

Student Educational Planner

The Student Education Planner feature in the Degree Works degree audit system allows students and advisors to build 4-year plans for completion of a bachelor's degree while incorporating any other requirements into the plan for minors and cohort designations (i.e. GLI, Honors, etc.). This feature also allows advisors and students to view a degree plan at the same time as a degree audit to compare the two and verify that every degree requirement is reflected in a student's plan.

Getting Started (STUDENT)

1. Login to DegreeWorks by logging in to [CyberBear](#). Click on "Student Services" and then click on "DegreeWorks" located in the black ribbon on the left side of the page under your student profile picture. Now your screen should look like this:

The screenshot shows the University of Montana Degree Works interface. At the top, there is a navigation bar with "FAQ", "Template Management", and "Log Out". Below this is a search bar with fields for Student ID, Name, Degree (BA), Major (Communication Studies), Level (01), Student Class Level (Sophomore), Last Audit (01/20/2021), and Last Refresh (Today at 3:14 am). The main content area has tabs for "Worksheets", "Plans", "Notes", "Petitions", and "GPA Calc". The "Plans" tab is active, showing a "Student View" for student A000AH1 as of 01/20/2021 at 03:57. The student information table is as follows:

Student	College	Catalog Year
[REDACTED]	College Humanities & Sciences	2020-2021
ID	Degree	Academic Standing
[REDACTED]	Bachelor of Arts	[REDACTED]
Confidentiality Indicator	Major	Institutional GPA
N	Communication Studies	[REDACTED]
Advisors	Minor	Total Credits Earned
[REDACTED]		[REDACTED]
Cohort	Concentration	Class Standing
MATHP	Organizational Communication	[REDACTED]
Campus		
UM-Msl		

2. From this screen, click on the Plans tab located underneath your name and next to the Worksheets tab, then click on "Blank Plan" when the system prompts you to create a plan. Now your screen should look like this:

The screenshot shows the University of Montana Degree Works interface with the "Plans" tab active. The "Student Planner for" section shows a "Description" field, a "Degree" dropdown set to "Bachelor of Arts", and a "Tracking Status" of "Not displayed, plan is not active". A warning message states: "This field may not be empty or contain only spaces." Below the form is a disclaimer: "Disclaimer: You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript."

3. Add a description for your plan.
 - a. Example 1: if your degree is "BA in Communication Studies", your description for this plan might be "Communication 4-year plan"
 - b. Example 2: if you are thinking about studying abroad but aren't yet sure you might choose to make your description be "Communication Studies, Study Abroad" and then you might create a second plan in which the description is "Communication Studies, No Study Abroad"

- c. Example 3: if you are trying to choose between majoring in Philosophy or Political Science you might have one plan with the description “Philosophy” and your second degree plan “Political Science”

Student Planner for: [redacted] View: Edit View Plan List New Plan

Description: [empty field] This field may not be empty or contain only spaces. X

Degree: Bachelor of Arts

Tracking Status: Not displayed, plan is not active

Disclaimer: You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.

4. Click the box next to “Active”.

Student Planner for: [redacted]

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

5. Click “Save” in the lower righthand corner of the screen. As you continue building your degree plan, click save often.

Audit What-If Delete Save As... Save

Adding Semesters

1. To add a semester, click on the plus sign and add a term (located to the right of where you typed in your description for your plan- see circled red in screen shot below). Using this plus sign, you can add all the future semesters to your plan that will be required to complete your degree.

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [redacted] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Disclaimer: You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.

Adding Courses

Now that you have added a semester or multiple semesters, you can start adding requirements and electives to complete your degree plan.

1. Add classes to your plan by searching for specific courses. You may do this by clicking on the plus sign on the righthand side of the semester that you are planning.

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [redacted] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

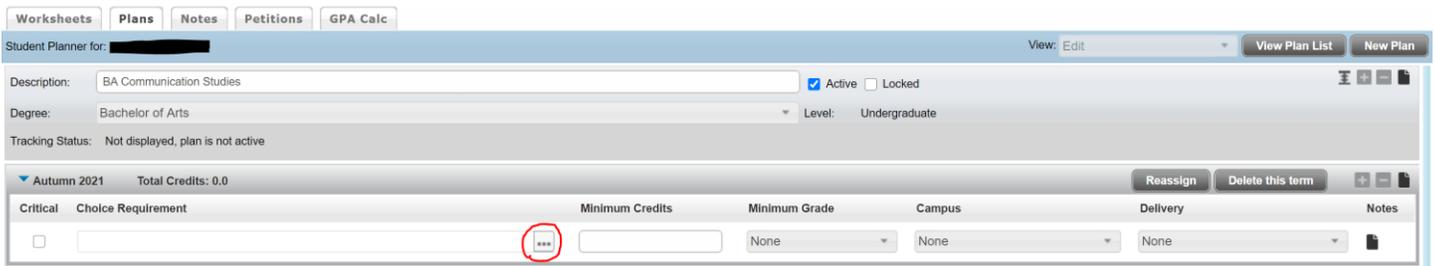
Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

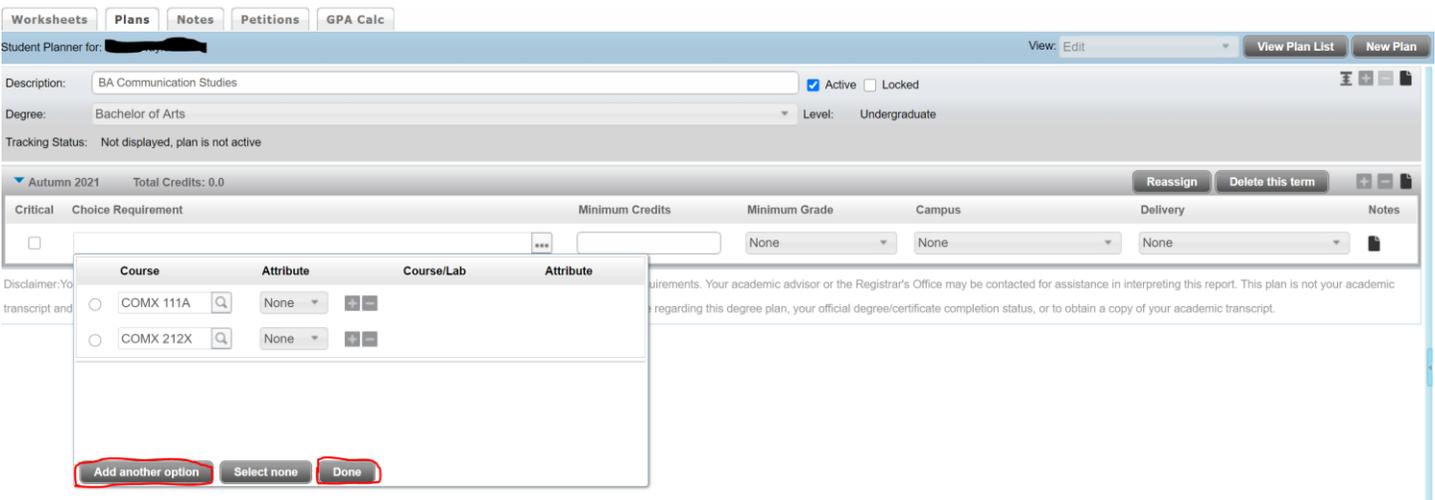
Autumn 2021 Total Credits: 0.0 Reassign Delete this term +

Now you have some options as to what type of requirement you would like to add:

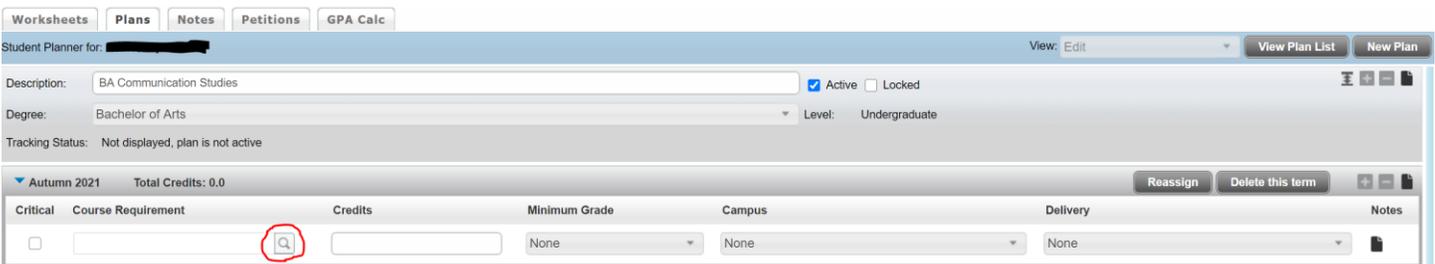
A. Choice Requirement- choose this option if you are trying to choose between two or more different courses to take. If you choose this, click on the blank box that appears under the semester after you click on “choice”. Now your screen should look like this:



Search for the two courses (or more) that you will choose between by clicking on the ellipsis tab, which will open a course search box. Select the magnifying glass tab to the right of the “Course” fields to search your course options. To add more courses select “Add another option” at the bottom left of the course box. After you have made your choice course selections, select “Done” to close your search.



B. Course Requirement- Used for selecting one course you plan on taking whether it is a requirement or an elective. This is the most commonly used feature for degree planning and is the requirement option you want to utilize in order to be able to run a review of your plan against your Degree Works degree audit. Click on the magnifying glass under Course Requirement to search for a course.



I searched for ANTY 101H and added it to my plan (see screenshots below):

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [Redacted] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Autumn 2021 Total Credits: 3.0 Reassign Delete this term

Critical	Course Requirement	Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	ANTY 101H	3.0	None	None	None	

Disclaimer: You are tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and does not guarantee that you will meet the requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [Redacted] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Autumn 2021 Total Credits: 3.0 Reassign Delete this term

Critical	Course Requirement	Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	ANTY 101H	3.0	C-	None	On-Campus Class	

C. GPA Requirement- Add this to your plan if you need a specific GPA for the semester.

D. Place Holder Requirement- this is used if you know you will take a course to fulfill a certain requirement but are unsure which course you will take to fulfill that requirement. For example, you might know that you would like to take a course that satisfies the Ethical and Human Values perspective during Autumn '21 but you're unsure of which course you will take to fulfill the requirement. You can add a Placeholder for this (see example below):

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [Redacted] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Autumn 2021 Total Credits: 6.0 Reassign Delete this term

Critical	Course Requirement	Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	ANTY 101H	3.0	C-	None	None	
Critical	Choice Requirement	Minimum Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	COMX 111A or COMX 212X	3.0	C-	None	None	
Placeholder Requirement	Value	Notes				
Gen Ed Requirement	Ethical and Human Values 'E' course					

Deleting Courses

To delete a planned course, click on the space between the course information boxes so that the whole bar is highlighted in blue and then click the minus symbol.

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [REDACTED] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Autumn 2021 Total Credits: 6.0 Reassign Delete this term + -

Critical	Course Requirement	Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	ANTY 101H	3.0	C-	None	None	

Critical	Choice Requirement	Minimum Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	COMX 111A or COMX 212X	3.0	C-	None	None	

Placeholder Requirement Value Notes

Gen Ed Requirement Ethical and Human Values 'E' course

Delete a Plan

To delete a degree plan, click on the minus symbol to the right of the Description of your plan.

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [REDACTED] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Adding Notes

Notice that on the right-hand side of each plan, semester, and requirement block there is a “Notes” icon. This feature can be used by either you or your advisor to add notes about the plan, semester, or requirement.

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [REDACTED] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not active

Autumn 2021 Total Credits: 6.0 Reassign Delete this term + -

Critical	Course Requirement	Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	ANTY 101H	3.0	C-	None	None	

Critical	Choice Requirement	Minimum Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	COMX 111A or COMX 212X	3.0	C-	None	None	

Placeholder Requirement Value Notes

Gen Ed Requirement Ethical and Human Values 'E' course

View

Use the “View” tab to change how you are seeing your plan. For example, the “Audit” view allows you to look at your degree plan as well as your degree audit so that you can compare. Use the “Edit” view to make changes to your plan(s).

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [REDACTED] View: Edit View View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not locked

Autumn 2021 Total Credits: 6.0 Reassign Delete this term

Critical	Course Requirement	Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	ANTY 101H	3.0	C-	None	None	

Critical	Choice Requirement	Minimum Credits	Minimum Grade	Campus	Delivery	Notes
<input type="checkbox"/>	COMX 111A or COMX 212X	3.0	C-	None	None	

Placeholder Requirement Value Notes

Gen Ed Requirement Ethical and Human Values 'E' course

Below is an example of the “Audit” view. Notice that the comparison degree audit shows ANTY 101H as planned on the student’s degree audit since it is in the student’s degree plan as a ‘choice’ requirement.

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [REDACTED] View: Audit View Plan List New Plan

Group III - Modern and Classical Languages
Still Needed: 1 Class in @ @

Group IV - Expressive Arts
Satisfied by [REDACTED]

Group V - Literary and Artistic Studies
Still Needed: 3 Credits in @ @ or @ @

Group VI - Historical and Cultural Studies
THTR 330H Theatre History I INP (3) Summer 2021

Group VII - Social Sciences
BGEN 1055 Introduction to Business [REDACTED] 3.33 Autumn 2020
Satisfied by [REDACTED]

Group VIII - Ethical and Human Values
Still Needed: 3 Credits in @ @

Group IX - Democracy and Citizenship
HSTR 101H Eur Civ: Birth of Europe [REDACTED] 4 [REDACTED]

Group X - Cultural & International Diversity
(ANTY 101H) Anthro & the Human Experience PLAN (3) Autumn 2021

Group XI - NATURAL SCIENCE
Natural Sciences with a Lab
BIOB 101N Discover Biology INP (3) [REDACTED]
NUTR 221N Basic Human Nutrition [REDACTED] 3.33 [REDACTED]
Satisfied by [REDACTED]

BA Communication Studies Active: Yes
Degree: Bachelor of Arts Status: NOT LOCKED
Level: Undergraduate

2021-2022

Autumn 2021, Total Credits: 6.0	
ANTY 101H	3.0
COMX 111A or COMX 212X	3.0
Gen Ed Requirement	

Disclaimer: You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrar's Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.

View Plan List

If you have created multiple plans, use the “View Plan List” to view all the plans you have created.

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: [REDACTED] View: Edit View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not locked

Autumn 2021 Total Credits: 6.0 Reassign Delete this term

Locked Feature

This feature can be used by your advisor to “lock” your plan in place so that your plan reflects an accurate path to graduation. This tool is useful because it can help students to stay on track, and because has a built in predictive analytic feature to help better determine which courses should be offered by the university based on student demand.

UNIVERSITY OF MONTANA

FAQ Template Management Log Out

Find Student ID [REDACTED] Name [REDACTED] Degree BA Major Communication Studies Level 01 Student Class Level [REDACTED] Last Audit 01/20/2021 Last Refresh Today at 3:14 am

Worksheets Plans Notes Petitions GPA Calc

Student Planner for: Martin, Taylor Marie View: Edit Locked View Plan List New Plan

Description: BA Communication Studies Active Locked

Degree: Bachelor of Arts Level: Undergraduate

Tracking Status: Not displayed, plan is not locked

Autumn 2021 Total Credits: 6.0 Reassign Delete this term

Getting Started (ADVISOR)

- To access a student's Educational Planner, log in to [CyberBear](#). Click on "Cyberbear for Faculty and Advisors", indicate you understand FERPA and select the "Degree Works" option. Now your screen should look like this:

The screenshot shows the top of the Degree Works interface. It includes the University of Montana logo, a navigation bar with "FAQ", "Template Management", and "Log Out". Below this is a search bar with fields for "Student ID", "Name", "Degree", "Major", "Level", "Student Class Level", "Last Audit", and "Last Refresh". There are also buttons for "Worksheets", "Plans", "Notes", "Petitions", and "GPA Calc".

For students, DegreeWorks:

- Provides real-time advice and counsel
- Speeds time to graduation
- Provides intuitive web access to self-service capabilities
- Streamlines the graduation process
- Allows direct access to multiple related services and advice through hyperlinks to catalog information, class schedules, transcripts, help desk services, and FAQs

For advisors, DegreeWorks:

- Supports real-time delivery of academic advice through intuitive web interfaces
- Minimizes errors through consistent degree plans
- Supports more timely degree certification
- Reduces paperwork and manual program check sheets
- Supports and monitors unique program changes



- In the "Student ID" field on the top left of the screen enter the Student ID number of the student you want to build a plan for and select the 'Enter' button. Now your screen should look like this:

The screenshot shows the Degree Works interface with a student's profile loaded. The search filters are filled in: Student ID, Name, Degree (BA), Major (Communication Studies), Level (01), Student Class Level (Sophomore), Last Audit (01/20/2021), and Last Refresh (Today at 3:14 am). The "Worksheets" section is active, showing "Format: Student View" and buttons for "View", "Save as PDF", and "Process New". There are checkboxes for "Include in-progress classes" and "Include preregistered classes". A "Class History" link is visible. Below the search filters, there is a "Save" button and a "(not frozen)" dropdown. The main content area is titled "University of Montana Degree Works" and shows a "Student View" for student A000Ah11 as of 01/20/2021 at 03:57. The student's information is displayed in a table format.

Student	[REDACTED]	College	College Humanities & Sciences	Catalog Year	2020-2021
ID	[REDACTED]	Degree	Bachelor of Arts	Academic Standing	[REDACTED]
Confidentiality Indicator	N	Major	Communication Studies	Institutional GPA	[REDACTED]
Advisors	[REDACTED]	Minor		Total Credits Earned	[REDACTED]
Cohort	MATHP	Concentration	Organizational Communication	Class Standing	[REDACTED]
Campus	UM-Msla				

- From the above screen follow steps in the *Getting Started (Student)* section of this guide to build a plan for your advisee starting with Step 2. Once the plan has been saved, your advisee will be able to access the saved plan in their Degree Works account for purposes of review and planning.