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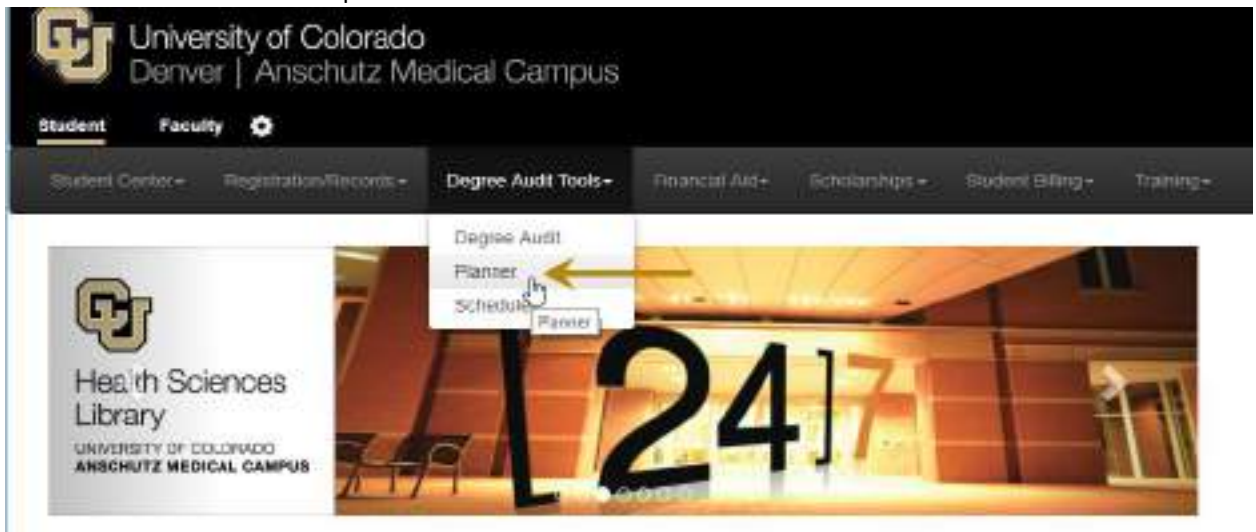
UC Denver Student Guide
Planner

Table of Contents

Student Access

1. Go to your **UCDAccess** portal and click on **Degree Audit Tools**

2. Select **Planner** from the drop down list

3. This will take you directly to Planner

Getting Started

Creating a New Plan

1. Click on the **Plans** tab in the Degree Audit
2. Under the **Plans** tab, click on **Create a New Plan**
   a. Students with undeclared majors will have **Program:** *No Declared Program* or ___
      Undeclared

*Note: If you are seeing **Program:** No title, you have not yet been matriculated. (See below screenshot) If you wish to continue, select the **No title** box next to **Program** to generate a **Degree Program** drop down list. Go to step 3 in Creating a Plan for a Different Major/What If Scenario (pg. 5) to continue with creating a **Plan** if you are not matriculated.*
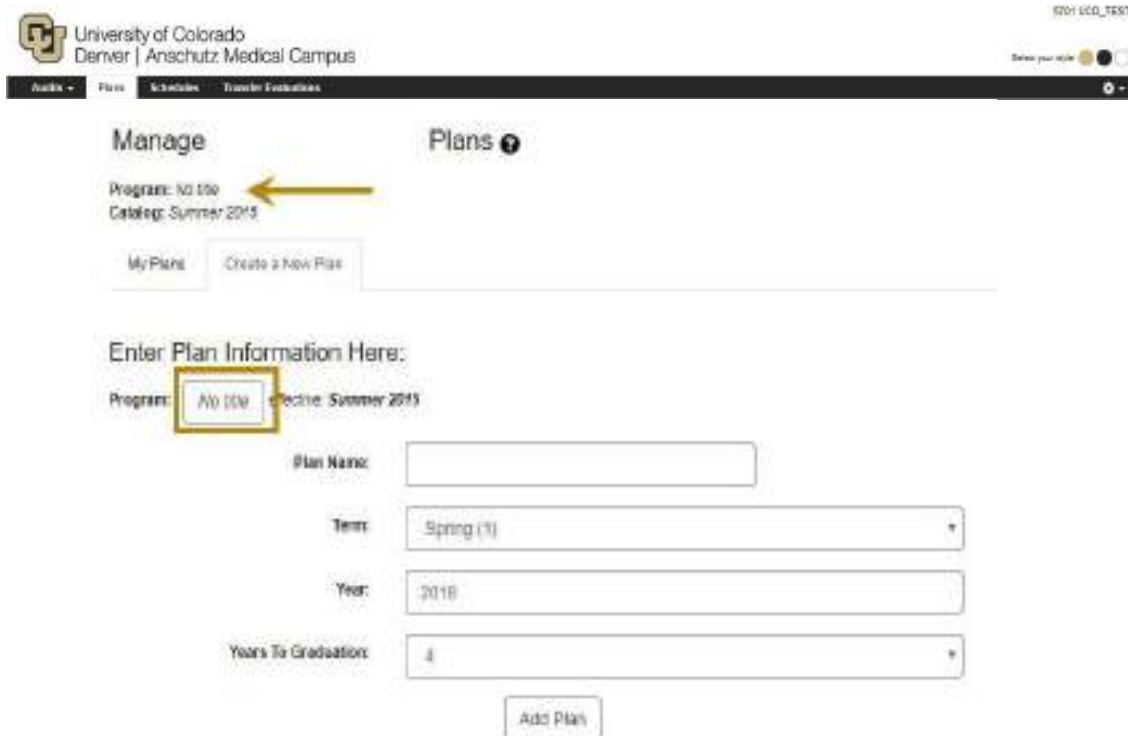
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3. Fill out the corresponding boxes for **Plan Name** and **Year** and select desired **Term** and **Years To Graduation**

    Note: Term must be current or future enrollment (Fall or Spring only)

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Audits ▾   Plans   Schedules   Transfer Evaluations

Manage
Plans ❷

Program: BA ENGLISH - LITERATURE/CREATIVE WRITING
Catalog: Fall 2018

My Plans   Create a New Plan

Enter Plan Information Here:

Program: BA ENGLISH - LITERATURE/CREATIVE WRITING   effective: Fall 2018

→ Plan Name: Engl

→ Term: Fall (7)   ▾

→ Year: 2018

→ Years To Graduation: 1   ▾

Add Plan

4. Click on **Add Plan**
5. This is will take you directly into the Planner
6. All plans accessible under the **My Plans** tab anytime you access **Plans**

University of Colorado
Denver | Anschutz Medical Campus

Audits ▾   Plans   Schedules   Transfer Evaluations

Manage
Plans ❷

Program: BA ENGLISH - LITERATURE/CREATIVE WRITING
Catalog: Fall 2018

My Plans   Create a New Plan

Preferred	Edit Plan	Action	Updated	User	PDF
★	Engl	Select... ▾	Jul 18, 2018		PDF

* indicates a plan without associated loadmap

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Creating a Different Plan for What If Scenario

1. To create a "What If" plan, a new program can be added
2. Click the current major in the **Program** box, in this example **BA ENGLISH – LITERATURE/CREATIVE WRITING**

3. Find, expand, and select the potential new program from collapsible list
   - Active, declared major will show up in yellow

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4. Fill out the corresponding boxes for **Plan Name** and **Year** and select desired **Term** and
    Years To Graduation
    Note: Term must be current or future enrollment (Fall or Spring only)
5. Select **Add Plan**

Program: *BA ENGLISH - LITERATURE/CREATIVE WRITING*
Catalog: *Fall 2018*

My Plans	Create a New Plan

Enter Plan Information Here:

Program: BA ANTHROPOLOGY   effective: **Fall 2018**

Plan Name: Anth

Term: Fall (7)

Year: 2018

Years To Graduation: 4

Add Plan

Return to Table of Contents

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Managing Multiple Plans

1. If more than one plan is created, they will appear under **My Plans** tab
2. The first plan created will default as the **Preferred**
3. The plan the student intends to apply to **Schedules** needs to be starred as **Preferred**

4. If a plan needs to be changed to **Preferred,** selecting the blank star beside the plan will set it as **Preferred**
5. **Preferred/Starred Plans** have the following options: *Edit Plan, Rename,* Or *Copy*
   a. Edit Plan is just another way to access Planner
   NOTE: Preferred plans cannot be deleted.

6. All other plans have *Edit Plan, Rename, Copy or Delete*

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The Planner: Sections and Icons
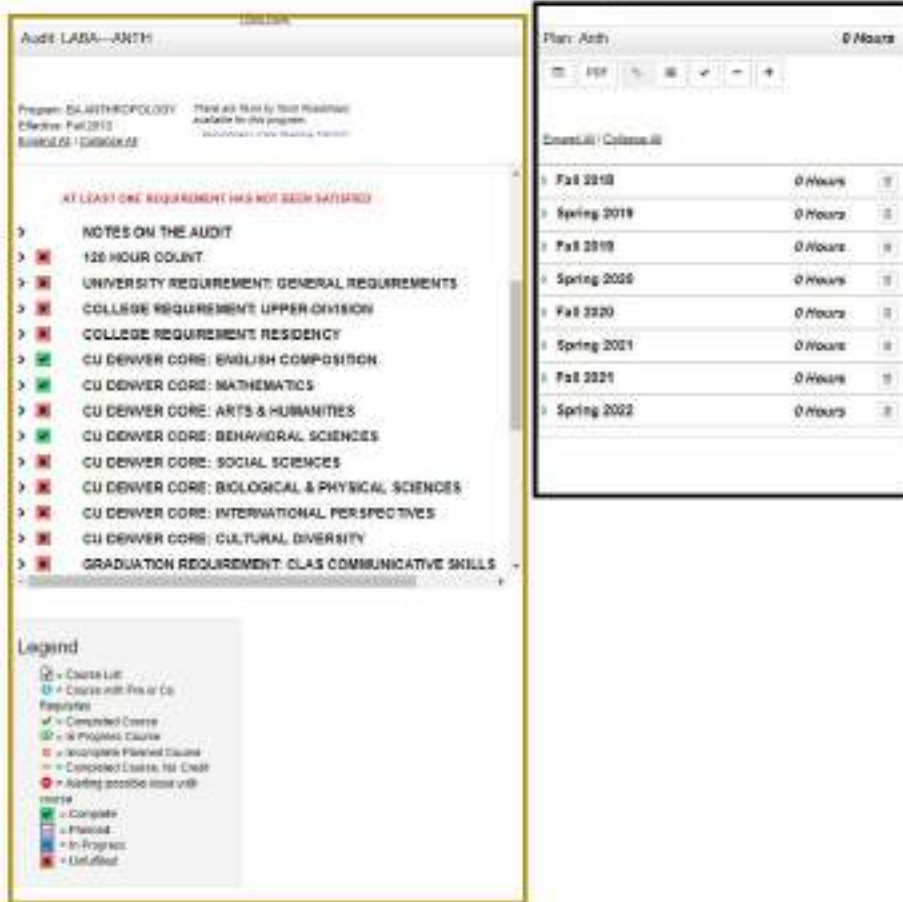
Plan Sections

1. On a full or half size screen
   a. **Degree Audit section** will display on the left hand side
   b. **Plan section** will display on the right

Plan Icons

*Click on the numbers or links below to jump to specific sections

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Plan: Anth

PDF

1. This will generate a full Degree Audit with purple planned courses
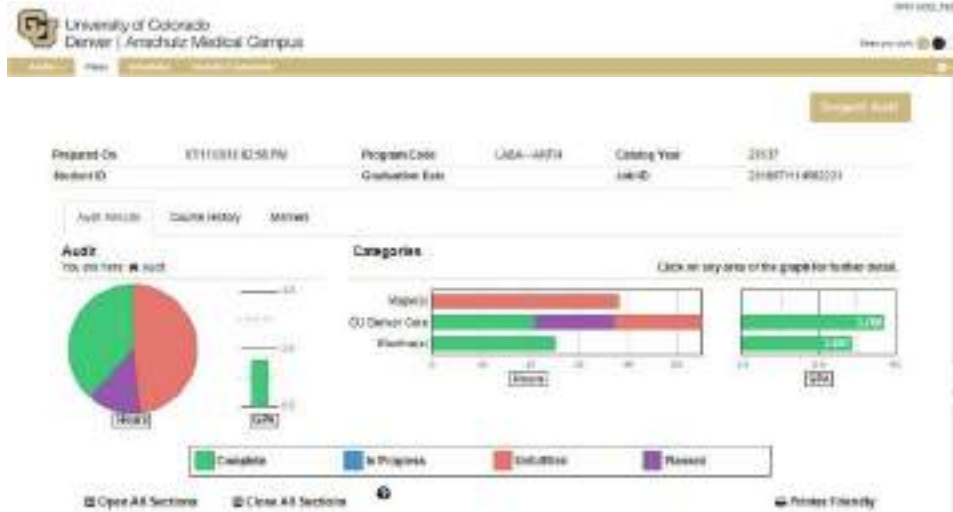
   a. Like running a normal Degree Audit, this planned course Degree Audit will be archived
   b. To view previous Degree Audits with planned course notations, go to **Audits Tab** and select **Manage**

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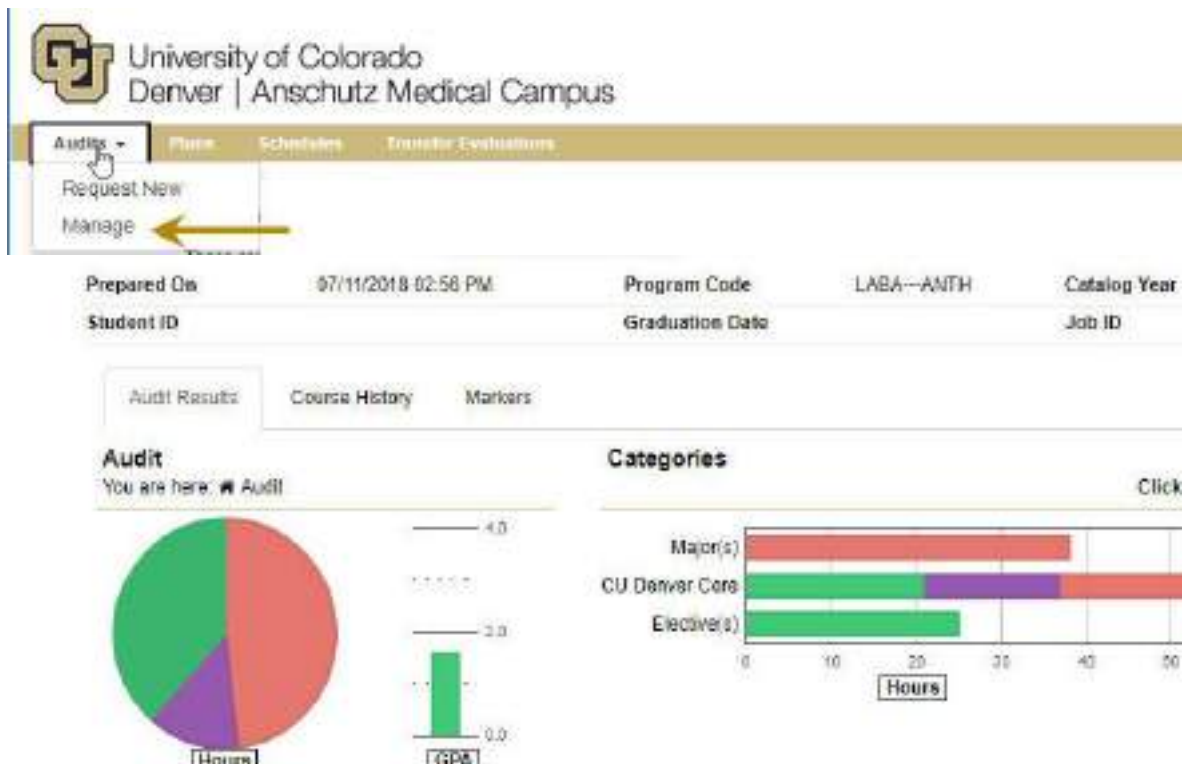c. Previously saved Degree Audits with planned courses will display p*lanner-username* under **Run By** and a purple calendar icon under **Course Type**

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Audits ▾   Plans   Schedules   Transfer Evaluations

Completed Audit Requests

These are the audits that have been run in the past for this student's record. Hitting the 'Run Audit' button will run a new audit report. Deleting audits removes them from this list.

1 completed audit was deleted.

Run Audit   **Delete**

select all/select none

Program	Catalog Year	▾ Created	Audit Type	Format	Run By	Course Type	View	Delete
LABA--ANTH	20137	07/11/2018 2:56 PM		HTML	planner-	📅	View Audit	☐
LABA--ANTH	20137	07/11/2018 2:53 PM		HTML	planner-	📅	View Audit	☐
LABA--ANTH	20177	06/12/2018 4:43 PM		HTML	planner-	📅	View Audit	☐
LABA--ANTH	20177	03/28/2018 10:59 AM	WHAT-IF	HTML			View Audit	☐

You must have the free Adobe Reader program installed on your computer to view the documents marked PDF. Download the free Adobe Reader program.
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Privacy Policy
Selfservice Version: 4.4.2 – 10/27/2017 03:08 PM | Build: 1.2 – 5/3/2018 10:57 AM

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2: Printable PDF

Plan: Anth

1. This creates a printable, PDF list of completed and planned courses
    *IMPORTANT NOTE: This currently lists in progress and registered courses in the **Completed Courses** section. Please treat this section as In Progress, Enrolled, Registered and Completed Courses and be aware that all courses may not fully be completed.*
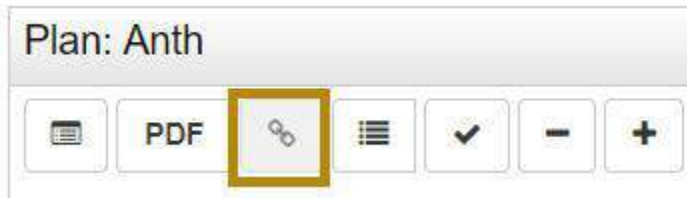

*TIP: This printable PDF can also be accessed through the **Plans** tab on the main screen under **My Plans***

Return to Plan Icons *(pg. 9)*

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3: Associated Roadmap

1. This allows you to access an associated Roadmap, this feature is not available at this time.

4: Plan Section with Completed Courses

1. Displays only the Plan section with completed courses with grades, in progress/registered courses and/or transfer courses
   a. Select the icon again to return to full view

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5: Check Planned Courses against Degree Audit/Roadmap

Plan: Anth

| | PDF | | ≡ | ✓ | − | + |

1. Degree Audit – [icon] a purple icon will appear next to planned courses
2. Plan section - courses will receive a symbol per the legend on the bottom of the page, in this example these courses received an x as they are *Incomplete Planned Course* (noted on the legend)

⌄ Fall 2018

Add Course [icon]

✗ EDFN1000 (3 Hours)
    Equality, Rights & Education

✗ ECON2022 (3 Hours)
    Principle of Econ: Microeconomics

Legend

  📄 = Course List
  ① = Course with Pre or Co Requisites
  ✓ = Completed Course
  IP = In Progress Course
  ✗ = Incomplete Planned Course
  — = Completed Course, No Credit
  ⊖ = Alerting possible issue with course
  ✓ = Complete
  📅 = Planned
  ▦ = In Progress
  ✗ = Unfulfilled

Return to Plan Icons (pg. 9)

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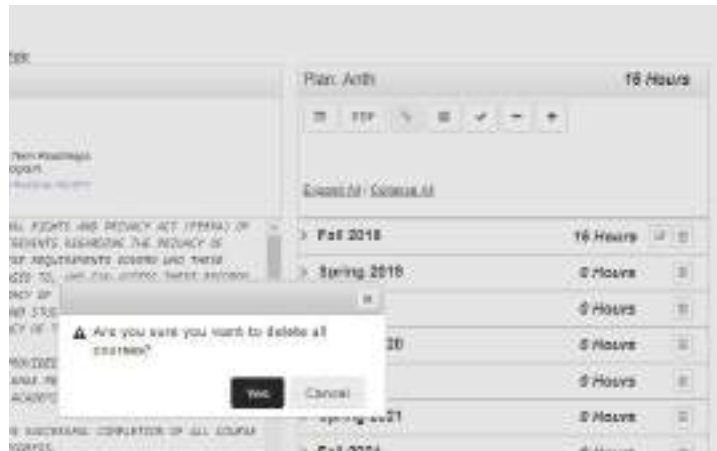
6: Remove All Courses

1. Removes all courses
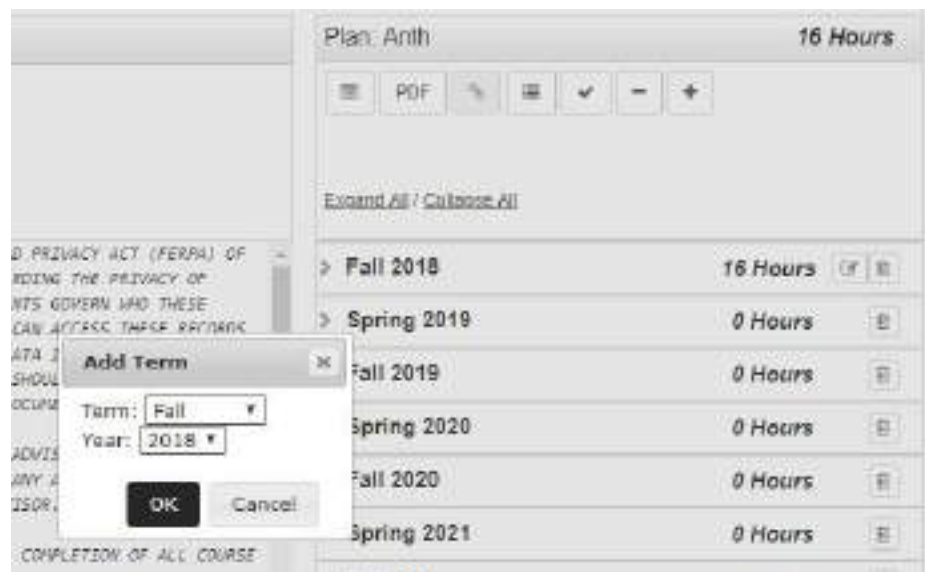   a. This button will remove all future planned courses, *except* completed and/or registered classes

7: Add Terms

1. Adds another term to plan

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8: Edit Courses

1. Individual classes can be removed in edit section
2. Hours can be edited for variable class hours like independent study, internships, etc.
   a. These particular classes cannot be added more than once in one term and you will need to combine all hours for variable class hours. In the example below, if you are planning to take 3 internships under ANTH3939 – you will need to add three hours instead of adding the class 3x.
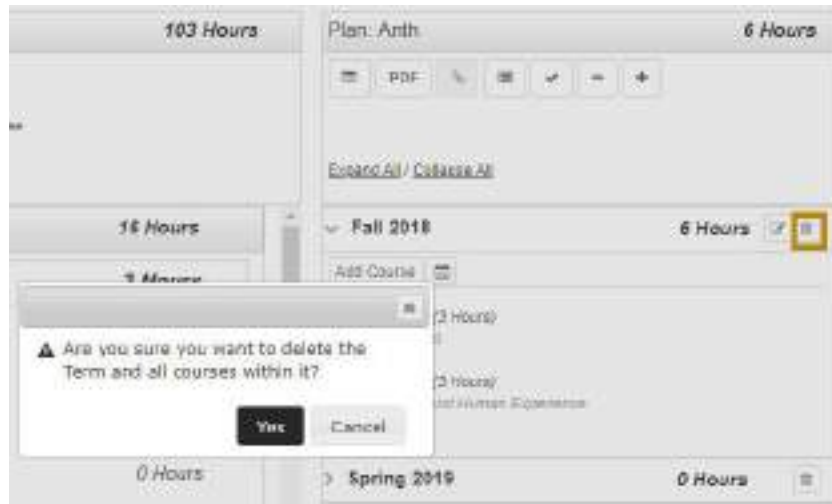   b. Click **Submit** to save updated hours

Return to Plan Icons (pg. 9)

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9: Trashcan

    1. Removes an individual term and all courses

10: Apply Courses to Schedules

    1. Once terms are planned, you may select the calendar icon to Schedule planned courses

        a. The planned courses on the calendar will only work for terms for the current registration cycle

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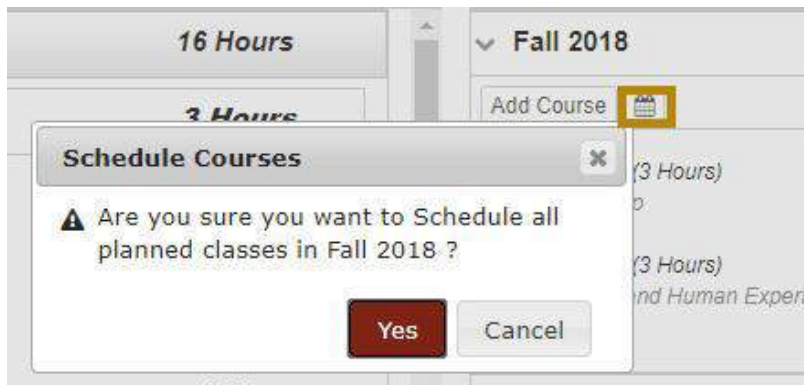
## Planning from Degree Audit

1. In the Degree Audit, expand [X] **Unfulfilled** degree requirements to list recommended courses
2. Clicking on a course will pull up course descriptions


3. Once decided which course to take, drag the course to the desired term to the **Plan** section
   a. Make sure that the course is directly on top of the desired term, it will turn blue to allow you to drop


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4. Alternative to the drag and drop, courses can be manually added to the **Plan** section
   a. After expanding a term by clicking on the caret symbol ⌄ , select **Add Course** and a course search option will populate
   b. Fill in the **Department Abbreviation,** entering a letter initially will populate a list
   c. Under **Course Number,** you can enter numbers 1 through 4 to populate a list of course numbers
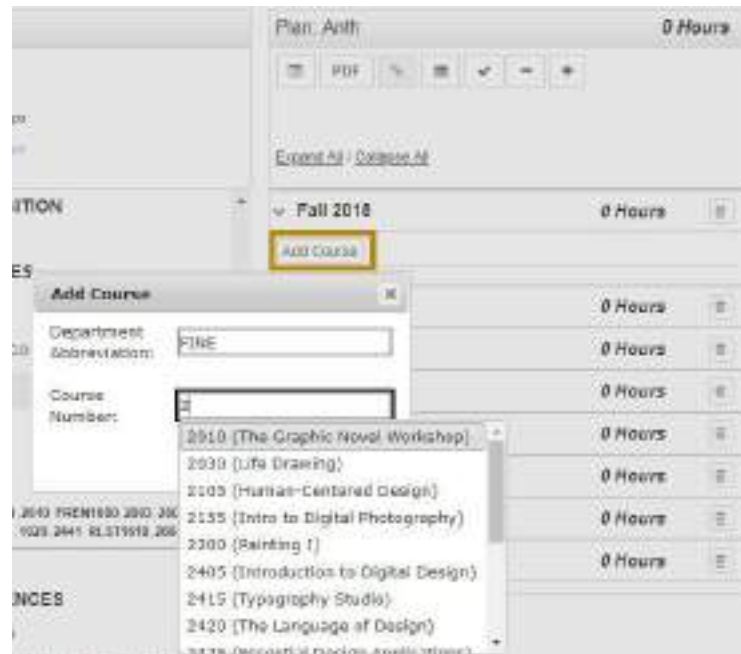
Several important points to note:

▪ *Variable credit courses like Topics, Internships, and Independent Study only list 1 credit hour when initially adding. You may change the number of credit hours through the Edit Icon. ✏ These variable credit courses cannot be added twice to the same term, you need to account for all hours combined. In this example: A student is talking two 1 credit hour Internships under Anth3939, edit hours to 2 instead of trying to add two Anth3939 classes.*

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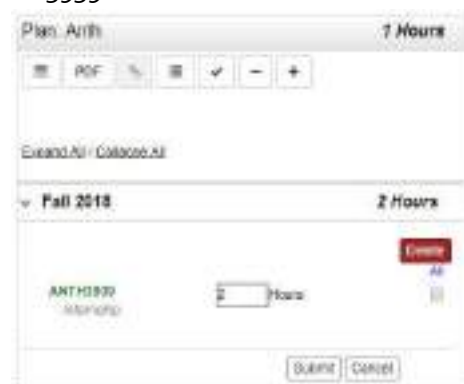
- *There may be some cases where you are adding a recommended course more than once. If you are adding the same class to several semesters, the Plan section will not alert that classes have been repeated. The last term that the repeated class is added to will be applied to the Degree Audit section.*

- *The other classes that were repeated will be set as >R in Work Not Applied. The only time a repeat is alerted is when a completed or in progress class has been added to the Plan section, it will show up with either a letter grade or *** for in progress*

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5. Once courses have been set to desired term, select the check mark to apply planned courses to the Degree Audit

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6. Once check applied, the **Degree Audit** section will display a purple calendar next to planned courses and a symbol per legend will appear in the **Plan** section, in the example below the symbol appears as an *Incomplete Planned Course*
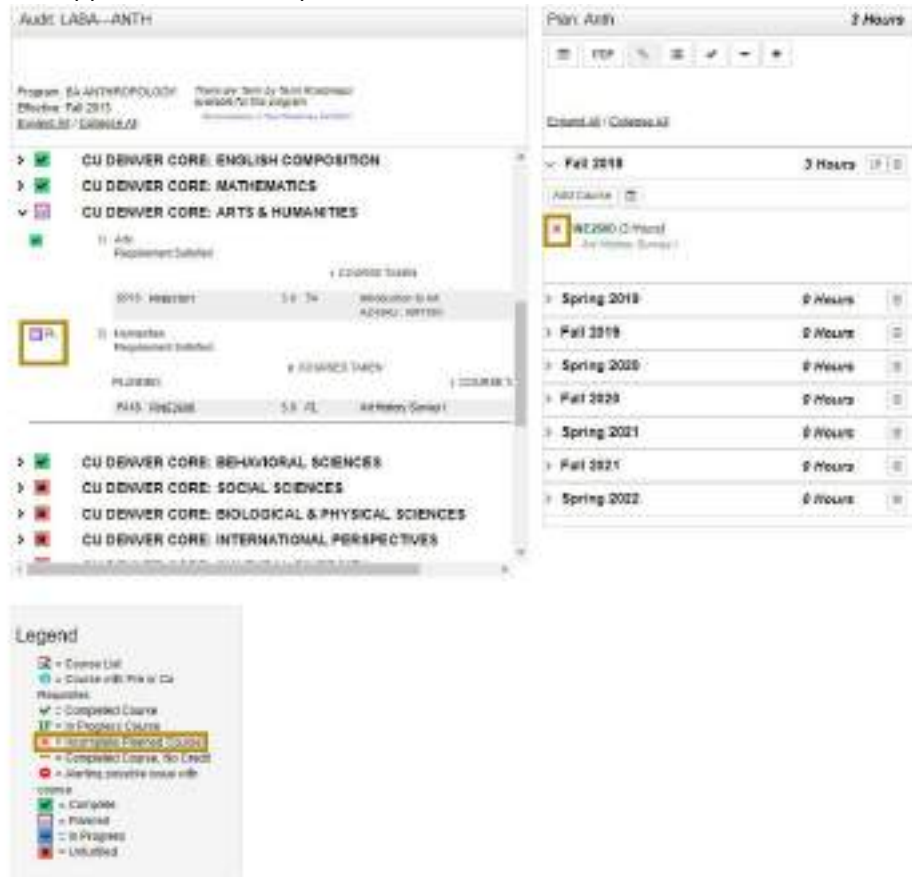
7. Refer to *Plan Icons* Sections: 1 & 2 (pg. 13-15) for review of how to view pie charts of planned courses or print PDFs
8. Planned classes for the *upcoming* registration term can be imported directly into the scheduler, click on the calendar icon to apply the upcoming term of planned classes to the **Schedules** application
   b. Reminder: The calendar icon will only appear if the Plan is marked as **Preferred** in **My Plans** tab
   c. The calendar icon will appear for every term that has planned courses, but if you click on an calendar icon next to a future term – those classes will not be added to Schedules
   d. Please see Schedules guide for training

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Advisor Approval

When an advisor has approved your **Starred/Preferred** plan, you will no longer be able to make edits, but you can add courses for the upcoming registration term into Scheduler

1. If an advisor has approved an entire plan:
    a. A green notification will appear on the left hand side notifying of:
        i.   Who approved it
        ii. Which program plan was approved
        iii. And the date and time it was approved
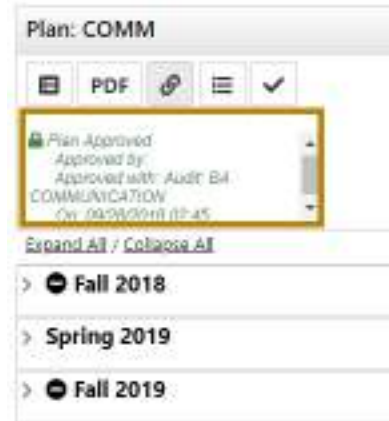
    b. In Plans tab under **My Plans**, the **Starred/Preferred** plan will no longer have a star and instead a lock icon will appear to let you know this entire plan is approved and locked
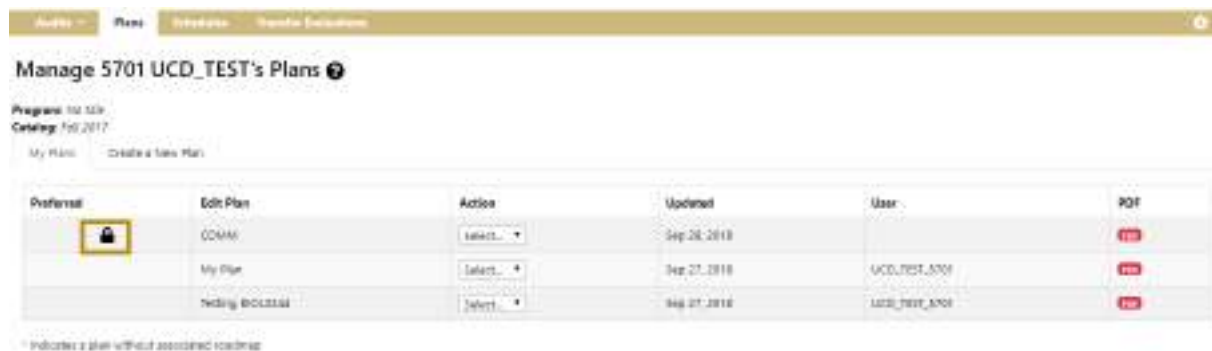
2. If an advisor has approved one or more individual terms:
    a. Your approved term will receive an Approved notification in green
    2. The **Starred/Preferred** plan will not show an lock icon like it will for an entire approved plan

FAQs

When I first create a plan, what if I'm seeing Program: No title?

This means you have not yet been matriculated. If you wish to continue, select the **No title** box next to **Program** to generate a **Degree Program** drop down list. Expand and select the program you wish to plan.

How do I add a summer term when creating a new plan?

The option to add a summer term will not appear initially when creating a new plan. When creating a plan, select either term and once you are in Planner click on the **Add** icon button which will allow you to add a summer term from the drop down list.

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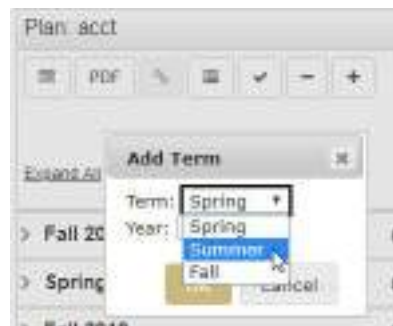
Will there be an alert for pre-requisites and co-requisites while planning?

Pre-requisites will be alerted in the Plans Section. They will turn red and receive the Pre-Req/Co-Req symbol that's on the legend. Clicking on the course will pull up a course description and which class is the pre-requisite or co-requisite for that class.

⊖**PHYS2020** *(4 Hours)*
College Physics II

## *Some classes are offered during specific semesters, will the Planner alert course availability by term?*

No, similar to how you may normally plan for upcoming semesters, you may not always account for or know about courses that are offered during a specific semester. The Planner will not alert you, but those courses will not be applied to Scheduler.

Does an actual class need to be listed for general electives?

Yes, the planner does not allow for a placeholder like "DEPT Elective" or "General Elective", you must choose an actual class through the **Add Course** button.

After expanding a term by clicking on the caret symbol

⌄ , select **Add Course** and a course search option will populate

1. Fill in the **Department Abbreviation,** entering a letter initially will populate a list
2. Under **Course Number,** you can enter numbers 1 through 4 to populate a list of course numbers

![CU Office of the Registrar - University of Colorado DENVER]
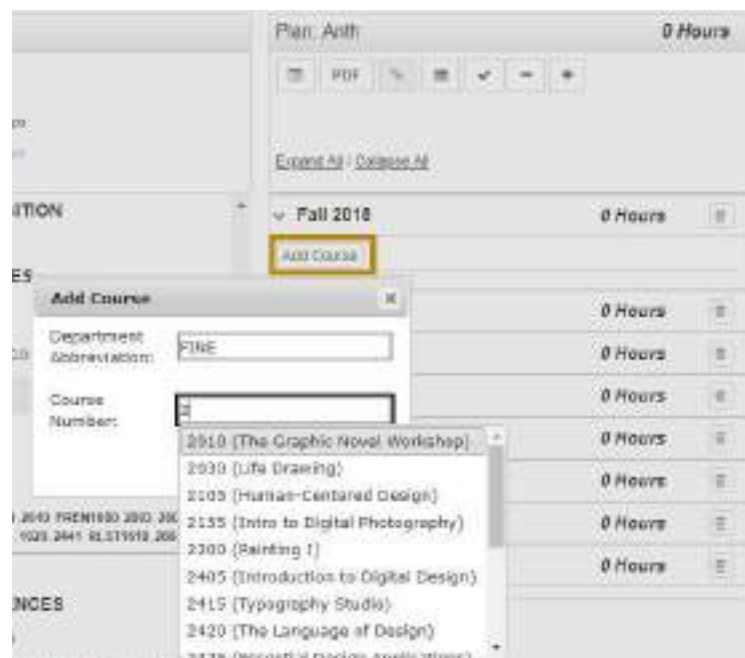
Why is the printable PDF not listing in progress or registered courses?

Plan: Anth

The printable PDF currently lists in progress and registered/enrolled courses under the **Completed Courses** section. Please treat this section as In Progress, Enrolled, and Completed Courses and be aware that all courses may not fully be completed.


Printed: 07/11/2018 03:14
Student:
StudentID:
Plan Name: Anth
Program: BA ANTHROPOLOGY
- Completed Courses:
  - COMM1011 (3.0 Hours) Fundamentals of Communication
  - ENGL1020 (3.0 Hours) Core Composition I
  - ENGL1999AE (1.0 Hour) Crit Read Wrtng in Univ
  - PSYC1000 (3.0 Hours) Introduction to Psychology I

Tip! This printable PDF can also be accessed through the **Plans** tab on the main screen under **My Plans**

How do I add more hours to variable credit hour courses like internships?

Variable credit courses like Topics, Internships, and Independent Study only list 1 credit hour when initially adding. You may change the number of credit hours through the Edit Icon 📝 since these variable credit courses cannot be added twice to the same term, you need to account for all hours combined. In this example: A student is talking two 1 credit hour Internships under Anth3939, edit hours to 2 instead of trying to add two Anth3939 classes.

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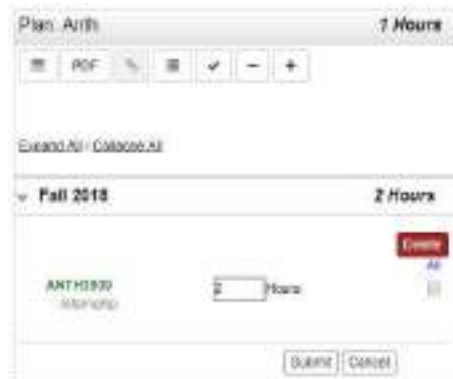
Will I be alerted of repeats if I somehow add the same course to more than one term?

No, repeats will not be alerted in the case where you unknowingly add a recommended course to more than one term. After planning classes, it is best practice to check **Work Not Applied** section to check for repeated courses. The other repeated classes will be set as >R in Work Not Applied. The only time a repeat is alerted is when a completed class has been added, it will show up on Plan with the letter grade
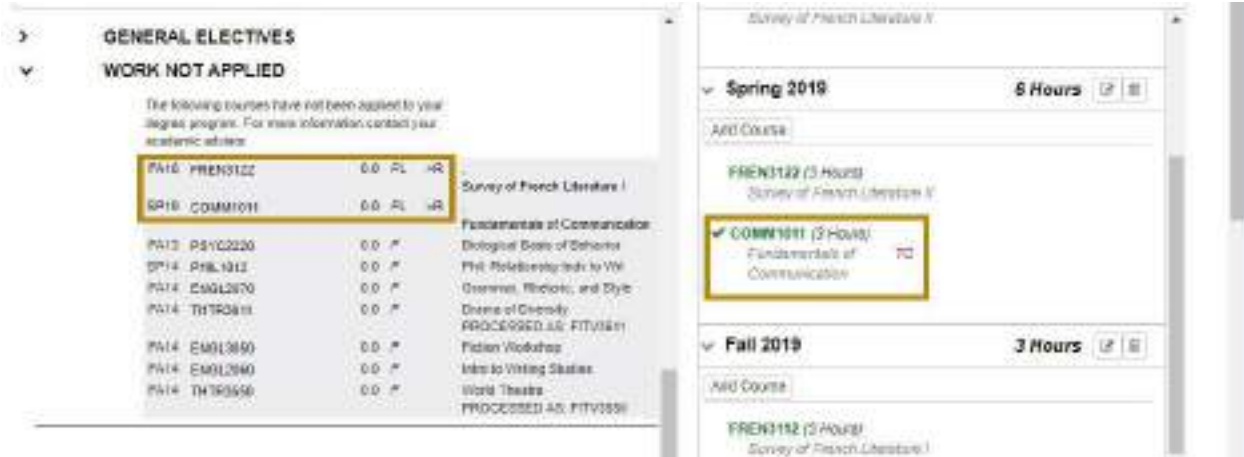
The last term that the repeated class is added to will be applied to the Degree Audit section.

Can future planned terms be applied to Schedules?

Only planned courses for the upcoming registration term can be applied to Schedules. The calendar icon for Scheduler appears for all terms, but those classes will not be applied until they are the upcoming registration term.

I am trying to apply planned courses to Schedules, but the calendar icon does not appear?

If you have more than one plan created, you must *star* the preferred plan in order for it to be applied to Schedules. Go to **Plans** tab and under **My Plans**, select the star next to the plan you want imported to Scheduler. Once you go back into that plan, a calendar icon will appear. If an entire plan is locked by an advisor and this symbol 🔒 appears instead of a star, you will not be able to star other plans.

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