Planner Instructions for Graduate Program of Study
(thesis and PhD students)

The Program of Study (POS) is due at mid-term of the first semester for accelerated master's students, and at midterm of the second semester of study for all other students. A POS includes this form and a PLAN that you create in DegreeWorks with your advisor. The course plan can change but the final degree audit at time of graduation must be approved by the advisor and department head. Consult with your advisor before departing from your PLAN.

I.   How to create a Planner audit for your Program of Study

1. Check with your department or program coordinator to see if they have a future semester schedule.
2. Review your program's requirements in DegreeWorks or the online academic catalog to develop a draft plan of courses to take each semester, with input from your advisor.
3. To create the Plan and audit:
   a. Log into SNAP and click on the student tab on the left. Click on the DegreeWorks Dashboard.
   b. Click on the PLANS tab at the very top of the screen. Click on New Plan and then select BLANK PLAN in the pop-up window. Select the next semester from the list as the starting term (you only need to create a plan for future semesters). Click Submit.
   c. The Edit Plan pop-up window will appear. In the description, name the plan **Program of Study**. Select the Active option and then click save. A message will appear that says the plan was created successfully.
4. Enter your planned courses in the next term.
   a. In the first semester of the plan, click the plus sign to enter a course.
   b. Change the option at the top from "Courses" to "Still needed". This will provide you with a list of catalog courses that meet the standard program requirements. It is NOT a list of courses offered in that term. Review the courses available by term in the Banner portal and check with your advisor regarding availability of future courses.
   c. Select the courses you plan to take in that semester, including courses that you have already registered for (Pre-registered courses automatically appear in the degree audit but not in the planner.) The number of research or project credits can be adjusted in the next steps.
      i. If a course you plan to take is NOT on the list, change from the "Still needed" back the "Courses" option and search for the course. An exception will need to be requested in order for these credits to apply to the degree. See step 6 below.
5. Once you have selected the courses for the term, scroll down, if needed, and click Add to Plan. You will be taken back to the main screen of the plan.
6. Review the courses you selected for the term and adjust the number of credits for variable-credit courses (such as research or project credits, independent study or special topics, etc.) if needed.
   a. Click the 3 vertical dots in the top right corner of the course box. Choose "Edit this requirement" from the drop-down menu.
   b. Enter the correct number of credits and choose Save. You do not need to change or enter any other fields.
7. Click ADD TERM and select the next semester from the list. Repeat steps 3 and 4 above for each semester. Continue adding terms and courses until your plan is complete.
8. Ensure that your plan meets program requirements.
   a. On the main screen of the plan, choose the Audit link found immediately above the plan on the left. A new browser tab will open with your audit.
   b. Ensure that all **course** requirements are met.
      i. Review any unmet conditions noted at the top of the audit.
      ii. The "non-course" requirements such as the MS Proposal, Qualifying Exam, and Admission to Candidacy will be filled in later as you complete these requirements. If you have already completed any of these requirements and they are not marked as fulfilled, contact your advisor and the Grad Office.
   c. If any course requirements appear unmet, edit the plan until the audit shows them all met, with the exception of required courses that are being substituted with a different course.
      i. If the requirements you anticipated are different than what appears on the audit:
         1. If you are a thesis MS student, be sure that your major professor has emailed the Grad Office to code this in your degree audit.

2. Check that the catalog year on the audit matches the year of the catalog you are using (which is typically the year you start attending in the degree, unless you have changed to a later catalog year). If you need to change your catalog year, STOP and contact the Graduate Office. You may only request a change to a catalog year later than the one listed in your audit.

   ii. Check the Other Courses section at the bottom of the audit for credits that did not automatically fulfill a requirement:

- If a course is substituting for a required course or a non-standard elective, or is an undergraduate course that needs to be transferred to the graduate transcript, complete the *Adjust Program Requirements* section of the POS form.
- If transferring courses from another institution, fill out a *Transfer Courses from Outside Institution* form (separate form).

9. Once you are confident that your plan meet the program requirements listed on the audit, ask your major professor to review the plan (he/she can see it in DegreeWorks). Make edits, if needed, until the plan meets your major professor's approval.

10. To save the audit as a PDF for inclusion in your program of study, click the Print icon at the top of the audit. (Do NOT use the browser Print function; it will not format the plan correctly.) Choose OPEN PDF, click the Print or Download button, and save the plan to a PDF file.