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EAB Academic Planner Quick Start Guide for Advisors

*Access the Academic Planner through the EAB Navigate staff platform through the **AccessUH** portal.*
Access the Navigate training site at https://houston.campus-training.eab.com/admin

To support timely degree completion, Navigate Student now includes a desktop degree planning tool called **Academic Planner** that allows students to collaborate with their advisors to plan their courses term-by-term, and to later schedule and register for their courses.

The Academic Planner lists courses required to complete the degree. Advisors or students can initiate the planning process, adding courses term-by-term to create a full academic plan. Academic Planner is intended as a collaborative planning tool, and is not considered an official degree audit. Students can click on a link in Academic Planner to reach their degree audit in PeopleSoft.

Introduction to the Academic Planner

The Academic Planner functionality is available for advisors through the Navigate staff platform.

- Login to the Navigate staff platform through the Navigate icon in the AccessUH portal (or through the training site link.)
- Access a particular student's Student Profile, and click on the "Academic Plan" tab.
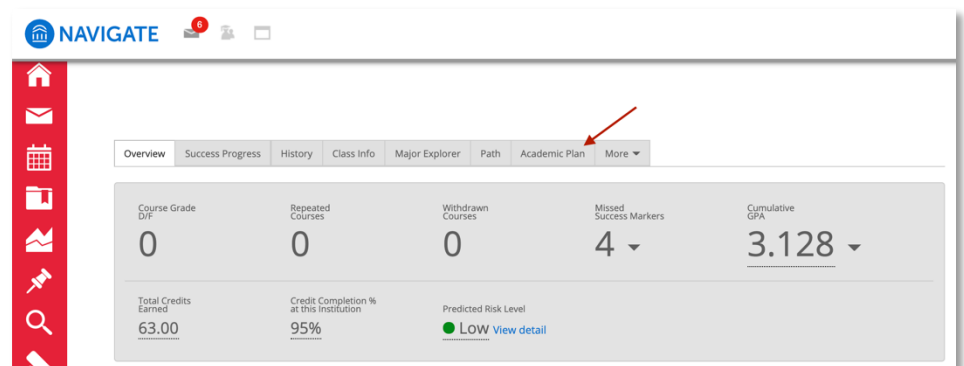
Viewing a Student's Academic Plan

When Academic Planner opens, you will see on the left side the **Degree Planning Template**, which displays the course requirements for the student's declared major (or a Search option, if the student does not have a degree template). On the right side is the student's **My Plan** list of completed courses for past terms, enrolled courses for current terms, and courses that have been planned for future terms. Courses may have been planned by the advisor or by the student.

Updated 10-7-20
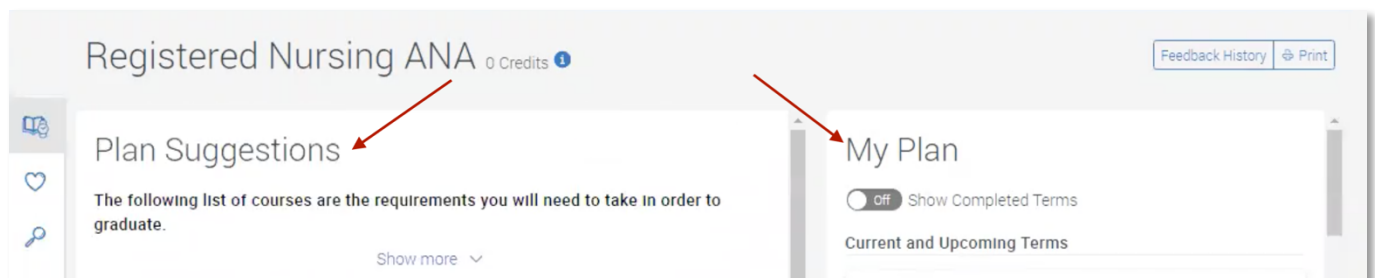
Registered Nursing ANA 0 Credits ⓘ

ANTH101 Intro to Anthropology		Enrolled	View Details ›
CHEM101 Intro to Chemistry		Planned	View Details ›
KIN201 Foundations of Kinesiology		Planned	View Details ›
NUR110 Theory of Nursing	⚑	Planned	View Details ›
▶ HIS111 History of the World Overview: 1600 to To... History Elective		Planned	
ENG101 Composition and Writing I		Planned	View Details ›
BIO201 Evolutionary Biology		Planned	View Details ›
NUR201 Patient Care	⚑	Planned	View Details ›
▶ PSY201 Behavioral Change Behavior Science Elective		Planned	

Degree Planning Template

On the left side, under **Degree Planning Template**, you will see the course requirements for the student's declared major. (Academic planning templates will be buit at UH for catalog year 20-21 and later. Students on a catalog year prior to 20-21 will see a Search option).

The advisor can confirm the program plan name and the catalog year.

Courses listed as single courses indicate a required course a student must take.

Course Groups, denoted with a small triangle, indicate that the student must make a choice from a set number of approved courses or search for a course based on given directions.

Course requirements are tagged in gray as Planned, In Progress, or Completed. Courses that are not yet planned have no tag and the course title is bolded.

### My Plan

On the right side under **My Plan**, you will see:
- Past, current and upcoming terms. (Click **Show Completed Terms** at the top to toggle on the view of completed terms.)
- Courses that have been completed, are enrolled, and are planned, by term.
- The total credits, by term.
- Icons:
  - **Flags**: hover over to see advisor comments pertinent to that course.
  - **Locks**: the student may not move this course to a different term.
  - **Small triangle**: this is a Course Group that requires the student to choose from a set number of approved courses or search for a course based on given direction.
  - **A red triangle exclamation mark**: indicates there are prerequisites required.

≡ Fall 2019

Term Status: Registration Open

Planned ⓘ

🔒 NUR201 Patient Care	⚑	View Details ›
🔒 CHEM101 Intro to Chemistry		View Details ›
≡ ▶ PSY201 Behavioral Change Behavior Science Elective		

Enrolled/ In Progress

|	
≡ NUR101 Intro to Clinical Nursing	View Details ›
≡ NUR155 Women and Infant Health	View Details ›
🔒 EDUC120 Child Development and the L...	View Details ›

If transfer courses have been articulated, transfer courses will be listed under the student's first term and the course requirement will be tagged Completed.

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Providing academic planning guidance

To suggest a change to a student's Planned courses, Click **Add Comments or Suggestions** in the upper right corner. You'll notice the top banner changes color to show you are editing the plan, and the left and right side views change slightly to provide editing actions.
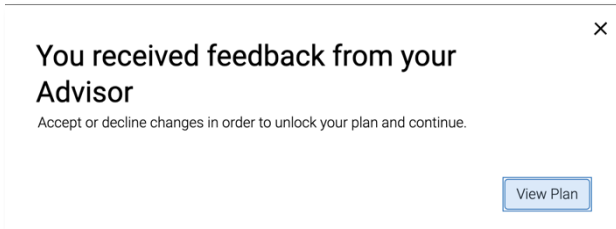
Add Comments or Suggestions
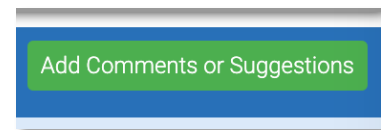
- Courses can be dragged from the template on the left to the appropriate term on the plan on the right, or out of the plan on the right to drop back into the template on the left
- Use the **+ Add a new term** button on the right to add future terms to the student's academic plan. All semesters can be planned in advance.
- Click the "hamburger" icon (three horizontal lines) to the left of a course name under My Plan to see additional actions:

  - o **Move Term**: move this course to a different term on the plan
  - o **Remove from Term**: remove the course from the plan back to the Degree Planning Template
  - o **Course Details**: view course details from the UH Catalog
  - o **Lock Course**: prevent a student from moving that course to a different term.
  - o **Add Flag**: provide a warning or other informational message to student about that course

- When done reviewing and making suggestions, click **Send Suggestions to [Student]**. On the pop-up window, you'll see the changes that you have suggested, and can add a comment. Note that students will not be able to send you a reply through Academic Planner, so you may want to suggest in your comment that they can email you with any feedback or additional questions.

≡ NUR250 Medical Practic
Move to Term   >
Remove from Term
Course Detail
Lock Course
Add Flag
≡ Spring 2021

Send Suggestions to Venus

- Once you send, you'll see a term-by-term summary of planned courses, reflecting any changes you have suggested. The top banner changes to show that you are Pending the student response.

- If you think of another change you'd like to make to the plan, click **Revoke** to revoke your changes and continue editing.
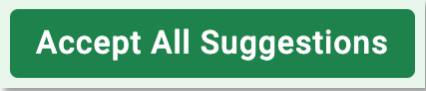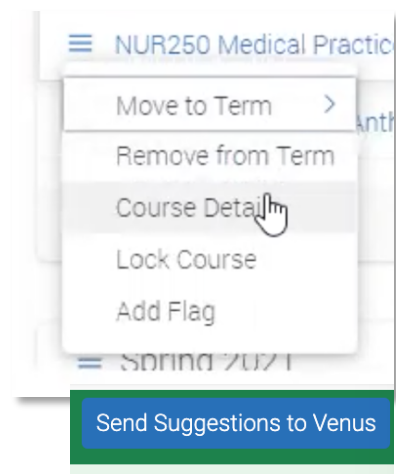
Additional Tips
- It is important that students understand that Academic Planner is a planning tool that will facilitate your collaborative planning process, but it is not considered an official degree audit. Depending on their circumstances (e.g., their catalog year, whether they have transferred courses, whether they changed majors) the courses on their planning templates may need to be adjusted. Students should be encouraged to use any planning guides that your program normally recommends, including the Academic Maps and the degree audit in PeopleSoft.
- If a student does not need to complete a course on their degree template, or if a transfer course is not articulated but the advisor knows that the course satisfies the requirement, the advisor can select "Mark as met" from the hamburger icon in front of the course to mark the course as completed and leave a comment.
- Use the "Search" tab on the left side of the screen to find and add a course that is not listed on a student's degree template.
- Click the "Feedback History" link in the upper left to see a record of recommendations made to this student and whether a student accepted or declined those recommendations.

Student View

You received feedback from your Advisor

Accept or decline changes in order to unlock your plan and continue.

View Plan

- To use Academic Planner, students must log in to the desktop Navigate Student platform; Academic Planner is not available through the Navigate Student app.
- When the student logs in, a notification displays that their advisor has provided feedback.
- The student can view your suggested changes with the date that those changes were made.
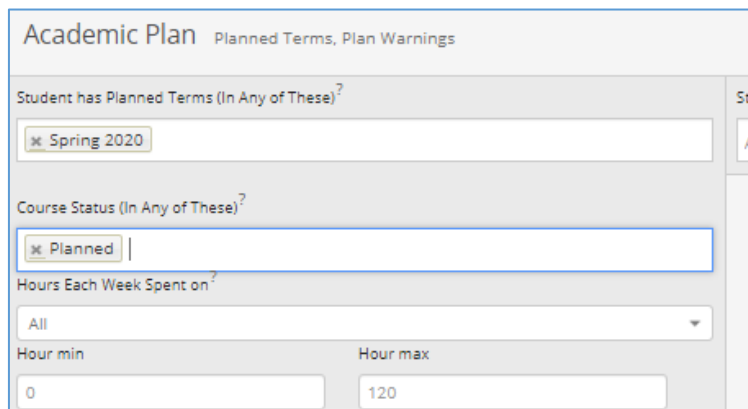
- After reviewing the suggested changes, the student must click **Accept All Suggestions** to confirm, or decline your suggestions. Remind your students about this important step and encourage them to allow notifications from Navigate Student so they do not miss your feedback.

Accept All Suggestions

- If the student has a response to you, they will need to send it to you by email. There is not currently a reply feature in Academic Planner.
- Both the student and the advisor views will update with the approved plan changes.
- The student may continue to plan until all terms are complete.
- Students will be able to plan their course schedule for a term by clicking **View/Edit Schedule**.
- If there are any unresolved prerequisite flags (red triangles), the student can click **I'll Fix Later**. This does not resolve the prerequisite but allows them to continue using the schedule planner tool.
- During Fall 2020, the **Pay Tuition** and **Register** buttons will link the student back to their myUH accounts to complete these processes. These functions are slated to be completed in Academic Planner for Spring 2021 at UH.

Updated 10-7-20

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Searching for Students with Academic Plans

Use Navigate Advanced Search to prompt your students to plan courses and to work with them on their academic plans.

To find students with planned courses, use Advanced Search > the Academic Plan.

- In **Student has Planned Terms**, select a future term.
- Under **Course Status**, select "Planned" to indicate that student has created an academic plan in Navigate. Note: "Scheduled" indicates that student has selected a section time in Navigate, but is not yet registered. Other statuses come from PS.
- Tip: Use the "Student has Not Planned Terms" field to find and nudge students who need a reminder to get started on creating a plan for next term

Suggestions for using Navigate features with Academic Planner:

- Create a saved search each term for your students who have not planned courses for next term
- Find all students UNDERLINE WITHOUT an academic plan for the upcoming term
  - Under "Academic Plan" enter the upcoming term in the "Student has Not Planned Terms (In any of these)"
  - Tip: If you have sent suggestions to these students, and they appear in this list, it means that they have not responded to your feedback
- Find all students WITH an academic plan for an upcoming term
  - Under "Academic Plan" enter the upcoming term in the "Student has Planned Terms (In any of these)"
  - Select "Planned" in the "Course Status" field
  - Tip: If you have sent suggestions to these students, and they appear in this list, it means that they have responded to your feedback
- Find students who did not register for one or more planned courses
  - Under "Academic Plan" enter the current or upcoming term in the "Student has Planned Terms (In any of these)"
  - Select "Planned" in the "Course Status" field
  - Under "Enrollment History" enter the current or upcoming term in the "Enrollment Terms" field (use this to add students who did enroll in some courses)

Find additional resources here: http://www.uh.edu/ussc/navigate/
Need help? Email navigate@uh.edu