DEGREE WORKS USER'S GUIDE

Department Head/Advisor with Exception Access Edition

Missouri State University

For Degree Works Version 5.0.6.1-Revised January 2022

Office of the Registrar

Registrar@missouristate.edu

Contents

Degree Works 5.0.6.1 User's Guide-Department Head/Advisor with Exception Access Edition

Degree Works is the University's degree audit (what classes to take) and course planning (when to take these classes) software. This user's guide will assist the user in performing the basic functions associated with their role using this software. For additional resources related to Degree Works including user documentation, updates, and an FAQ, please visit the University's Degree Works homepage at https://www.missouristate.edu/registrar/degreeworks.htm.

Section 1: How To Use The Degree Audit

Degree Audit Access Locations

Students

My Missouri State>Student tab>My Graduation Path channel>Degree Audit and Student Educational Planner link **OR** My Missouri State>Registration tab>My Student Records channel>Degree Audit and Student Educational Planner link
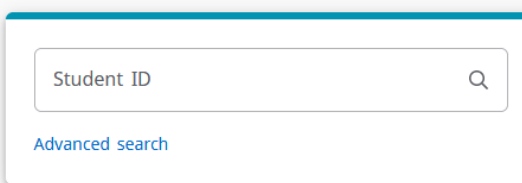
Advisors:

My Missouri State>Teaching and Advising tab>Advisor Services channel> Degree Audit and Student Educational Planner link

Degree Audit Opening Navigation

Students will go directly to their degree audit. Advisors will go to the below landing page labeled Degree Audit if they have no personal MSU coursework Users who were formerly a student may initially have their own information pre-populated instead. From this screen, advisors can either enter the student's BearPass number directly in the Student ID box or can click on the Advanced Search link below the Student ID box to search for students by a variety of filters. Users who were formerly a student may initially have their own information pre-populated.

In the Advanced Search, users can search for students using filters such as name, program, major, minor, college, degree, level, and classification. To use this feature, you click in the corresponding filter box, click the value(s) you wish to select within the respective filter box, and scroll down to the bottom of the Find Students box to click the "Search" box.

Degree Audit Top Audit Functionality

The last date and time that the audit was refreshed can be found in the upper left on top of the first block. Registrar users will have a refresh icon to prompt a data refresh. Other users will not.

On the right side (across from the data refreshed information), you will find a printer icon, email icon, and ellipse icon.

Print Icon (Printing an Audit/Saving Audit as PDF)

The print icon is what allows you to print and/or save the audit as a .pdf. The only way to reliably print a degree audit is to print it from .pdf view. To do so, click the printer icon. This will open a Choose Dimensions selection box. The default is letter size, portrait orientation, but other options are available. Select your preferred .pdf dimensions and click "Open PDF."

Choose dimensions ✕

Select dimensions for PDF

PDF dimensions *
Letter - Portrait (8.5 x 11 in) ⌄

CANCEL   **OPEN PDF**

The PDF version of the degree audit has a slightly different format than the web version, but contains the same graduation requirements. To print it, click the print icon, which is typically found in the upper-right portion of the browser window, and then select your desired physical printer. To save the PDF, instead of selecting a physical printer, select Microsoft Print to PDF or Save to PDF as your browser allows, and save the document to your desired location.
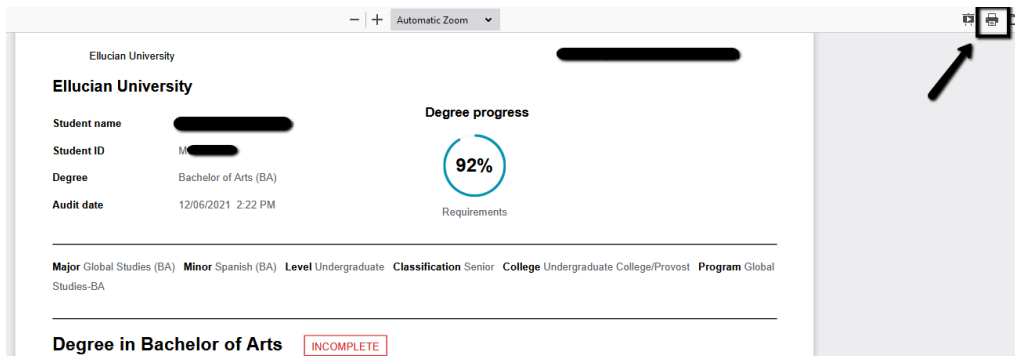
Email Icon

The email icon allows a Registrar, Department Head, or Advisor level user to email the student. The email icon allows a student to email their academic advisor. After clicking the email icon, it will open a Contact box that shows the corresponding contact information.

Ellipse Icon

The ellipse icon allows the user to view the student's class history. This is similar to an unofficial transcript, although it displays no GPA information and no repeat codes. It is simply a chronological list of coursework completed by the student. It will only display coursework that matches the level of the

audit, so as an example, only undergraduate courses would show on a class history accessed from an undergraduate audit. Graduate coursework would not.

Information Block Display

In the first block, you will find the student's BearPass number and name. The Degree drop-down box is where you can toggle between degrees and certificates if the student is working on more than one degree and/or certificate. The student's curriculum information, level, classification, sport for student athletes, and current semester advisor assignment are found in the upper block as well. For the sport, this will only be visible if the student is a student-athlete. Otherwise, the sport field will not display.

For advisor, each advisor will appear with the advisor type in parenthesis following the advisor's name. There will be an asterisk beside the primary advisor. The advisor types you may see are as follows:

Advisor Types	
Major (MAJR)	Success Coach-Grant (SCSG)
Success Coach-Athletics (SCSA)	Success Coach (SCSN)
Success Coach-Bears Lead (SCSB)	Secondary-Minor, Certificate, Other (SECN)

Additionally, MSU and combined cumulative GPAs are displayed here as well as any holds the student may have. If the student has no applicable hold, the holds field will not display.

Above the next block is where you pick the type of audit you wish to run. Academic is the primary audit. The other choice is What-If, which is a prospective audit for a different program. In the second block, you will find the Format drop-down, where you can select the audit view you wish to use. The Student View is the default view used by students and advisors. The Registrar Report view is like the Student View but also shows the Scribe programming behind the audit. The other views here are rarely used. As you move to the right, you will find the degree progress wheel. This shows the student's progress towards checking off all the requirement boxes on the degree audit. This is not the number the credits completed towards graduation.

Continuing to the right, you will find the in-progress (or current semester) and pre-registered (or future semesters for which the student is registered) checkboxes. These are checked by default but can be unchecked if the user wishes to run an audit excluding these courses.

To the right of these checkboxes is the "Process" button. This is the button clicked when the user wishes to run a new degree audit.

Just below the second block is the date and time of the current degree audit. The audit will check each evening to see if the student had a grade, registration, or test score change. If any changes are found, a new degree audit will generate. Otherwise, the audit can be manually updated using the "Process" button described above.

There is an additional menu below the Audit Date line. The first link is the Diagnostics link, which helps Registrar staff in seeing the logic that the auditor is using to assign courses. The second link is the Student Data link, which helps Registrar staff in seeing course characteristic data assigned in the audit functions. The third link is the Save Audit link, which allows Registrar staff to save a specific audit if needed. The fourth and final link is the Delete Audit link, which allows Registrar staff to delete a specific audit if desired. These are rarely used

Degree Audit Legend

The Degree Works symbol legend can be found at the end of the degree audit. So, while this is presented out of order compared to the flow of the audit, it's important to understand the symbols used before going into the degree audit requirements.

- Complete (green circle with a checkmark)-requirement is met.
- Not complete (open red circle)-requirement is not met
- Complete except for classes in-progress (half-filled blue circle)-requirement being met with current, future, or incomplete classes
- Nearly complete-see advisor (yellow circle with exclamation mark)-requirement that is not satisfied but there are no specific classes assigned to address it such as a GPA issue
- Any course number (@)-wildcard to represent any missing applicable number. For example, HST @ means any HST course. SPN 5@ means any 500 level SPN courses.
- Repeated class (R)-Found in the Audited, Failed, Dropped, Repeated sections on classes that have been excluded due to be repeated.
- While not formally found on the legend, transfer grades are indicated with a "T" in front of them. Additionally, transfer course listings also include the originating institution, course number, and course title.

- Additionally, at the overall block level, the "Complete" symbol is replaced by the word "Complete" in a green box, the "Complete except for classes in-progress" symbol is replaced by the word "In-Progress" in a blue box, the "Not Complete" symbol is replaced by the word "Incomplete" in a red box, and the "Nearly complete-see advisor" symbol is replaced by the words "See Advisor" in a yellow box.

COMPLETE | IN-PROGRESS | INCOMPLETE | SEE ADVISOR

Degree Audit Block Structure and Type

There are several types of blocks. Each block will display the catalog year it is operating from just below the block title. The completion status of the block is displayed to the right of the block title as incomplete (red text), in-progress (blue text), complete (green text), or nearly complete (yellow text).

General Education Requirements   IN-PROGRESS

Catalog year: Spring 2021

Your general education GPA is 3.87.

- Degree block-This is the requirement that monitors everything needed to complete the degree. This includes general baccalaureate degree requirements (120 minimum hours, 40 hours upper division, residency, exit survey, and other such degree or program requirements) as well as that general education, major, and minor (as applicable) requirements have been fulfilled.
- General Education or Core 42 block-Found on undergraduate audits only, this is the block that shows which set of requirements the student is following. If the student has an AA degree, 42-hour block, or previous bachelor's degree with the proper accreditation transcripted on their transfer evaluation, any missing courses in this block will automatically be waived.
- Major, minor, or certificate blocks-This is where the respective major, minor, or certificate requirements are monitored.
- Additional program/degree blocks-These are additional requirements necessitated by the program and/or degree the student is pursuing. Examples include blocks such as program admission requirements, secondary education requirements, College of Business globalization and upper-division GPA requirement, Bachelor of Arts (BA) degree requirements, and other such requirements.
- Audited, Dropped, Failed, Repeated block-This contains the courses that are not eligible to fulfill requirements for the various reasons listed in the title. Repeated courses do not move to this section until the corresponding repeat code is assigned during end of term processing.
- Not Counted block-This contains courses that are not eligible to apply towards graduation. This includes courses that are part of a rule where only one of a group of courses can be counted toward graduation and courses that are only allowed to apply towards a specific program or degree.
- Honors College block-This contains the requirements for those participating in the University's Honors College program. Since Honors College participation is not a graduation requirement, it is a graduation-optional block, meaning that students who leave the Honors College will not be penalized in graduation eligibility checking when this block is not completed.

The block also contains the requirements related to the respective block. In this example from a General Education block, we will focus on the Human Cultures requirement. This shows that the overall Human Cultures section is unmet, as symbolized by the Not Complete symbol to the left of the Human Cultures section title. Under it, there are three sub-requirements. The first two Focus (Social and Behavioral Sciences and Humanities) are met as symbolized by the Complete symbol to the left of their titles. The last Focus (Arts) is not met as symbolized by the Not Complete symbol to the left of its title. To the right, it lists what is still needed to meet it, which is one course from a list of courses. Once the student registers in one of these courses, both the Focus on the Arts and Human Cultures title symbols will change to Complete except for classes in-progress. Once the class is complete and passed, these will change to Complete.

○	HUMAN CULTURES		Complete four different course prefixes in the Human Cultures section.Students who have general education courses waived by AA/AAT degree,42 hour core, or previous Bachelor's degreewill have the four prefix requirement waived.Students with multiple GEC or GEP prefix courses may see the Office ofthe Registrar for assistance if prefix count adjustment is needed.			
⊘	Focus on Social and Behavioral Sciences	GRY 108	Principles of Sustainability	A-	3	Fall 2019
		SOC 150	Introduction to Society-HONR	A	3	Spring 2019
⊘	Focus on Humanities	HST 104	World History since 1600 C.E.	A	3	Spring 2019
○	Focus on the Arts	Still needed:	1 Class in ART 200 or DAN 180 or ENG 203 or 205 or 215 or MUS 239 or THE 101			

Degree Audit CourseLink

If you click on a hyperlinked course anywhere in the degree audit, it will bring up a block of information that shows the course prerequisite (if applicable), catalog description, and class schedule information including date/times that courses are scheduled to be offered along with the number of seats available in each section.

Course Information   ✕

ENG 205 - 3 Credits - Creative Writing: Nonfiction

Prerequisite: ENG 110. General Education Course (Focus on the Arts). MOTR number PERF 106NF - Creative Writing-Nonfiction. A study of the key characteristics of creative nonfiction, including an introduction to the evolving forms of text classified as creative nonfiction. Practice in writing prose with a focus on collaborative workshops and revision. Emphasis on the creative interpretation of complex thoughts and human experiences. 3(3-0) F,S,Su

Attributes:
M118   GN08   GE20

Sections:

Term	CRN	Section	Seats open	Meeting times
Summer 2021	30378	899	22 (out of 22)	To be announced
Fall 2021	40199	001	22 (out of 22)	M W 09:30am - 10:45am
Fall 2021	40357	002	22 (out of 22)	M W 11:00am - 12:15pm

Degree Audit Transfer Equivalency Information

If you have transfer work, you can see how those courses applied to your degree audit. Each transfer course will show the originating institution, course title and course number below the MSU equivalency as shown in the screen shot below.

⊘ Focus on US & MO Constitutions	PLS 101	American Democracy	TA	3	Spring 2020
	Satisfied by:	POL101 - American Governmnt - St Charles Community College			

Degree Audit Exceptions

Departments sometimes will substitute or waive a course requirement. Department heads and authorized designees may enter exceptions through the exceptions tab ***for their department's majors, minors, and certificates only.*** They are not authorized to make exceptions to University degree requirements and/or general education. Those types of changes must be authorized by the corresponding authority or committee.

Exceptions show in two places on the audit. The first is near the applicable course location. Included is who entered the exception, the date, and a description of the action taken. The second is an exception section at the bottom of the audit. This includes whether the exception is "enforced" or working. The primary reason one would not be enforced is that the student changed catalogs and/or programs and therefore the exception was broken. Each exception ties to a specific block, which is like an address based on the program and catalog identification of the block.

⊘ Food/Agricultural Chemistry	CHM 201	Essentials/Organic Chemistry	B+	3	Fall 2019
	Exception by: ▬▬▬▬	**On:** 04/22/2021	**Substitute:**	Replace AGR 300 with CHM 201-Animal Science major	

Exceptions

Type	Description	Created on	Created by	Block	Enforced
Substitute	Replace AGR 300 with CHM 201-Animal Science major	04/22/2021	▬▬▬▬	Major in Animal Science	Yes

Degree Audits-Limitations to Administrative Process Dependence

The degree audit's ability to process that a student is repeating a course is based off of the corresponding repeat codes in Banner. Repeat codes are not applied until the end of the semester. Therefore, if a student passes a course and is in the progress of repeating it (Ex: gets a "D" in ABC 123 in a previous semester, takes it again to improve their grade this semester), the course could be used in the requirements twice until the repeat code is assigned and the first attempt is excluded. Therefore, it is important to look for these situations when advising a student.

Mixed credit (courses with special approval to count as both undergraduate and graduate credit) require special end-of-term processing. During the semester of enrollment, the student will be enrolled in the graduate side of the credit, and graduate credit does not appear on an undergraduate audit. At the end of the semester, the undergraduate level is added to the course, which allows the credit to be displayed in the undergraduate audit. Therefore, it is important to look for situations where the student may be "missing" an item that will be fulfilled by the mixed credit.

Degree in Bachelor of Arts INCOMPLETE

Catalog year: Fall 2018

IMPORTANT DEGREE AUDIT PROCESSING INFORMATION: Students who are registered in a course which is a repeated attempt of a course in which a passing grade (A to D grade) was already earned will have the course's credit hours reflected in both hours earned (from the initial attempt) and in-progress hours (from the current attempt) until after grade and repeat processing occurs at the end of the semester. As such, you should deduct the repeated course from any hours counts (e.g. major requirements, 40 hour upper division, 120 minimum credit hours) during the period of repeat enrollment until the appropriate repeat code is assigned. If you are taking a course with the intention of receiving credit for both attempts, please check the undergraduate catalog to ensure the course can be repeated and/or that you are not exceeding the repeatable limit of the course as this will also be adjusted during end of term repeating processing.

IMPORTANT DEGREE AUDIT PROCESSING INFORMATION: Mixed credit courses are not added to a student's undergraduate academic record until end of semester processing. Therefore, mixed credit courses will not appear on the degree audit until then. This may cause requirements to appear unmet and hour counts to appear lower than the final count.

IMPORTANT DEGREE AUDIT PROCESSING INFORMATION: Students who are eligible for an exception to the 20 out of the last 30 hours residency requirement (Study Away students, West Plains completion program students, Medical Technology/Radiography students) should contact the Office of the Registrar during their final semester of coursework to have this requirement waived on their degree audit.

Degree Audit Links

Located at the end of the header row, the Links section contains links to various University websites that may be helpful to MSU students and advisors. It includes the following:

- Degree Works Homepage
- Major/Minor/Certificate Code Sheets
- Undergraduate Catalog
- Graduate Catalog
- Commencement Information
- Core 42 Resources
- GPA Calculator
- Holds Contact Information
- Transfer Equivalencies
- Advisor Toolkit

Missouri State.   DEGREE AUDIT   EXCEPTIONS   PLANS   TRANSFER   ADMIN   LINKS

Section 2: How To Use The What-If Degree Audit

A "what-if" degree audit allows the user to see what their degree audit would look like if they were to change programs or catalogs prior to formally requesting the change.

Between the first and second block (below the ID block and above the format/degree progress block), there is an area where you can select the type of degree audit you want. Click on "What-If"

Major Finance/Corp & Invest (BS)   **Level** Undergraduate   **Classification** Junior

MSU Cumulative GPA 3.720   **Combined Cumulative GPA** 3.733   **Holds** FT

Academic   What-If

Format
Student View

Degree progress

71%

Requirements

Next, select the "Degree" and "Catalog Term" you wish to use in the what-if audit. This information will initially default to the degree and catalog year found on the student's regular audit. The catalog year will typically be changed to the current semester. In the "Areas of Study" section, select the majors and minors you wish to pursue. The major (includes certificates as well) selection menu is filtered based on the degree selected. The minor selection menu is not filtered. Users should only select minors available in the same degree type as the degree selected. Each minor lists the corresponding degree information in parathesis behind the minor title. At the end of these menus, there may be programs that begin with "z-." These programs are no longer available.

Additional majors and minors may be selected in the Additional Areas of Study section. First, click the down arrow at the end of the Additional Areas of Study row. This will make a button with a plus sign available. Click it and an additional major and minor field will appear. You can select an additional minor and/or additional major. Major will be filtered by the degree type selected for the what-if audit and minor will not be filter, similar to the opening section of the what-if audit. Click the add button to add your selection. Additional majors and/or minors may be added by clicking the plus button and repeating the above process.

There is also the ability to add courses to the audit that you are thinking about taking in the future to see where they would fit. You can do this in the "Future Classes" section. You add the subject and number, and then click "Add." There are checkboxes that are checked by default to indicate whether you wish to include in-progress (current semester) classes and pre-registered (future semester) classes. When finished, click the "Process" button to review the what-if degree audit.

What-If Analysis   ^

☐ Use current curriculum   ☑ In-progress classes   ☑ Preregistered classes

Program

| Catalog year * | Degree * | Level * |
| Spring 2021 | Bachelor of Science (BS) | Undergraduate |

Areas of study

| Major * | Minor |

Additional areas of study   ^

| Major | Minor |

                                                    CANCEL   ADD

                                    +

Future classes

| Subject | Number | ADD |

                                            RESET   PROCESS

Section 3: How To Use the Student Educational Planner (SEP)

The Student Educational Planner (SEP) is an online tool that allows students (or an advisor on the student's behalf) to create an individualized plan for completing requirements as they proceed towards graduation. Used alongside your degree audit, the user can place requirements semester-by-semester into the SEP plan to anticipate time to graduate. Access to the SEP is through the same link used to access the degree audit.

SEP Initial Plan Creation from a Template (Preferred Method)

Click on the "Plans" link found at the top of the degree audit.
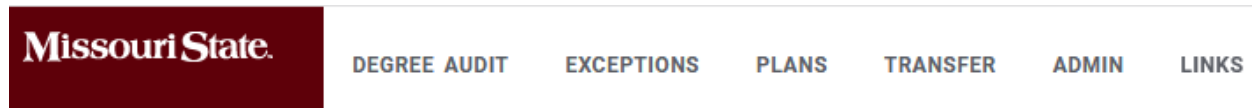
If the student has no plan, it will be blank. Click the "New Plan" button at the bottom right.

When creating an initial plan, you will be asked if you wish to create a plan based on a template or if you would like to start from scratch. Click "Select Template."

Select the first fall term (or semester) that should be included (NOTE: If the student is starting in spring or summer, there will be an opportunity to address that later). Search for the template you wish to use. Undergraduates will likely use one of the "UG- General Education (Effective fall 2014)" or the "UG-Core 42 (Effective fall 2018)" templates. Click on the desired template title. When you do, it will automatically create the template framework.

Create plan from template

Select starting term *
Fall 2020 ⌄

Search templates
UG-General

Description ↑	Level	Major	Degree	Catalog year	Term scheme	Who	What	Modified
UG-General Education (Effective fall 2014)	UG	0000	BS	201440	COMPLETE_SCHEDULE_SEMESTERS	M00096698	DASH	5/6/2020

Next, retitle the create plan by clicking the pencil (Edit plan) button to the right of the plan title, which will default as the template title.

Student ID
M⬛⬛⬛⬛⬛   ×

Name
⬛⬛⬛⬛⬛⬛

Advanced search

Major Finance/Corp & Invest (BS)   **Level** Undergraduate   **Classification** Junior

MSU Cumulative GPA 3.720   **Combined Cumulative GPA** 3.733   **Holds** FT

UG-General Education (Effective fall 2014) ✎ ⬜

In the Edit Plan box, retitle the plan using the following naming convention and click save when finished:

<Last name, First name BearPass number (or M-Number) SEP Plan).

Edit Plan   ×

Description *
Bear, Boomer M0000001 SEP Plan|

☐ Active   ☐ Locked

CANCEL   **SAVE**

The initial plan is now created and ready for editing.

SEP Initial Plan Creation from Scratch
Click on the "Plans" link found at the top of the degree audit.

Missouri State.   DEGREE AUDIT   EXCEPTIONS   PLANS   TRANSFER   ADMIN   LINKS

If the student has no plan, it will be blank. Click the "New Plan" button.

When creating an initial plan, you will be asked if you wish to create a plan based on a template or if you would like to start from scratch. Click "Blank Plan."

Select the first fall term (or semester) that should be included (NOTE: If the student is starting in spring or summer, there will be an opportunity to address that later). Click "Submit."

In the Edit Plan box, retitle the plan using the following naming convention and click save when finished:

<Last name, First name BearPass number (or M-Number) SEP Plan).

The initial plan is now created and ready for editing.

SEP Term Editing

This section covers how to make basic term edits to the SEP.

Adding a Term

Click the "Add term" button in the upper right portion of the SEP plan field.

The Add Term box will open. In the "Select term" field, select the next term you wish to add and click the "Add" button. Repeat this process until all desired semesters are included.

Deleting a Term

Click the ellipse (three dots) button to the right of the semester you wish to delete. Click the "Delete this term" link.

You will get a Delete Term confirmation box. Before deleting, make sure that there is no planned coursework existing on that semester that you wish to keep as it will be deleted as well if you delete the term. Once you are ready to delete it, click the "Delete term" button.

Reassign a Term

Click the ellipse (three dots) button to the right of the semester you wish to delete. Click the "Reassign this term" link.

Spring 2021
Credits: 0.0

More information

Delete this term
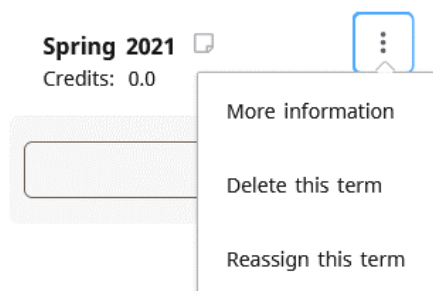
Reassign this term

You will get a Reassign Term confirmation box. Before reassigning, make sure that the reassigned semester does not already exist in your SEP plan as you cannot have two semesters with the same semester assignment. Once you are ready to reassign it, click the "Reassign" button.

Reassign Term ✕

Reassign to which term?

Select term * ⌄

CANCEL   **REASSIGN**

SEP Requirement Types

There are four types of requirements (or items) that you can add to an SEP plan. The Requirements menu is located on the left navigation bar of the SEP.

☰

< **Requirements** >

Choice +

Course +

Placeholder +

Test Score +
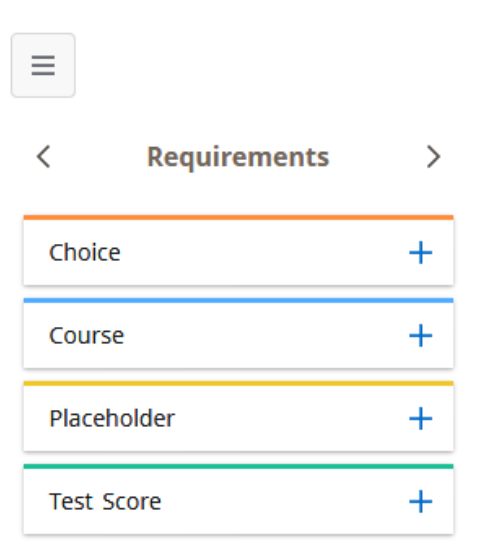
Course

This requirement type is used to add one specific course to an SEP plan. To select the Course requirement, click the "+" sign to the left of the Course requirements field. This will open a "New Requirement box with the "Requirement type" of course selected. The next field down is "Term", where you will select the semester in which the course will be completed. Next, check the "Critical" checkbox.

In the "Course requirement" box, begin to type either the prefix/number or title of the course you wish to select. After you type the first few characters, it will begin to display matching choices. Once you see the course you want, you can click on it rather than type out the rest of the characters. If you select from the menu, the next field "Credits" will fill in by default. This is the number of credits the course is worth. If it does not fill in manually, you must fill it in. Variable credit courses will default to the high end of the credit range, so if you need it for less than the maximum, you can change it.

For the minimum grade, enter "D+" for undergraduates or "C" for graduates unless the course is part of a program that requires a minimum grade higher than that. When finished, click the Save button in the lower portion of the New Requirement box.

Choice

This requirement type is used to add a requirement where the user selects one out of multiple presented options. To select the Choice requirement, click the "+" sign to the left of the Choice requirements field. This will open a "New Requirement box. The next field down is "Term", where you will select the semester in which the course will be completed. Next, check the "Critical" checkbox.

In the "Choice requirement" box, begin to type either the prefix/number or title of the course you wish to select. After you type the first few characters, it will begin to display matching choices. Once you see the course you want, you can click on it rather than type out the rest of the characters. To add the next choice, click "Add" on the right side of the Choice requirement title line. Continue to add the additional choices following these procedures. If you wish for a choice to have paired classes (Example: Take

course A or take both courses B and C), you can do this utilizing the "Add a paired course or lab" link below the entry of the course to which you wish to add the pair.

For credits, enter the lowest number of credits that will fulfill this choice. For example, if you put a 3-credit course or a 4-credit course as the two choices, you would enter "3" in the Credits field. For the minimum grade, enter "D+" for undergraduates or "C" for graduates unless the course is part of a program that requires a minimum grade higher than that. When finished, click the Save button in the lower portion of the New Requirement box.

Placeholder

This requirement type is used when you know general characteristics about the type of course you plan to take, but not what the specific course will be. This can also be used when you wish to add a reminder about an event or item, an advising situation, or add information such as a website for future reference. Below are the types of placeholders available:

- Advisement-This is a placeholder to use when there is something you need to discuss with your advisor. For example, if you wished to discuss accelerated master's degree options with your advisor during your sixth semester, you could add a placeholder to remind you of this.

- Comment-This is a placeholder to use when there is an item you wish to make sure to participate in during a particular semester. For example, if you want to participate in a career fair, you could remind yourself to do this during a particular semester.

- Elective-This is a placeholder for when you just want to take a random elective for fun or, for undergraduates, for your 120 minimum credit hour count or 40-hour upper division count.

- Requirement Choice-This is a placeholder for when a course is meant to fulfill a specific degree audit requirement, but you don't know what course you plan to take yet.

- Transfer- This is a placeholder to account for situations where you are taking a course at another institution. This is helpful for your academic advisor in terms of being aware of the additional course load that they may not know about since you are not taking it at MSU.

- Videos and Resources-This is a placeholder to save information you want to refer to later about an item. While you cannot paste in text as a hyperlink, you can paste it into the requirement notes (discussed later) as general text which you can later copy and paste into a web browser.

To select the Placeholder requirement, click the "+" sign to the left of the Placeholder requirements field. This will open a New Requirement box with a default Requirement Type of "Placeholder." The next field down is "Term", where you will select the semester in which the item/course will be completed.

The next field is "Placeholder." This is where you pick the type of placeholder you wish to use based on the previous placeholder descriptions.

In the "Value" box, begin to type a text description of the item/course. For example, if you plan 3 credits of general elective towards graduation, you might type "General elective for 120 minimum/40 UD (3 credits)." It is recommended to always include the credits in parenthesis as this requirement type does not present an option to select the number of credits. You are limited in characters here, but there is a way to provide additional information later in these instructions. When finished, click the Save button in the lower portion of the New Requirement box.

New Requirement   ✕

| Requirement type |
| Placeholder |

| Term * | ⌄ |

| Placeholder * | ⌄ |

| Value * |

CANCEL   SAVE

Test Score

This requirement is the least used of the four requirement types. This is for situations where there is an exam requirement housed outside of a course that must be completed as part of a program requirement. For undergraduates, the most common is the University Exit Survey, although some

programs have additional program-related exams. For graduates, the most common is comprehensive exams and/or thesis defense tracking.

To select the Test Score requirement, click the "+" sign to the left of the Test Score requirements field. This will open a New Requirement box with a default Requirement Type of "Test Score." The next field down is "Term", where you will select the semester in which the item/course will be completed. Next, check the "Critical" checkbox.

Next, click the "Test code" field to pick from the selectable test code options. For the minimum score, enter a value of "Y" which represents "yes" for completion of the exam. When finished, click the Save button in the lower portion of the New Requirement box.

NOTE-This requirement will later be recorded as met once the corresponding test value is recorded on the student's test score record.

New Requirement   ✕

> Requirement type
> Test Score

> Term *   ⌄

☐ Critical

> Test code *   ⌄

> Minimum score *

CANCEL   **SAVE**

SEP Navigation and Editing

This section is designed to help you navigate the SEP and make changes to items existing from use of a template or changing items you previously added to the SEP plan

Semester Transition

You can back and forth between semesters using the "<" and ">" arrows found in the upper left just above the semester grid in the SEP plan.

〈 〉   ADD TERM   ⛶

Fall 2020 ⬚ ⋮	**Spring 2021** ⬚ ⋮	**Summer 2021** ⬚ ⋮
Credits: 0.0	Credits: 0.0	Credits: 0.0
+	+	+

Course Editing Options

There are a number of editing options for SEP requirements. They are described below and can be accessed by clicking the ellipse (three dots) button to the right of the requirement.

Fall 2020
Credits: 3.0

```
              +

ENG 110                    ⋮
Credits: 3.0
Minimu
        More information

        Edit this requirement

        Delete this requirement

        Reassign this requirement
```
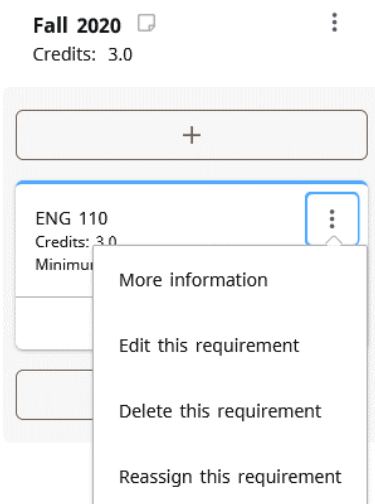
More Information (CourseLink Information)

To see CourseLink information for a course such as prerequisite, course description, date/time offering for open registration semesters, and seat availability, click the ellipse next to the course and select the "More information" link.

Edit This Requirement

To edit the requirement, taking you back to the original entry screen for the requirement, click the ellipse next to the course and select the "Edit this requirement" link.

Delete This Requirement

To delete the requirement off of the SEP plan, click the ellipse next to the course and select the "Delete this requirement" link. When the Delete Requirement confirmation box opens, click the "Delete requirement" button.

Delete Requirement   ✕

Are you sure you want to permanently delete this requirement?

CANCEL   **DELETE REQUIREMENT**

Reassign This Requirement

To reassign the requirement to a different semester within the SEP plan, click the ellipse next to the course and select the "Reassign this requirement" link. When the Reassign Requirement confirmation box opens, select the semester you wish to change it to in the "Term" box and click the "Reassign" button.

Reassign Requirement ✕

Reassign to which term?

Select term * ⌄

CANCEL   **REASSIGN**

NOTE: You may also reassign a requirement by hovering your mouse over a requirement, holding down a single left click, and drag and drop it on the semester you wish to assign it to.

Add Requirement Notes

Users have the ability to add additional information to a requirement in the form of a requirement note. To do this, click on the notepad in the bottom right corner of the requirement to which you want to add the note.

ENG 110
Credits: 3.0
Minimum grade: D
⋮

This will open a Requirements Notes box. If there is no existing note, it will have a button you can click to add a new note.

Requirement Notes ✕

There are no notes.

ADD A NEW NOTE

Type the note you wish to add (or paste in text you have copied from something else). Click the "Save Note" button when finished.

Add a new note ✕

Add description
This is my example note.

CANCEL   SAVE NOTE

SEP Degree Audit

Users can see what their planned courses look like in a degree audit by clicking the "Audit" link in the top left just above the SEP plan. The audit will open in a separate window for viewing.
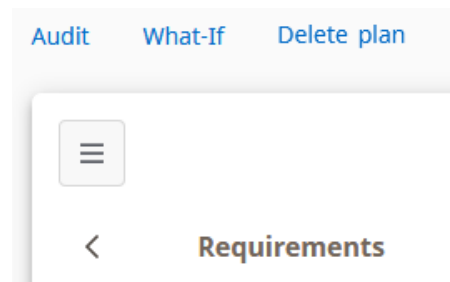
SEP Still Needed

Users can see a "list view" of unmet requirements by navigating to the "Still Needed" list. To find this, click the right arrow by the Requirements header.
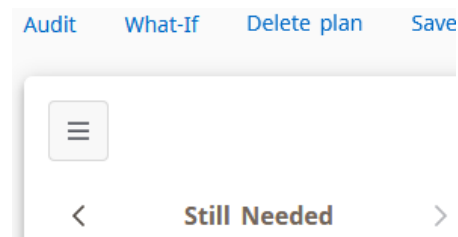
This will show requirements that do not have a specifically planned courses associated with it. After drilling down to see the specific courses listed, users may click and drag any course they wish to add to their plan to the corresponding plan semester as an alternative way to add the course to the plan.
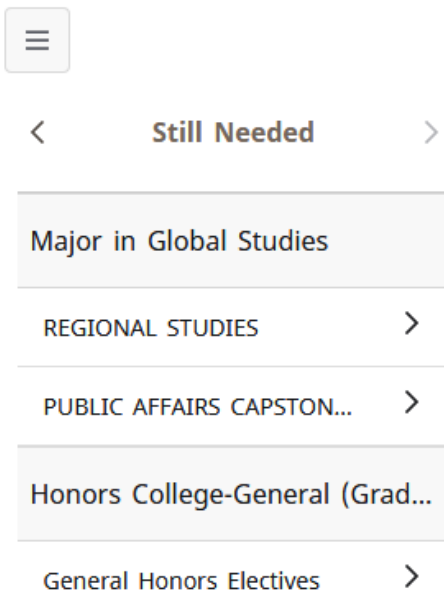
SEP Courses

Users can see a "list view" of university courses by navigating to the "Courses" list. To find this, click the left arrow around the Requirements header.

This will show a list of courses built in Banner. After drilling down to see the specific courses listed, users may click and drag any course they wish to add to their plan to the corresponding plan semester as an alternative way to add the course to the plan. This does include old courses that are no longer offered.

SEP Plan Activation and Locking

When an initial SEP plan is completed and ready for use, the user should activate the plan. To do this, the user should click the pencil icon to the right of the SEP plan title to open the Edit Plan box.

Once open, the user should check the "Active" checkbox. This indicates the plan is now active and being followed. Students will only see the "Active" checkbox. Advisors and Registrar staff will also see a "Locked" checkbox. If an advisor checks the "Locked" checkbox, it means the advisor has reviewed and approved the plan and locked it so there can be no further changes without the student contacting them. One benefit of locking the plan is that it cause plan tracking to be turned on so the plan will have an indicator on their plan that shows whether the student is on-track or off track with their plan.

SEP Plan Deletion

If the user wish to end their existing plan and start over, there are two ways that an SEP plan can be deleted.

Option 1: Click Delete Plan in the menu just above the SEP Plan.
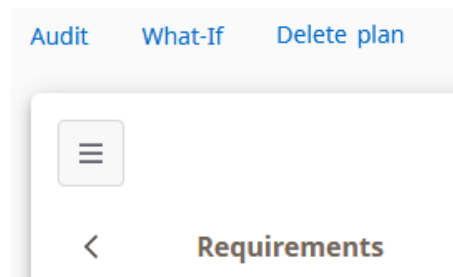
Option 2: Click the Plan List button to the right of the plan title and then the trash can at the end of the plan's listing on the Plan List

Using either option will take the user to the Delete Plan confirmation box. To delete the plan, click the Delete Plan button. Once deleted, there is no way to retrieve the plan.

Section 4: Exception Processing

Exception processing is used when a department (or authorized University administrator) wishes to record the approval of a course substitution, waiver, or requirement adjustment in the degree audit system.

Exception Access

All Office of the Registrar staff members have exception processing access as part of the Registrar security role. OR staff processes approvals made by the Provost's Office (typically through the Associate Provost-Student Development and Public Affairs) or designated committees such as the Degrees Committee. For majors/minors/certificates, department head are granted access upon their installation as the department head. The department head has the authority to expand access to other designees by

submitting their request to the Associate Registrar-Degree Programs and Advisement Support. For graduate programs, Graduate Program Directors are granted access through Graduate College approval and the approval is processed by the Office of the Registrar.

Exception Application Rules

There is not a way to limit exception access by department, so authorized exception processers are expected to follow the following exception application guidelines.

Degree audit blocks a department head may adjust	Degree audit blocks a department head may not adjust
Major in (a major belonging to the adjusting department head) except for major GPA and residency as those are University rules	Degree blocks (Degree in …). This includes the 120 minimum hours, 40 hour upper-division, cumulative GPA, exit exam, and any other requirements in this block. If you think something should be adjusted, the adjustment must be received by the Office of the Registrar through the approval of the proper authority.
Minor in (a major belonging to the adjusting department head) except for minor GPA and residency as those are University rules	General education or Core 42 block. This is true even when the potentially waived course is from the department head's department as all general education waivers are processed through the Office of the Registrar through the approval of the proper authority.
Major or department-related admission requirements (for a major belonging to the adjusting department head)	Other blocks such as secondary education requirements, even if associated with a department related discipline.
	Major in … blocks belonging to another department
	Minor in … blocks belonging to another department
	Bachelor of Arts degree requirement blocks
	Honors College requirements

Exception Processing-Adding an Exception

Login to Degree Works. Open the degree audit of the student for which you wish to enter an exception. Click the Exceptions tab at the top of the degree audit screen.
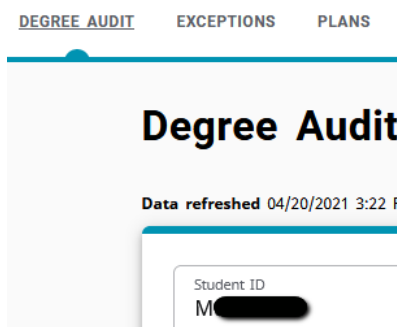
The "exception" view of the degree audit will open. Scroll down to the portion of the degree audit you wish to change and click the radio button to the left of the requirement to change. Click the plus (+) sign button to the left of the requirement.

This will open an Add Exception box. In the "Exception type" box, select the type of exception you wish to enter. Once you do this, the information fields for the respective exception type will open. See the Exceptions Type section below for additional information on the various types of exceptions available and instruction on how to complete them.

After filling out the exceptions field's, click in the **Description** field. Make sure the field is blank and click **Add Exception**. When you do this, a message will appear indicating the description field was left blank and will default a sample description. Click the "X" in the top right of description field warning message.

Add Exception   ×

Exception for: Focus on Cultural Competence

Exception type
Also Allow   ⌄

Allow   Subject *   Number *
            ABC   123

With   Qualifier ⌄   Operator ⌄   Value

Description *
Allow ABC 123 to apply here.

Details

                                    CANCEL   ADD EXCEPTION

This puts the action you performed in the description field. It is recommended to add the program to which it's being applied towards such as "-History major" or "-Psychology minor".

The "Description" field used in exceptions is 50 characters long. There may be instances where you wish to provide internal documentation as to why an exception was made. You can use "Details" box for this. It is optional. Here you can type additional text up to 220 characters. When finished, Click **OK.** This message will not be viewable to those who only have a "Student" user role, but will be viewable to any user with any other role. It will be viewable as a pop-up hint over the exception description.

When finished, click the "Add exception" button.

Add Exception   ×

Exception for: Focus on Cultural Competence

Exception type
Also Allow   ⌄

Allow   Subject *   Number *
            ABC   123

With   Qualifier ⌄   Operator ⌄   Value

Description *
Allow ABC 123 to apply here-GE Cultural Competence

Details

                                    CANCEL   ADD EXCEPTION

Exceptions will be visible in two locations. One of them is immediately below the requirement to which the exception was applied. The other is the Exceptions section located towards the end of the degree audit.

	Focus on Cultural Competence	Still needed:	1 Class in **ANT** 100 or **COM** 260 or **ENG** 289 or **GRY** 100 or **IDS** 297 or **LLT** 180 or **MCL** 200 or **MTH** 121 or **REL** 100 or 210 or **SWK** 219 or **ABC** 123
		Exception by: ▮▮▮ **On:** 04/23/2021 **Also Allow:**	Allow ABC 123 to apply here-GE 🗑 Cultural Competence

Exceptions   ⌃

                                                                                                           🗑

	Type	Description	Created on	Created by	Block	Enforced
☐	Also Allow	Allow ABC 123 to apply here-GE Cultural Competence	04/23/2021	▮▮▮	General Education Requirements	Yes

Exception Processing-Deleting an Exception

Login to Degree Works. Open the degree audit of the student for which you wish to enter an exception. Click the Exceptions tab at the top of the degree audit screen.

DEGREE AUDIT   EXCEPTIONS   PLANS

Degree Audit

Data refreshed 04/20/2021 3:22 P

Student ID
M▮▮▮

The "exception" view of the degree audit will open. You cannot edit an exception. To correct a mistake, you must delete the old exception and enter a new exception. Scroll down and find the exception you wish to remove. This can be either exception view (located at the requirement, located in the exception box in the bottom).

If you go to the requirement location, you just need to click the Remove Exception icon, which is a trash can located on the right side of the exception row. If you go to the Exceptions section, click the check box to the left of the exception you wish to delete and then click the Remove Exception icon, which is a trash can located in the upper right portion of the Exceptions box.

	Focus on Cultural Competence	Still needed:	1 Class in **ANT** 100 or **COM** 260 or **ENG** 289 or **GRY** 100 or **IDS** 297 or **LLT** 180 or **MCL** 200 or **MTH** 121 or **REL** 100 or 210 or **SWK** 219 or **ABC** 123
		Exception by: ▮▮▮ **On:** 04/23/2021 **Also Allow:**	Allow ABC 123 to apply here-GE 🗑 Cultural Competence

Exceptions

	Type	Description	Created on	Created by	Block	Enforced
☐	Also Allow	Allow ABC 123 to apply here-GE Cultural Competence	04/23/2021	▆▆▆▆▆▆	General Education Requirements	Yes

The removal will be immediate without a warning box. A gray box will pop open in the upper right portion of the screen indicating that the exception was removed.

⊘ Exception removed
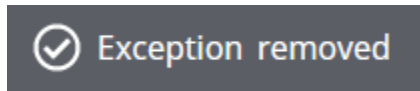
Exception Types

Also Allow

This exception is used to add a course to a requirement list. For example, if there are five acceptable courses to pick from and you wish to add a sixth course, and it does not matter which of the six courses the student takes, you would use this exception. This type of exception should also be used when a student has a course in progress, has not taken a course yet, or incomplete grade. The "Allow" subject and number field must be typed in. If it is a transfer course, it should be the MSU equivalency, not the original number at the other institution. The second line "With" field can be used to provide additional qualifiers to the substitution as explained in the Exception Filtering section of this guide. Additional qualifiers are optional and can be left blank if not needed. A description explaining the location of the action and describing the action should be included.

Add Exception   ✕

Exception for: Focus on Cultural Competence

Exception type
Also Allow ⌄

Allow   Subject *   Number *
         ABC   123

With   Qualifier ⌄   Operator ⌄   Value

Description *
Allow ABC 123 to apply here-GE Cultural Competence

Details

CANCEL   ADD EXCEPTION

Apply Here

This exception is similar to Also Allow but is more powerful and is used to absolutely assign a specific course to a requirement. Examples where this could be used is when pass/not-pass is not allowed but you want to apply a pass course any way. Another example is when a course can fill multiple requirements but cannot be shared, so you wish to move a course from one place to the other. Only use this exception when the course has a final passed grade. The reason for this is if a student receives an F grade in a class, it will still apply using this exception. The "Allow" subject and number field must be typed in. If it is a transfer course, it should be the MSU equivalency, not the original number at the other institution. The second line "With" field can be used to provide additional qualifiers to the substitution as explained in the Exception Filtering section of this guide. A description explaining the location of the action and describing the action should be included.

NOTE: There are rare times when this exception must be used with an in-progress report, such as to allow a double count. In those cases, you must use exception filtering of "DW Grade Number" "equal to or greater than" "1.0." (1.0 is the same as a grade value of D). If the exception is being entered to allow an in-progress pass/not-pass course to apply, you must use exception filtering of "DW Grade Letter" "equal to or greater than" "P".

Add Exception   ✕

Exception for: Focus on Cultural Competence

Exception type
Apply Here   ⌄

Apply   Subject *   Number *
             ABC   123

With   Qualifier   ⌄   Operator   ⌄   Value

Description *
Apply ABC 123 here-GE Cultural Competence

Details

CANCEL   ADD EXCEPTION

Force Complete

This exception is used when you have no specific action you desire to take such as substituting or waiving a course. This is a way to tell Degree Works that a requirement should be marked as okay without any additional action. It is a very powerful exception and should be among the least used exceptions. Since there is no action to take, the only information to enter is a description of why you are forcing the requirement to be complete. A description explaining the location of the action and describing the action should be included.

Add Exception　　　　　　　　　　　　　　✕

Exception for: Focus on Cultural Competence

Exception type
Force Complete　⌄

Description *
GE Cultural Competence waived

Details

CANCEL　　ADD EXCEPTION

Substitute

This exception is used when you wish to remove one course from a requirement and replace it with a different course. The "Change" fields must have the course subject code and number typed in that you wish to remove. The "To" fields must have the course subject code and number typed in that you wish to add. The second line "With" field can be used to provide additional qualifiers to the substitution as explained in the Exception Filtering section of this guide. A description explaining the location of the action and describing the action should be included.

Add Exception　　　　　　　　　　　　　　✕

Exception for: Focus on Cultural Competence

Exception type
Substitute　⌄

Change　　Subject *　　　　Number *
　　　　　MCL　　　　　　200

To　　　　Subject *　　　　Number *
　　　　　ABC　　　　　　123

With　　Qualifier　⌄　　Operator　⌄　　Value

Description *
Replace MCL 200 with ABC 123-GE Cultural Comp

Details

CANCEL　　ADD EXCEPTION

Remove Course and/or Change the Limit

This exception has multiple functions. The first function is the ability to remove a course from a list. This is another alternative available to maneuver courses to a desired location on the degree audit. The "Remove" subject and number fields can be filled in by typing the subject and number.

The second function is the ability to change the number of credits or classes in a requirement. This includes both raising and lowering a limit. Raising could be used when a department wishes to have additional courses pulled into a major/minor for inclusion in the requirement in order to allow for the improvement of major/minor GPA. In these cases, it may need to be paired with an "Also Allow" or "Apply Here" exception. Lowering could be used when a department wishes to waive one course out of a requirement that requires multiple courses.

The "Change Limit" box has a Units drop-down menu to the right. The choice made in this box should match the language used in the requirement. For example, if a requirement says "Complete 9 credits" and you wish to reduce it to 6 credits, you would select "Credits" in the Units drop-down menu. If a requirement says "Complete 3 classes" and you wish to reduce it to 2 classes, you would select "Classes" in the Units drop-down menu.

You can use both function in the same exception transaction. A description explaining the location of the action and describing the action should be included.

Add Exception   ✕

Exception for: Focus on Cultural Competence

Exception type
Remove Course and/…   ⌄

	Subject	Number
Remove	ABC	123

	Limit	Units
Change	2	Classes ⌄

Description *
Remove ABC 123 and change to 2 classes-GE Cult Com

Details

CANCEL   ADD EXCEPTION

Exception Filtering

Sometimes when entering a Degree Works exception, you need to use a course in your exception that appears more than one time on the degree audit. The most common situations are repeatable variable topic courses or transfer electives. Degree Works provides some filters you can use to delineate the course you wish to use in your exception. The filter option is found on the Substitute, Also Allow, and Apply Here exception types and begins with the word "With". There are three filtering menus used in exception filtering: Qualifier, Operator, and Value. The qualifier is the criteria you wish to filter by. The Operator is where you tell the filter to look for higher, lower, or equal to the value, and the Value is the value you are looking for in the qualifier.

With	Qualifier ⌄	Operator ⌄	Value

Below is a description of how to use these filters. This focuses on the most commonly used.

Filtering by Term

This is a filter you would use when the courses in question were completed in different terms (semesters). The term format must be Banner term format which is a six-digit number that is entered in the following format: First four digits (year); last two digits (semester indicator: 20 for spring, 30 for summer, 40 for fall). The qualifier is DW Term.

With	Qualifier: DW Term ⌄	Operator: equal to ⌄	Value: 202040

Filtering by Grade

This is a filter you would use when you want to filter by grade. For example, a student takes two ABC 397 courses in the same semester so you cannot filter by term. The student earned an A in one and a B in the other and you wish to substitute the one where a B was earned. Plus/minus grading is supported with this. You can also use an operator of "equal to or greater than" in a situation where an in-progress course could be substituted only if a minimum grade level is earned. The qualifier is DW Grade Letter.

With	Qualifier: DW Grade... ⌄	Operator: equal to ⌄	Value: B

Filtering by Credits

This is a filter you can use when a student has multiple courses with the same term and grade, but a different number of credits. The qualifier is DW Credits.

With	Qualifier: DW Credits ⌄	Operator: equal to ⌄	Value: 2

Filtering by Section

This is a filter you can use to filter by MSU section number (not CRN). However, if the student had the same course in different semesters, and the same section number on each of those courses, this would

not work. It must be a three-digit number when entering a numerical section (i.e. use 004 instead of 4). The qualifier is DW Section.

With
| Qualifier | Operator | Value |
| DW Section ∨ | equal to ∨ | 003 |

Filtering by Originating Transfer Course Prefix and Number

This is a filter you can use to delineate between transfer electives. You can get the originating transfer number from the degree audit. It is recommended to copy and paste this number so that you get the exact prefix/number format and spacing. The qualifier is DW Transfer Course.

With
| Qualifier | Operator | Value |
| DW Transf… ∨ | equal to ∨ | ABCD1234 |

Filter by Course Title

This is a filter you can use to delineate between MSU (not transfer) course titles. This is used on variable topic courses where the department changed the displayed course title when the course was built. It is recommended to copy and paste this from the audit

With
| Qualifier | Operator | Value |
| DW Title ∨ | equal to ∨ | Ancient Egypt |

It is recommended to consult with Office of the Registrar staff is additional filtering is needed that is not covered within the above filters. There are additional filters available in the Qualifier menu but these are rarely used and may require additional guidance.

Exception Management/Reporting

This is a new feature available in Degree Works 5.0.3. This allows users with access to run reports to identify exception usage by various criteria. This may be helpful in identify commonly entered exceptions, exception volume by exception processor, and in monitoring appropriate exception application by block type.

To open Exception Management, hover over the Admin tab located at the top of the degree audit. This can be accessed from Worksheets or Exceptions. This will open a sub-menu. Click "Exception Management."

Missouri State.   DEGREE AUDIT   EXCEPTIONS   PLANS   TRANSFER   ADMIN   LINKS
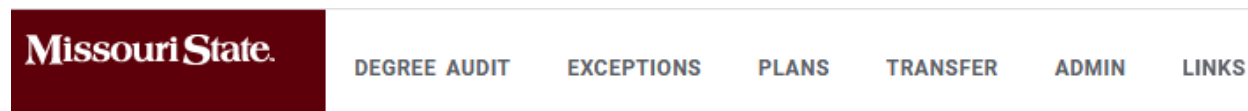
This will open the Exceptions Report search criteria box. Available search criteria include the following:

- Show exceptions from: Values include Last week, Last 30 days, Last 6 months, Last year, Show all.
- Show exception type: Values include the five different exception types.
- Status filter: Users should leave this on Show all statuses. Other filters are to find broken exceptions.

- Exceptions created by ID: This is used when you want to find exceptions entered by a specific individual. The ID used is BearPass number (M-number).
- Exceptions on student ID: This is used when you want to pull a list of exceptions for a specific student. The ID used is BearPass number (M-number). This is also viewable on the student's degree audit.
- Exceptions on requirement ID: This is used to find requirements that have been entered against a specific Scribe block. You must know the block's ID (or RA number) to use this filter. This value can be looked up in Scribe, or the block ID's found on a specific student's degree audit can be obtained in the Diagnostics Report available on the student's Worksheets tab.

You can use multiple filters at a time. For example, you could search for the exceptions done during the last 6 months by a specific user against a specific Scribe block. After selecting the desired criteria, click the "Run Exceptions Report" button. You can clear your criteria for a new search by clicking the Reset link.

Exception Management

Exceptions Report

Exceptions Report

Enter your search criteria

Show exceptions from	Show exception type	Status filter
Last 30 days	Show all	Show all statuses

Exceptions created by ID	Exceptions on student ID	Exceptions on requirement ID

Reset **RUN EXCEPTIONS REPORT**

This will open a report of the exceptions fitting the selected criteria. Just below the filter, the user will have the option to select "Show Exception Details" or "Show Requirement Block Counts." Click the desired format, which is described below, by selecting the corresponding radio button.

Reset **RUN EXCEPTIONS REPORT**

◉ Show exception details   ○ Show requirement block counts

Show Exception Details

This view is designed to give the user a detailed description of each individual transaction that meets the filter criteria. Data listed includes the creation date, creator ID, Scribe block ID, student who received the exception, the exception type, and description. An expansion arrow at the right side of the row allows the user to expand the entry to see greater description.

Created on ↑	Created by	Requirements	Type/Value	Label tag	Student ID	Type	Status	Description	
03/31/2021	██████	RA003852	MINOR / CHE2	22.51	██████	NN	OK	Added 2 course for Chem minor residency	˅
03/31/2021		RA003852	MINOR / CHE2	22.51		AA	OK	Allow CHM 399 to apply here-CHEM minor resi…	˅
04/08/2021		RA000039	DEGREE / BA	1.1		NN	OK	300 credits	˅
04/22/2021		RA003363	MAJOR / ANSC	13		RR	OK	Replace AGR 300 with CHM 201-Animal Science major	˄

Block title	Major in Animal Science
Type	Substitute
Status	OK - applied to audit successfully

Show Requirement Block Counts

This view is designed to give the user an aggregate summary of the number of transactions that meet the filter criteria. An expansion arrow at the right side of the row allows for exception to see a breakdown of applied exceptions by requirement label ID.

Requirements	Type/Value	Block title	Count ↓	
RA003852	MINOR / CHE2	Minor in Chemistry	2	˄

Label tag	Count
22.51	2

Requirements	Type/Value	Block title	Count	
RA003363	MAJOR / ANSC	Major in Animal Science	1	˅
RA000039	DEGREE / BA	Degree in Bachelor of Arts	1	˅

Section 5: Student Educational Planner (SEP) Template Management

NOTE: Program-specific templates have been discontinued effective November 2020, but this section remains in the guide for maintenance of existing templates and in case program-specific templates are utilized in the future.

The purpose of an SEP template is to contain the general academic plan of a program's current curriculum so that students may use it as a starting point to form their individual academic plan. In addition to courses, SEP templates can include prompts for departmental or advisement milestones and instructions including hyperlinks or videos. In this section, you will learn the basics about how a template works and how to maintain and/or create templates for your department's programs.

Template Management Access Location

In Degree Works, click the Admin tab at the top of the page. This will open a sub-menu. Click "Template Management."

Missouri State.   DEGREE AUDIT   EXCEPTIONS   PLANS   TRANSFER   ADMIN   LINKS

Template Management Authorization

In order to access SEP template management, you must be authorized by your department head and must participate in SEP Template Building and Maintenance 101 training. Users who meet this criteria receive the SEPTEMBU (SEP Template Builder Editor) user key. Users who do not have this key will not see the template management menu.

Current SEP Template Holdings

Between fall 2017 and spring 2019, a default SEP template was created for all undergraduate majors (and options as applicable) for any program that had a published four-year plan. Those four-year plans were compared to the current catalog requirements at the time of the review in order to identify any discrepancies and inefficiencies. Based on the findings, an SEP template was created with the best information available at the time. Therefore, the current template could contain an issue and/or have become outdated by curricular changes that have occurred since the time of that review. Departments were given the option to take over management of these templates or to have the template inactivated.

There are also default general education and Core 42 templates available for students who are in programs that do not offer a program-specific SEP template.

For these reasons, the majority of SEP template work consists of revision of existing SEP templates to update them to the most current catalog requirements. New templates will only need to be created if a new program is created and a program specific template is desired. In template management, there are both active (available to the public) and inactive (not available to the public) templates as template managers have access to see all created templates.

SEP Template Management Pre-Edit Preparation

Before you begin to edit an SEP template, you must be confident that your existing four year plan (which can be found at https://www.missouristate.edu/provost/degree-plans.htm) is in sync with your most current degree program requirements.

The recommended way to do this is compare your four-year plan to the catalog and literally check off that each item is in place. Some factors to consider as you do this:

- Is each general education requirement addressed? If your department requires any specific general education requirements in the catalog, you will want to specify those in your plan and SEP template, also ensuring that you have not built in both the specific class and left a generic space holder for that area of general education as well.
- Is each major requirement clearly addressed?
- Do you have any "hidden graduation requirements?" An example of this would be your program requires students to take ABC 124. ABC 123 is a prerequisite for this course but is not a general education course or listed in your major requirements, so students really need it, but it's not listed anywhere. In the long term, this should be addressed in your curricular requirements.
- Do you have extra courses included that are not listed in your program requirements?
- Have you accounted for minors and/or degree requirements (such as BA degree requirements) as applicable?

- Have you accounted for electives for the 120 minimum credits and 40-hour upper division requirements?
- Have you mentioned any opportunities to double count courses (such as the HST 103/104 and Philosophy BA degree requirements and General Education requirements)?

It is extremely helpful in the SEP template management process to work out any discrepancies in advance so you have a clear picture of what you want to build in the template. This includes any advice you may wish to provide related to a course or the ability to double count a course as these types of communications can be built into your SEP template.

You will also want to work with the person in your department who maintains your department web page to ensure any four-year plan changes are also made online on your four-year plan page. While the address above is a central depository page housed by the Office of the Provost, the actual plan is housed on your departmental web pages and can be changed by your department's website manager.

SEP Template Naming Convention

When the "Browse Templates" screen is open, columns can be sorted. However, the default display is alphabetical by description. The name convention for SEP templates is:

Level (UG/GR)-<Major title><Degree>/<Option title if applicable> (General education effective term)

It is important to follow the naming convention to make it easy for users to find the needed template.

SEP Template Management Browse Template Columns

Below is a chart that describes the columns found when opening SEP Template Management. This is based on the default "flat view." You will see a radio button where you can switch to "tree view" but this is not recommended.

Header	Value In The Column	Additional Notes
Description	SEP template title per naming convention	
Level	UG or GR	
Major	4-digit major code as applicable	General templates such as general education or Core 42 created to serve multiple majors will use 0000 (undecided) by default.
Degree	Applicable degree type	
Catalog Year	Banner catalog year (Year followed by 20 for SP, 30 for SU, 40 for FA)	This value should be the beginning date from which this template should be considered valid. For example, if a program changed requirements effective fall 2017 and nothing has changed since that time, the catalog term should be 201740 so users know if

		they are on the fall 2017 or later catalog that they are safe to use this template.
Term Scheme	Term scheme title selected from drop down menu. This dictates the number of semesters and type of semesters (SP/SU/FA) found in the template.	See the SEP Term Schemes section later in this document for a description of the available scheme types.
ID	This is a unique ID number assigned to a template when it is saved for the first time.	
Who	BearPass number (M-number)	This is the last user to edit the template.
What	SEP	Will fill in by default when saved.
Modified	Date	This was the last date a change was saved to the SEP template.

How to Open an SEP Template

Click on the name of the template you wish to open in the Description column. You may navigate pages using the page navigation buttons at the bottom of the search, by typing part of the template title in the "Search by template description" search box, or by using the Advanced search link (located below the "Search by template description" search box) to filter criteria.

Template Management

List of templates

Search by template description

Advanced search

NEW TEMPLATE

● Flat view ○ Tree view

Description ↑	Level	Major	Degree	Catalog year	Term scheme	ID	Who	What	Modified	
UG-General Education (Effective fall 2014)	UG	0000	BS	201440	COMPLETE_SCHEDULE_SEMESTERS	T0000012	M00096698	DASH	05/07/2020	🗑
zy-UG-General Education (Effective fall 1997)	UG	0000	BS	200940	COMPLETE_SCHEDULE_SEMESTERS	T0000003	M00096698	SEP	06/10/2019	🗑

|◁ 〈 Page 1 of 1 〉 ▷| Total results: 2

How to Revise an Existing SEP Template

Open the existing template for this program by clicking on the title in the description column.

List of templates

Search by template description
UG-Jelly ✕

NEW TEMPLATE

● Flat view ○ Tree view

Advanced search

Description ↑	Level	Major	Degree	Catalog year	Term scheme	ID	Who	What	Modified	
UG-Jellybean Studies	UG	0000	BS	202040	COMPLETE_SCHEDULE_SEMESTERS	T0000262	M00096698	DASH	06/25/2020	🗑

|◁ ◁   Page [1] of 1   ▷   ▷| Total results: 1

Change the "Catalog Year" to the first semester that the upcoming changes will be applicable. For example, if this is based on curriculum changes going into effect in fall 2020, you will change the catalog year to fall 2020. To do this, click on the Edit Template icon (pencil) to the right of the template title. This will open the Edit Template box. Change the Catalog Year field and click the Save button in the lower left portion of the Edit Template window.

UG-Jellybean Studies 🖉 ▢

Edit Template   ✕

Description *
UG-Jellybean Studies

Template ID
T0000262

Term scheme
COMPLETE_SCHEDULE_SEMESTERS

☑ Active

Required template tags

Level *
Undergraduate ⌄

Major *
Undeclared ⌄

Degree *
Bachelor of Science (BS) ⌄

Catalog Year *
Fall 2020 ⌄

Optional template tags   ⌄

CANCEL   **SAVE**

Make any applicable changes. Changes within the SEP template parallel the types of changes students/advisors can make to individual SEP plans. See section 3 of this document for information on the type of requirements that may be entered within a template. Remember to review any notes within the plan to ensure they are still applicable depending on if any of them are in a course the change would affect. As you make changes, it automatically saves after each transaction. You will see a gray Template Updated message in the upper-right corner of the page.

If this template is not already active, you will need to make it active for it to become visible to students. Conversely, while you are working on it, you may wish to make it inactive until you finish it so that only you can see it. The Active checkbox is found in the Edit Template box where you updated the catalog year. Click the Save button when the active box is checked/unchecked as desired.

Edit Template

Description *
UG-Jellybean Studies

Template ID
T0000262

☑ Active

How to Create a New Program Template by Copying from an Existing Template

Open the existing template for the program you wish to clone to make the new program template. You would want to select a template that has significant similarity to the new program.

Once open, click the "Save as copy" link which is located between the template header block and the main template display.

Catalog year Fall 2020

College Undergraduate College/Provost

Active Yes

Last updated: ▆▆▆▆▆▆▆ on 04/23/2021

Change term scheme   Save as copy   Delete template

≡

‹ ›

‹   **Requirements**   ›

This is open the Save as Copy box. Enter the name of the new program template and click the Save button.

Save As Copy   ✕

Please enter a unique template description.

Description *
UG-Bubble Gum Studies

CANCEL   **SAVE**

Click on the Edit Template icon (pencil) to the right of the template title. This will open the Edit Template box. Uncheck the "Active" checkbox and "Save."

Edit Template   ✕

Description *
UG-Bubble Gum Studies

Template ID
T0000263

Term scheme
COMPLETE_SCHEDULE_SEMESTERS

☑ Active

Open the Edit Template icon again. Change the Degree, Major, and Catalog Year fields as applicable. The catalog year would be the term in which the new program begins. When finished, click the Save button.

On occasion, you may need to change the term scheme (number and/or types of semesters). do this by selecting the term scheme needed from the "Change Term Scheme" button, which is also found within the Edit Template box. See the "SEP Template Term Scheme" section of this documentation for information on how to change this if needed.

Edit Template   ✕

Description *
UG-Bubble Gum Studies

Template ID
T0000263

Term scheme
COMPLETE_SCHEDULE_SEMESTERS

☑ Active

Required template tags

Level *
Undergraduate

Major *
Undeclared

Degree *
Bachelor of Science (BS)

Catalog Year *
Fall 2020

Optional template tags   ⌄

CANCEL   **SAVE**

You are now ready to begin placing courses. First, arrange the general education courses by clicking and dragging them to the corresponding semesters. In situations where a specific general education course is required, start by dragging the general category that course is part of to the corresponding semester for later adjustment.

Add the remaining courses, choices, and placeholders needed. All courses and choices should be marked as critical, have the minimum credits added, and the minimum grade assigned (which is D by default unless there is a specific higher grade required.) As you arrive in semesters where a specific general education course is needed, add the needed course separately. Copy the note information from the general education section to the note portion of the specific course. Uncheck the "general" general education item as critical and drag it to the end of the semester section.

When you are sure you no longer need the "general" general education listing where a specific course is required, you can delete them by clicking on their ellipse button and choosing "Delete this requirement" from the sub-menu. It is recommended to keep them until the end to make sure they are not needed anymore. If you will be copying from this template for additional options and/or degree types, it is recommended to hold them over if you think they might be needed on another version.
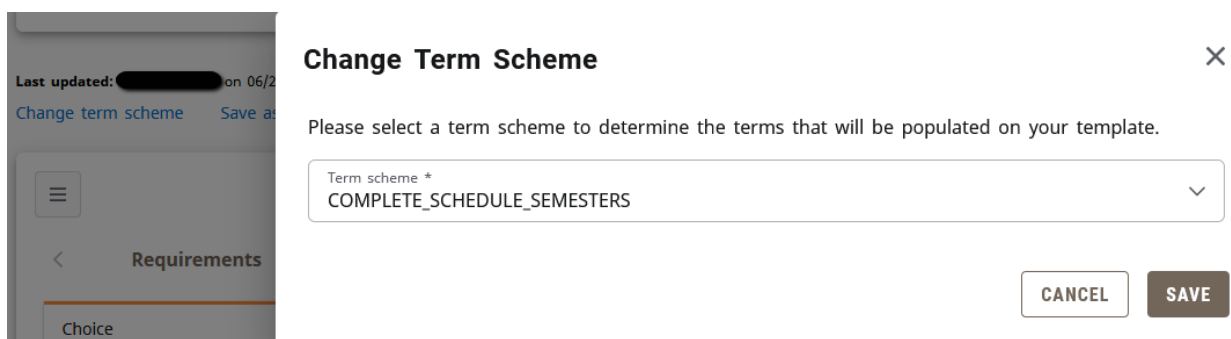
SEP Template Term Schemes

On occasion, you may need to change the number or types of semesters found in a SEP template. There are a number of existing term schemes already in place as described below.

Degree Works Student Educational Planner Schedule Semesters Templates (SEP002: Template Term Schemes)														
Template Name	FA 1	SP 1	SU 1	FA 2	SP 2	SU 2	FA 3	SP 3	SU 3	FA 4	SP 4	SU 4	FA 5	SP 5	SU 5
3YFASPSU	●	●	●	●	●	●	●	●	●						
5YRSSPFA	●	●		●	●		●	●		●	●		●	●	
7SFASPSU	●	●	●	●	●	●	●								
9SEMSPSU	●	●		●	●		●	●		●	●		●		
BNURSING	●	●		●	●	●	●	●	●	●	●				
COMPLETE	●	●		●	●		●	●		●	●				
CONSTMGT	●	●		●	●		●	●	●	●	●				
GRADUATE	●	●		●	●										

Keep in mind that the name of the template is not important. The important part is that the template contains the semesters you need. For example, if you need a template that has four fall and spring semesters plus a summer semester between spring 3 and fall 4, it's fine to use the "Constmgt" scheme template even if your major is not Construction Management.

Prior to changing term schemes, make sure all courses and items are located on a semester that will remain. For example, if you are replacing a standard 8 semester plan with a 7 semester plan, all items on semester 8 (such as the exit exam and Apply to Graduate video) would be lost unless they are first moved up within the first 7 semesters prior to the term scheme change.

With this in mind, if you need to change term schemes, click the "Change term scheme" link which is located between the template header block and the main template display. Once opened, select the template you wish to use and click Save. If this term scheme only adds semesters to the existing semesters, it will automatically save. If this term scheme results in the deletion of a semester found on the current term scheme, there will be a warning message.

If you have the need for a scheme template that is not currently available, contact the Associate Registrar-Degree Programs and Advisement Support in the Office of the Registrar to build a new scheme template for you as it must be built on a SEP002 table in Degree Works maintenance by Office of the Registrar staff.

SEP Template Requirements and Notes

The type of requirements available in an SEP template mirror those available to a student building their own SEP plan. Please see the SEP Requirement Types portion of the "How to Use the Student Educational Planner (SEP)" section of this documentation.

You can add additional detailed notes to any course, choice, placeholder, or test score requirement. This is not intended to replace the student's Advising Notes. This should be additional supplemental information related to the requirement to which the note is attached.

To do this, click on the notepad in the bottom right corner of the requirement to which you want to add the note.

ACC 211
Credits: 3.0
Minimum grade: D

This will open a Requirements Notes box. If there is no existing note, it will have a button you can click to add a new note.

Requirement Notes   ✕

There are no notes.

ADD A NEW NOTE

Type the note you wish to add (or paste in text you have copied from something else). Click the "Copy to plan" checkbox. Click the "Save Note" button when finished.

Add a new note   ✕

Add description
This is my example template note.

☑ Copy to plan   ☐ Internal on plan

CANCEL   SAVE NOTE

To edit an existing template note, click on the Notes icon. Click the Ellipse icon (three dots) on the right side of the Requirement Notes box.

Requirement Notes ✕

Created on 04/23/2021 ⋮

By ⬤▬▬▬▬ Copy to plan   Internal on plan
              Yes   No

This is my example template note.

ADD A NEW NOTE

This will open a sub-menu where you will have the option to edit or delete the note. If you wish to edit it, click the "Edit note" link, which will take you to the note box where you can edit and save.

Requirement Notes ✕

Created on 04/23/2021

By ⬤▬▬▬▬ Copy to plan   Inte
              Yes   No

This is my example template note.

View note ⌄

Edit note

Delete note

ADD A NEW NOTE

If you wish to delete the note, click the "Delete note" link. There will be a confirmation message to make sure you wish to permanently delete the note. Click the "Delete Note" button.

Delete note ✕

Are you sure you want to permanently delete this note?

CANCEL   **DELETE NOTE**

Putting a hyperlink into a SEP template is not as simple as it is in an email or Word document. In order to simply this for users, the following is an example of html language that can be copied and pasted in order to create hyperlink and instruction. For this reason, it is recommended to add web addresses as plain text which the student can copy and paste in their web browser.
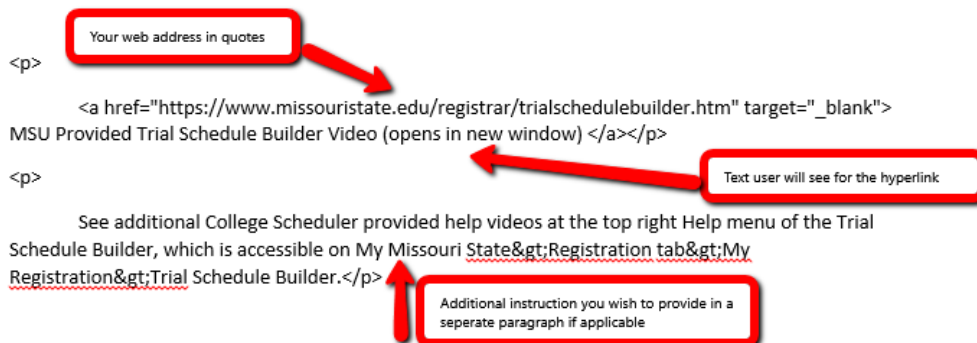
Template Deactivation

If an academic department decides to no longer maintain a SEP template, it is important that it is deactivated. To do this, please contact the Office of the Registrar to arrange to have the template inactivated. You do have access to do this independently, but there are some additional steps behind the scenes that Office of the Registrar staff need to complete related to the naming convention and SEP template maintenance tracking.

Section 6: Additional Degree Works Tools

There are some additional tools that are very important and useful for managing Degree Works responsibilities.

Degree Works Website

There is a Degree Works website (https://www.missouristate.edu/registrar/degreeworks.htm) maintained by the Office of the Registrar to serve as a Degree Works resource to the campus community. Items found on the site include the following:

- Degree Works Core 42 Resources
- Degree Works Future Projects/Enhancements
- Degree Works Training Workshops for Faculty/Staff
- Degree Works User's Guides
- Degree Works FAQ

This can be accessed from the Links section in the Degree Works header row.

Office of the Registrar

Missouri State / Office of the Registrar / Faculty and Staff / Degree Works (Degree Audit and Student Educational Planner)

DEGREE AUDIT

Degree Works Core 42 Resources

Degree Works Future
Projects/Enhancements

Degree Works Training Workshops for
Faculty/Staff

Degree Works User's Guides

Degree Works FAQ

Degree Works (Degree Audit and Student Educational Planner)

The Degree Audit and Student Educational Planner link found on the Student Information Menu in My Missouri State is currently unavailable due to technical issues in the software. Users instead should use the Degree Audit and Student Educational Planner link found in the Advisor Services channel on the Teaching and Advising tab of My Missouri State.

Administrative Audit

Purpose of the Administrative Audit

The Administrative Audit is a tool developed primarily for Office of the Registrar use to support administrative needs that do not need to be tracked from a graduation perspective. Below is a description of the various items found within the Administrative Audit. It is important to remember that it does not related to a particular degree. For example, if there is a course that is not allowed to apply towards a degree that such as restriction would not be enforced in an administrative audit. For example, if course ABC 123 cannot apply towards a BFA degree, a BFA audit would not use the course towards the 120-hour count while an administrative audit would since it is not degree-specific.

120 Credit Count Review

Instead of being programmed to look for 120 credits, this is programmed to look for 1,120 credits so that the section is never met. The purpose of this is to:

- Allow for advisors and OR staff to more easily see in-progress repeat situation.
- Allow for advisors to more easily determine if a current course is needed to reach 120 credits.
- Allow OR staff to determine course applicability for athletic compliance purposes.

40 Hour Upper Division Review

Instead of being programmed to look for 40 upper-division (UD) credits, this is programmed to look for 540 credits so that the section is never met. The purpose of this is to:

- Allow for advisors and OR staff to more easily see in-progress repeat situation.
- Allow for advisors to more easily determine if a current course is needed to reach 40 UD credits.
- Allow OR staff to determine course applicability for athletic compliance purposes.

Core 42 Versus General Education Comparison

The final two sections show the Core 42 and general education blocks so that users can compare the two to make more informed decisions about which set of requirements may be the most academically beneficial to follow. Keep in mind that any degree-level or program-level sharing restrictions would not be enforced on these audits since there is no specific program tied to the administrative audit.

How to Generate an Administrative Audit

- Log into the Degree Works degree audit through My Missouri State. Students will go directly to their degree audit. Advisors will select the student they wish to review. Click on the "What If" link.

- Pick "Not Degree Seeking" in the Degree field and pick the current catalog term in the Catalog year field. In the major box, pick the last selection option (zz-Administrative Audit (Preadm major WP).

- Pick the level of "Undergraduate" for the administrative audit since the requirements it is designed to supply information for are undergraduate in nature.

What-If Analysis   ^

    ☐ Use current curriculum   ☑ In-progress classes   ☑ Preregistered classes

Program

Catalog year *	Degree *	Level *
Spring 2021 ∨	Not Degree Seeking ∨	Undergraduate ∨

Areas of study

Major *	Minor
zz-Administrative Audit (Preadm major… ∨	∨

| **Additional areas of study**   ∨ |

Future classes

| Subject | Number | ADD |

RESET   **PROCESS**