2)  Off-Track * HSTY 415

Warning Ribbon: A gray ribbon icon and “Warning” notice will display next to a non-critical requirement that has not completed.



A blue icon with a small “i” in a blue circle is hyperlinked at (1) the semester block level, and (2) every course. These icons are hyperlinked to course description(s) for all courses in a semester or to a specific course within a semester, respectively.



Semesters that have not started or have no critical requirements will not be tracked until the term starts. Tracking will not initiate until/unless a plan is active and locked.

Example A shows Fall 2019 semester as captured in spring 2019. No tracking takes place if a semester has not started.

Example A:

Fall 2019, Total Credits: 16.0					
Fall Full-Time Standing: 12-18 semester hours (SH). Take the required block of courses called the Integrated Business Curriculum Program (BUS 330, BUS 360, BUS 390, MGMT 300). See academic advisor for details.					
Kechichian, Michelle 2019-02-20 09:55:25					
Tracking	Critical	Course Requirement	Minimum Grade	Campus	Credits
		BUS 330	C-	Main Campus	4.0
		BUS 360	C-	Main Campus	4.0
		BUS 390	C-	Main Campus	4.0
		MGMT 300	C-	Main Campus	4.0


Example B shows Fall 2018 semester as captured in spring 2019. Tracking is active for a past semester, showing a combination of tracking ribbons.

Example B:

Off-Track Fall 2018, Total Credits: 10.0					
Full-time standing: 12-18 semester hours (SH).					
Cervantes, Carlos 2019-02-20 15:17:19					
Tracking	Critical	Course Requirement	Minimum Grade	Campus	Credits
Warning		HSTY 310			4.0
Warning		LVE 200			2.0
LVUV (SoLVE): Junior transfers should take within the first year of enrollment in consultation with advisor.					
Cervantes, Carlos 2019-02-20 15:17:19					
On-Track		HSTY 315 or HSTY 320 or HSTY 350			4.0

SEP PREFERRED COMMENTS ON NOTES AND PLACEHOLDERS

To ensure that messaging to students and academic advisors is uniform across the colleges, ROC campuses, and among specific majors, it is important to follow a standard format. Academic advisors may add new notes to individual student SEPs. Students can add their own notes but cannot delete Template or advisor notes.

The Template comments on NOTES  should be limited to the following options for Traditional Undergraduate SEP templates (**DO NOT COPY/PASTE from this document because hidden Word scripts will negatively affect the function of MyDegree Tracker**). *ROC templates might deviate from these comments and may be included in a future version of this guide:*

Recommended Template-level Notes. TUG Notes are used as an example (may be edited to fit specific student populations):

- Valid for all TUG students on catalog year(s) listed.
- Enroll in math and writing until LVQR and LVWB are met.
- Writing (WRT) changed to "RCS" in fall 2019.
- Full-time standing: 12-18 SH in fall/spring semester; 5 SH max in Intersession.
- If in Honors, ADD HNR 111, drop RCS 110, drop Studio.
- RCS 110 (w/ or w/out Studio based on placement).
- Replace "Placeholder" entries with specific courses when you decide on a course.
- If foreign language or math are not needed, replace with needed courses.

Recommended academic term Notes. TUG Notes are used as an example (may be edited to fit specific student populations):

- Second Term Junior Year (fall or spring): "Apply for graduation with Registrar."

Use the following questions as guide points when working with department-approved templates:

- Does the major department expect students to do a specific task in a specific semester that is important to the major?

Use semester-based Notes to type the task. For example, Educational Studies desires students to take the CBEST in January (which is part of spring semester). In Notes, they say "Take CBEST in January."

- Does the major department expect students to take a specific course in a specific semester?

Select “Course” from the “Add Requirements” option (+ button), select “Course” then check “Critical” box if critical. Type course or search using the magnifying glass icon. May type in Notes: “Strongly advised by program/department.”

- Does the major department use a major course to satisfy an La Verne Experience attribute such as LVE 400 or 305?

If yes, use “Course” from the “Add Requirements” option. Open the Notes icon and type the attribute that is fulfilled by the course. For example, SOC 497 satisfies a major requirement but also satisfies the La Verne Experience general education attribute of “community service”. Thus, in Notes for SOC 497, you would write “LVCS”.

- Does the major department include a La Verne Experience General Education (GE) course with an attribute included? Alternatively, do you know that a specific GE course on a template satisfies a GE attribute?

If yes, use “Course” from the “Add Requirements” option. Open the Notes icon and type the attribute that is fulfilled by the course. For example, SOC 250 satisfies a major requirement but also satisfies the La Verne Experience GE Social Science Breadth requirement. Thus, in Notes for SOC 250, you would write “LVSS”.

- Do you have a minimum grade students must earn for specific courses? Select the “minimum grade” when a specific course is chosen from the + icon in a specific semester.
- Unless you have a specific need to identify the campus, keep “none” as the option.
- All juniors (fall or spring): “Apply for graduation with University Registrar.”

KNOWN ISSUES

- Only locked and active SEPs can be tracked for reporting purposes.
- Students may only have ONE active and locked SEP.
 - Students cannot delete active or locked SEP.
 - If two SEPs exist as “locked” then this will cause a system error resulting in advisor, student, and administrator-generated errors preventing edits, updates, or deletions. OIT solutions require baseline code deletion of at least one of the two locked SEPs. User solution to avoid the error requires that the advisor delete or unlock the “old” SEP before locking the new SEP.
- Students may have unlimited inactive and unlocked SEP drafts.

- Students may delete inactive and unlocked SEP.
- Academic advisors can edit/add notes in templates once they have been assigned to individual students.
- Students cannot edit or delete template notes.
- Academic advisors should select the desired SEP template from the mater list and attach it to the student audit. Then, the advisor and student should review the copy of the chosen template and edit their copy in consultation with each other. Once an SEP reflects a student/advisor preference, the academic advisor should make the SEP active, at minimum, and locked at best.
- Notes on placeholders do not show on student Notes view. Semester level Notes replace placeholder Notes on Notes view. It is a known bug by Ellucian. We hope that future SEP updates will fix this bug.
- SEP cannot count accepted transfer semester hours or AP credits. [Work-around: advisors can include grand total transfer units in an individual student's Notes icon at the first-semester of enrollment].