My Degree User Manual for Advisors

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What is My Degree at UC Davis?

Purpose and Benefits

My Degree at UC Davis is online degree audit software powered by Ellucian Degree Works and maintained by the Office of the University Registrar. My Degree is an easy-to-use set of academic tracking and planning tools designed to help students and advisors work together to plan for academic success and timely graduation.

For students, My Degree:

- Provides real-time academic guidance based on the student's individualized academic history.
- Speeds time to graduation and streamlines the graduation process.
- Provides interactive degree planning and what-if features.
- Facilitates access to multiple academic services.

For advisors, My Degree:

- Supports real-time delivery of academic advice through an intuitive web interface.
- Minimizes errors through consistent degree plans.
- Supports timely degree certification.
- Reduces paperwork by minimizing the need for manual program check sheets.
- Supports and monitors unique program changes.

Contact us at mydegree@ucdavis.edu.

Logging In

My Degree has a production site (active student data and records) and a test site (non-active student data and records used to do testing and practice). Any changes or additions made to records on the production site will be viewable by the student and become part of the student’s live audit. The test site is for training and for advisors to be able to test the functionality of the system. The My Degree link in OASIS directs you to the production site, but you may also log into the system directly.

Production Site: mydegree.ucdavis.edu

Test Site: mydegree-test.ucdavis.edu

Note: My Degree works best when operated on the Firefox browser. Using alternate browsers such as Chrome or Internet Explorer reduces some of the program’s functionality.
Finding Student Records
Using Find Students to identify records based upon user defined criteria

Non-student My Degree users are able to search for groups of students based on multiple criterion associated with student records. This guide helps you understand how to perform a search, what each criterion means, and the values available for each.

Opening a Find Students Window

- In the upper left corner of each My Degree page, there is a gold magnifying glass icon called the Find Record Button.
- Select the Find Record Button. This opens a new Find Students window where you can perform your student records search.

Searching by Name or Student ID

- In the Find Students window, there are options you can select to find the student types you want. Leaving a criterion blank means the search does not use that value.
  - At the top, there are fillable fields for Student ID, First Name, and Last Name used to locate a specific student.
  - Entering any of these values and selecting Search or Enter searches the database for that student.

Selecting a Population of Students

- Users can search for student populations based on many different factors.
  - Degree: type of degree student is seeking.
  - Level: type of student.
  - Catalog Year: student’s currently defined catalog based upon entry.
  - Degree Source: select current or prospective students.
  - Major: student’s currently defined major(s).
  - Minor: student’s currently defined minor(s).
  - College: college(s) a student’s major(s) is in.
Concentration: student’s major concentration(s) as declared in Banner.
Program: special program.
Student Type: student’s university status.
Sport: NCAA sports in which a student participates.
Academic Standing: student’s current standing.
Entry-Level Writing Requirement (ELWR): whether student does or does not need ELWR completed.
Graduation Term: term the student filed to graduate in.
Entry Type: whether a student entered from high school or is a transfer student.
Class Level: Student’s year at the university, based upon units.
International Students: International students only.
Alpha Search (by last name): Searches by the first letter of students’ last names.

Search any combination of the above criteria to identify a student population.

To select a value, select the down arrow on the right side of the bar for the criterion you need. A drop down menu appears and you can select the value you need. The values you select appear in the Chosen Repeatable Search Criteria box and apply to the search.

Users must not select conflicting values for criterion that would lead to zero students for that search. For example, it is possible to search for students who do need ELWR and do not need ELWR by selecting both values for the search. Unintended values can be removed from the search criteria and selecting the Remove button.

Selecting Search will return a student population that matches your criteria in the Student Search area below.

To return to the audit system with a population of students, select (leave check marked) all the desired students, and then select “OK.”
Pulling New Data from Banner

Downloading updated student record information on a single file

My Degree imports new student data every night. The system looks for any changes to a student’s record from the day before, such as newly released grades, newly added or dropped courses, changes or additions of majors, etc. The student’s record in My Degree up-to-date by this download. An advisor may need to update the student’s My Degree information from Banner when changes to a student’s record occur after the nightly download.

1. Navigate to the student’s file you want to update.
2. Select the “Refresh this student’s data” button (two semicircular gold arrows icon).
   a. Answer the prompt “This student’s data was last refreshed *DATE* at *TIME*. Do you want to refresh again now?”
      i. To refresh, select “OK.”
      ii. To cancel the refresh, select “Cancel.”
   b. If you select “OK”, the system downloads the new data. After the download is complete, a message appears; “Last, First Middle was successfully refreshed”
   c. Exit window, note the changed date and time for the last refresh to the left of the button.
Processing an Audit

Running a student’s course history against their requirements

My Degree creates a degree audit by taking a student’s course history, refreshed nightly from Banner, and compares it to the requirements for any majors, minors, colleges, and university requirements that apply to that specific student. The student as well as the academic advisors who work with that student can view the audit. The audit provides an estimate of how much progress the student has made towards completing their degree, as well as showing what courses and requirements they still need to meet in order to graduate.

- Select the Student
  - Navigate to a student’s degree audit through the “My Degree” tab in their OASIS record, or look them up directly in the “Find Students” function of My Degree.
    - For detailed instructions on how to use the “Find Students” function, see the “Finding Student Records” guide.

- The Audit
  - After selecting a student, My Degree displays the Student View of the degree audit. The auditor does not automatically process, so users will decide if they would like to process the audit against the student record in Banner.
    - The date of the most recent audit is located in the same row as the “Find Record Button” and displays as “Last Audit.”

- Processing an Audit
  - If it is possible that a student’s Banner record has changed since the Last Audit, select “Process New” to include the new information.
    - Changes to the Banner record can include, but are not limited to final grades, changes to registration, change of major, change of college, change of catalog, newly declared majors or minors, retroactive actions, etc.
  - To process a new audit, select “Process New”, below and to the left of the “Last Audit Date.”
    - After selecting “Process New,” the page displays, “Please wait while your request is processed…”
    - The “Last Audit” date will change to “Today.”

- Pulling New Banner Data
  - Any changes to the student’s record in Banner download nightly into My Degree.
  - If a change has occurred in the Banner record since the nightly download, users can manually pull the changes into My Degree.
    - At the far end of the same row as the “Find Records Button,” is “Refresh this student’s data.” Selecting “Refresh this student’s data” prompts the system to download any changes to a student’s Banner record.
    - After selecting “Refresh this student’s data,” selecting “Process New” runs a new audit with the newly downloaded student data.
Reading an Audit
Links, Headers, and Worksheets

Links
- Home: Takes you to the My Degree home page.
- OASIS: Takes you back to OASIS.
- User Guide: Provides links to My Degree user manuals.
- Exception Management: Provides an exception report.
- Catalog Year: Allows you to change the students major catalog year.
- Template Management: Allows you to view templates.
- Print: Allows you to print the screen.
- Contact Us: Allows you to send an email to the My Degree group.

Header
- Magnifying Glass Icon: Allows the user to search for a student or student group.
- Student ID: Displays the student’s ID number.
- Name: Displays the student’s full name.
- Degree: Displays the student’s current degree program.
- Major: Displays the student’s current major.
- Level: Displays the student’s level.
- Last Audit: Displays the date on which the last Process New occurred.
- Last Refresh: Displays the last time and date the audit refreshed from Banner.
- Banner Refresh Icon: Pulls any new Banner information in the student’s record into the audit (Students do not have access to this function).
- Notes Icon: Allows you to manage the notes associated with the audit.

Worksheets
  a. Format
     i. Student View: The default view. It provides general information about your completed and remaining degree requirements, grouped into logical sections or blocks.
     ii. Graduation Checklist: A condensed version on the Student View.
     iii. Registration Checklist: Only lists requirements still required.
  b. Save as PDF: Allows you to print or save a pdf version of the audit.
  c. Process New: Allows you to process an audit to pull in updated information.
  d. Include in-progress/preregistered classes: Unchecking these boxes removes in-progress and preregistered classes from the audit.
  e. Class History: This presents the student’s coursework in a transcript-like format broken out by terms.
Student Information Block, Progress Bar, and Disclaimer

Student Information Block:
- Preferred Name: Displays student’s preferred name.
- ID: Student’s ID Number.
- Class Level: Class Level listed in Banner (determined by units completed).
- Quarters in Residence: Quarters student has been at UC Davis.
- UC GPA: Student’s UC GPA as taken from Banner.
- Academic Standing: The qualitative measure of the student’s standing.
- Minimum Progress: The quantitative measure of the student’s standing.
- Level: Student’s level (undergraduate, graduate, etc.).
- Degree: Type of degree student is pursuing (BS, BAS, AB).
- College: college(s) a student’s major(s) is in.
- Major: Student’s currently defined major(s) (if double major, both display).
- Minor: Student’s currently defined minor(s) (will only show when officially declared in Banner).
- Concentration: Not currently used.
- Graduation Status: Students status in terms of Sought, Degree Awarded, Filed to Graduate, etc.
- Transfer Student: If student is a transfer student, “YES” displays.
- NCAA Sport: If student is an NCAA athlete, their sport(s) display.
- International Student: If student is an international student, “YES” displays.
- Entry-Level Writing Req: Displays if/how the student has completed the Entry Level Writing Requirement.
- American History and Inst.: Displays if/how the student completed the American Hist/Inst Requirement.
- Units from Banner: Unit count from Banner. Does not include any My Degree exclusions.
- Admit Term: Student’s admission term to UC Davis.

Degree Progress Bar
The degree progress bar shows an estimate of the student’s progress based on the percentage of completed degree requirements.

Disclaimer:
The disclaimer is at the top of the audit informing the student that the audit is a guide, not a transcript, and does not replace seeing an advisor.
Degree Requirement Blocks and Legend

Blocks: Overview
The blocks in the Student View audit displays all applicable requirements for the student’s degree: University, General Education, School/College, declared area(s)/majors(s), minor(s), etc. In the block header, the Catalog Term displays. This view also displays information on what courses will meet unfulfilled requirements. Select the “See…” link to jump to that area of the Student view audit.

University Requirements Block:
Displays all of the blocks that are required to complete a degree.
- Checks for 180 units: Displays a total of current and needed units.
- Checks for the minimum GPA requirement.
- Senior residency begins checking that 35 of the last 45 units taken are in residency once they reach senior standing.
- Checks for Entry-Level Writing requirement.
- Checks for American History and Institutions requirement.
- Remaining requirements: GEs, Major, Minor, Upper Division, and 180 Unit Check call out the subsequent blocks. Scrolling down the audit or by select the link following the Still Needed portion to reach these blocks. These requirements do not check off in the University Block until all the requirements in their detailed block are complete.
- Reminder to file to graduate when degree requirements are met; a student is not 100% complete until they file to graduate.

Note: If a student has fulfilled their Topical Breadth and Core Literacies requirement via IGETC, the General Education and Foreign Language Requirement displays “Exempted by IGETC” and those blocks do not appear in the audit.
**General Education Blocks:**
Displays all of the general education group requirements for a degree. To avoid unnecessary courses, students should select courses for these blocks in conjunction with additional School/College requirements and in consultation with their advisor. There are three blocks: Topical Breadth, Core Literacy, and English Composition.

**School/College Specific Blocks:**
These block(s) include courses that are specifically required for certain Colleges/Degrees and displays in the body of the audit underneath the General Education Requirement blocks. The example below shows the Foreign Language Requirement for AB Majors.
Major(s) Blocks:
Lists courses required to complete the major(s).

Minor(s) Blocks:
Lists courses required to complete the minor(s).

Upper Division Requirement Block:
Lists courses used to fulfill the college specific upper division course-work requirement.

180-Unit Check:
Once the student reaches senior status, the 180-unit check begins listing the 180 units used to count towards the 180-unit requirement.
Optional Blocks

**Unapplied Courses**: Courses that count towards the total required number of units, but do not fill a specific degree requirement.

**Insufficient**: Courses that include any withdrawn courses, courses that did not meet the grade requirement, and failed courses.

**In-Progress**: Courses with current registration. They group together by registration term.

**Not Counted**: Courses that exceed either the number of allowed repeats or are developmental in nature and do not bear credit towards graduation.

<table>
<thead>
<tr>
<th>Unapplied Classes</th>
<th>Units Applied: 43</th>
<th>Courses Applied: 11</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMT 105</td>
<td>Human Life Cycle</td>
<td>A</td>
</tr>
<tr>
<td>CMM 226</td>
<td>Transfer Communication</td>
<td>A</td>
</tr>
<tr>
<td>SPS 101</td>
<td>Speech Communication - AMERICAN RIVER COLLEGE</td>
<td>A</td>
</tr>
<tr>
<td>HED 100A</td>
<td>Infancy Early Child</td>
<td>RE</td>
</tr>
<tr>
<td>HED 100C</td>
<td>Adolescence And Aging</td>
<td>RE</td>
</tr>
<tr>
<td>HED 100E</td>
<td>Am Women &amp; Family</td>
<td>A</td>
</tr>
<tr>
<td>HED 130</td>
<td>Women in American History - AMERICAN RIVER COLLEGE</td>
<td>B</td>
</tr>
<tr>
<td>HED 151</td>
<td>Transfer Humanities</td>
<td>B</td>
</tr>
<tr>
<td>HED 152</td>
<td>Transfer Humanities</td>
<td>B</td>
</tr>
<tr>
<td>HED 153</td>
<td>Introduction to Humanities - AMERICAN RIVER COLLEGE</td>
<td>A</td>
</tr>
<tr>
<td>PSC 100</td>
<td>Developmental Psychology</td>
<td>A</td>
</tr>
<tr>
<td>PSC 104</td>
<td>Psychology of Emotion</td>
<td>RE</td>
</tr>
<tr>
<td>PSC 105</td>
<td>Special Study</td>
<td>RE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Insufficient</th>
<th>Units Applied: 34</th>
<th>Courses Applied: 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>HED 100A</td>
<td>Infancy Early Child</td>
<td>WC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Progress</th>
<th>Units Applied: 34</th>
<th>Courses Applied: 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>HED 100C</td>
<td>Adolescence And Aging</td>
<td>RE</td>
</tr>
<tr>
<td>PSC 104</td>
<td>Cognitive Psychology</td>
<td>RE</td>
</tr>
<tr>
<td>PSC 105</td>
<td>Psychology of Emotion</td>
<td>RE</td>
</tr>
<tr>
<td>PSC 106</td>
<td>Special Study</td>
<td>RE</td>
</tr>
<tr>
<td>HED 100A</td>
<td>Infancy Early Child</td>
<td>RE</td>
</tr>
<tr>
<td>HED 102</td>
<td>Social &amp; Personal Devel</td>
<td>RE</td>
</tr>
<tr>
<td>PSC 107</td>
<td>Neuropsychology of Learning</td>
<td>RE</td>
</tr>
<tr>
<td>PSC 108</td>
<td>Special Study</td>
<td>RE</td>
</tr>
<tr>
<td>UWP 101</td>
<td>Advanced Composition</td>
<td>RE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Not Counted</th>
<th>Units Applied: 3</th>
<th>Courses Applied: 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSC 100</td>
<td>Special Study</td>
<td>RE</td>
</tr>
</tbody>
</table>

Note: These blocks will not always appear within the audit for every student. They only display if the student has courses that meet the parameters for each individual block. For example, if the student had no courses that qualified as insufficient, the “Insufficient” block would not appear on their audit.
Legend:

- **Complete**: ✓ displays beside all completed requirements within the audit. The row displays the course(s) that fulfilled the requirement along with the grade and completion term of the course.
- **Not Complete**: ☐ displays beside all uncompleted requirements within the audit. The row displays the course(s) that completes the requirement.
- **Complete Except for Classes In-Progress**: ☐ displays for requirements where the student enrolled in the course(s) needed to fulfill the requirement. The row displays the course that will fulfill the requirement once completed, along with the grade “RE,” and the term that they are registered for the course.
- **Nearly Complete – See Advisor**: ☐ displays when requirements are almost complete, but there is a component of the requirement left unmet. For example, if for example if a student were to complete the minimum 12 units in each of the Topical Breadth categories but still had not reached 52 units overall.
- **Transfer Class**: (T) displays beside all requirements that have been satisfied by a course transferred by another institution, along with the grade and completion term.
- **Any Course Number**: @ displays as a My Degree wild card that represents all fields of study when it is a prefix. It represents all course numbers when it follows the field of study. For example, PHY 1@ means any upper division Physics course.
- **Range of Classes**: “:” indicates a range. Any course within that number range fulfills the requirement.
Double (or Multiple) Majors

Double (or Multiple) Degrees on the Same Audit:

- BAS degrees- This degree type is unique to College of Letters and Science. BAS degrees apply to students who are pursuing a BS in one L&S major and an AB in another L&S major. These students will have multiple major blocks posted on the same audit.

  BAS Example:

<table>
<thead>
<tr>
<th>Degree</th>
<th>Bachelor of Arts &amp; Sciences</th>
</tr>
</thead>
<tbody>
<tr>
<td>College</td>
<td>Letters &amp; Science</td>
</tr>
<tr>
<td>Majors</td>
<td>LECN-Economics</td>
</tr>
<tr>
<td></td>
<td>LSTA-Statistics</td>
</tr>
</tbody>
</table>

- Two (or more) AB degrees/two (or more) BS degrees- Students with multiple majors with the same degree type will have multiple major blocks posted on the same audit. If the degrees are in different colleges, the student will also have multiple English Composition and Upper Division Requirement Blocks (one for each college they have a major in) since each college has unique rules for meeting these requirements.

  Same Degree Type in Same College Example:

<table>
<thead>
<tr>
<th>Degree</th>
<th>Bachelor of Arts</th>
</tr>
</thead>
<tbody>
<tr>
<td>College</td>
<td>Letters &amp; Science</td>
</tr>
<tr>
<td>Majors</td>
<td>LENL-English</td>
</tr>
<tr>
<td></td>
<td>LFRE-French</td>
</tr>
</tbody>
</table>

  Same Degree Type in Different College Example:

<table>
<thead>
<tr>
<th>Degree</th>
<th>Bachelor of Science</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colleges</td>
<td>Letters &amp; Science</td>
</tr>
<tr>
<td></td>
<td>Agric &amp; Environmental Sciences</td>
</tr>
<tr>
<td>Majors</td>
<td>LPSC-Psychology</td>
</tr>
<tr>
<td></td>
<td>AHDE-Human Development</td>
</tr>
</tbody>
</table>

Double (or Multiple) Degrees on Separate Audits:

Cross college, double majors who are pursuing different types of degrees (BS + AB) will have two different audits (one for each degree type). If the student has the Cross College Alert but only one college and one major listed in the Student Information Block, the student has a second major in another college with a different degree type. To see the other degree audit, go to the Header of the audit and change the Degree selector to the other degree type and the second audit will load.

Cross College Alert:

Students who have majors in more than one college will have an alert on their record located directly below the Student Information Block.
Sharing Block:
Audits that have double or multiple majors contained in the same audit (BAS, BS + BS, AB + AB) will also have a Sharing Block located under the 180 Unit Check Block. The Sharing Block allows advisors to control the classes shared between the majors and monitor that the shared classes do not exceed amount of units allowed to share amongst the majors. To designate a class as shared, the advisor needs to do an Apply Here exception the Shared Classes Block of the course they want to overlap between the two majors.

Note: Since cross college, double majors who are pursuing different types of degrees (BS + AB) have two different audits, they do not have a Sharing Block. Calculation of the overlapping units for these students is manual or done via reporting.
Notes
Predefined and Custom Notes Added to a Student’s Record

Select pre-defined notes from the dropdown list or create a custom note.

- Enter text in the field to create custom notes.
- Choose predefined notes from the drop down list.
  - Examples of predefined notes include:
    - “Student was advised to register for the courses listed on the Planner.”
    - “Student and advisor discussed student’s career plans.”
    - “Student was advised to apply for graduation by the official deadline.”
    - “Student was advised to consider financial aid consequences before withdrawing from any course.”
    - “Faculty advisor referred the student to the Financial Aid Office.”
    - “Student was advised to…”
  - When selected, a pre-defined note populates the text box. Add additional details if desired.
- Carefully review the text you enter. Notes cannot be edited or deleted once saved to a student’s record.
- Once you have completed your note, select “Save Note.”
- Once saved, view your note in the Notes section at the bottom of the degree evaluation and in the View Notes screen under the Notes tab.

Note: Under FERPA guidelines, ALL advising notes are part of a student’s educational record and students can access them. FERPA guidelines also allow any advisor, with legitimate reason, to view a student’s educational record without permission of the student.
Exceptions
Modifying the degree requirements for a specific student’s degree audit

Exception Overview:
• My Degree gives advisors and others in your department access to modify the degree requirements for a specific student’s degree audit.
• Be aware that this does not change any policy or procedure that is already in place; you still need to get the appropriate approval for changes.
• Exception review conducted by the Dean’s Office will occur to ensure curricular integrity and to note any patterns of making exceptions.

To obtain exception-making privileges:
• Successfully complete FERPA training.
• Attend the “My Degree: Onboarding, Exceptions, and Plans” class offered through the Staff Development Center.
• Receive approval from the Dean’s Office.
Exception Types:

FORCE COMPLETE

Purpose: To waive a requirement.

Application:

1. To waive a course, such as an introductory course. Introductory courses are often restricted to freshmen and sophomores and waived for transfer students.

   Example:

   ![Image of Force Complete]

   Note: A Force Complete uses no units or coursework to complete the requirement. You may need to redirect the units to another requirement (by using a Remove Course and/or Change the Limit exception) in order for the student to accrue the correct number of overall units towards the major.

2. To complete a “Dummy Rule”. A Dummy Rule is a requirement that does not have coursework or a Banner table indicating the status of the requirement. Dummy rules include:
   a. A requirement that says “Advisor Designation”. An Advisor Designation is a box selected to indicate which academic option the student is pursuing within the major

   Example:

   ![Image of Advisor Designation]

   b. A requirement that is contingent upon the student turning in a document such as a thesis.

   Example:

   ![Image of Practicum]

3. To waive a requirement completed via a test not recorded in Banner.

   Example:

   ![Image of Foreign Language Requirement]
SUBSTITUTION

Purpose: To replace the course needed to complete a requirement with a different course while removing the original course as an option for completing the requirement.

Application:

1. To use a transferred course that articulated as a TR1 or TR2 as a replacement for a required course in a requirement with multiple courses needed to complete the requirement. (For example: If a requirement lists “2 Classes in MAT 021A, 021B” or “10 Units in MAT 021A, 021B” and the student has a MAT TR1 that will count as MAT 021A, you would substitute MAT TR1 for MAT 021A).

Example:

```
<table>
<thead>
<tr>
<th>Mathematics</th>
<th>Still Needed:</th>
<th>Choose from 1 of the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculus for Biology &amp; Medicine</td>
<td>3 Classes in MAT 017A and 017B and 017C</td>
<td>or</td>
</tr>
<tr>
<td>Calculus</td>
<td>2 Classes in MAT 021A and 021B</td>
<td></td>
</tr>
</tbody>
</table>
```

Substitution: MATXL32A (UCLA) equivalent to MAT 021B

Substitution: MATXL31A (UCLA) equivalent to MAT 021A

2. To substitute a discontinued course that is a required by the catalog with an alternate course.

Example:

```
<table>
<thead>
<tr>
<th>Critiques of Media</th>
<th>Still Needed:</th>
<th>4 Units in TCS 002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critiques of Media</td>
<td>DES 001</td>
<td>Introduction to Design</td>
</tr>
</tbody>
</table>
```

Exception By: Asab, Karina M On: 12/06/2016
Substitution: TCS 002 discontinued. DES 001 substituted.
**APPLY HERE**

**Purpose:** To apply a specific course to a specific requirement and lock the course into that requirement.

*Note:* The auditor will adjust to make the best fit as the student takes additional course work so this change may happen organically without intervention. Using an Apply Here will lock the course into the selected requirement; the auditor will no longer move a different course into this requirement even if a better fit becomes available. If you find that you use this exception frequently on a specific requirement, please contact the My Degree team to adjust the priority settings linked to the requirement to allow the course to default to the pre-determined requirement.

**Application:**

1. To use a transferred course that articulated as a TR1 or TR2 as a replacement for a course in a requirement where only one class is needed to complete the requirement. (For example: If a requirement lists “1 Class in LIN 001” and the student has an ENL TR1 that will count as LIN 001, apply the ENL TR1 to the requirement).

*Example:*

![Image of application process]

2. To move a completed course to a requirement other than the requirement the auditor chose to place the course in.

*Example:*

![Image of application process]

In this example, the auditor originally selected AST 010G to fulfill Visual Literacy. Move BIS 002C to Visual Literacy freeing AST 010 to fulfill Topical Breadth Science and Engineering.
**ALSO ALLOW**

**Purpose:** To add additional courses as options to complete the requirement and keep the original course listed available as an option as well.

*Note: This exception does not remove the original course(s) listed on the requirement. It also does not require the auditor to use the Also Allowed courses if other courses that fulfill the requirement are available; it only adds additional options for the auditor to use to complete the requirement.*

**Application:**

1. To add an additional course to the list of courses that completes a requirement.

   *Example:*

   ![Image 1](image1.png)

   In this example, PLS 100 will apply towards the Restricted Electives when the student takes the course in the future.

2. To indicate the course(s) the student and advisor have agreed to use as Restricted Electives or Advisor Approved Electives.

   *Example:*

   ![Image 2](image2.png)
REMOVED COURSE AND/OR CHANGE THE LIMIT

**Purpose:** To remove a course from the list of courses that apply towards a requirement or to change the number of classes or units needed for a specific requirement

**Application:**

1. To remove units from one requirement because another requirement has excess units beyond what is needed to satisfy that requirement. For example, if a transfer course used to fulfill a requirement articulates at a higher credit value than the UCD equivalent, the student may use the excess units to count towards an elective requirement. A Change the Limit lowers the units needed for the elective requirement to account for the excess units from the transferred course.

   **OR**

   To add units or courses to a requirement to make up for another requirement being Force Completed.

   **Example:**

   ![Example Image]

2. To remove one of the courses listed as completing the requirement. For example, if one of the courses listed is not currently offered, remove the course as an option.

   **Example:**

   ![Example Image]

*Blue arrows indicate the application of an exception between the before and after screenshots.*
Performing an Exception:

1. To perform an exception, you will need to select the **Exceptions** tab located at the top of the audit.

2. Use the drop down menu to select the specific exception you need.

3. Select the **Load** button to display the **Exceptions** field.

a. Enter a description into the field or the system will automatically generate one. You can add additional, more detailed, notes about the exception by selecting the notes icon next to the Description field.
b. Select the radio button for the requirement you want to Force Complete.

c. Select the Add Exception button.
d. If you choose not to fill in a custom description, the “The description field was left blank” message displays.
   - Select OK if you want the system to generate text for you.
   - Select Cancel to enter your own description.
e. “Your exception has been added to the database successfully” message displays.
f. Select OK.
g. Select Run New Audit to see the exception in the exception tab and the exception displays in the audit.

Exception Tab View:

Audit View:

Note: For some majors with multiple academic options (or concentrations, fields, tracks, etc.), a dummy rule has been built in to allow major advisors to place a student into one of the options. Select the option by doing a Forced Complete on the “Adviser Designation” rule. If you have options and are interested in adding such a designation, let the My Degree team know, and we can do that for you.
5. Substitute.

- Enter a description into the box or the system will automatically generate one. You may also add additional, more detailed notes about the exception by selecting the notes icon next to the description field. Select the radio button for the Substitute requirement you need.
- Enter **Subject** and **Number** of the course you need to replace.
- Enter the **Subject** and **Number** of the substituted course.
- Leave the **With** field blank.
- Select the **Add Exception** button.
- If you choose not to fill in a custom description, “The description field was left blank…” message displays.
- Select **OK**.
- “Your exception has been added to the database successfully” message displays.
- Select **OK**.
- Select **Run New Audit** to see the exception in the exception tab and the exception displays in the audit.
6. **Apply Here.**

<table>
<thead>
<tr>
<th>Exception Types</th>
<th>Apply Here</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Here a specific class</td>
<td></td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Subject</td>
<td>Number</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>With</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
</table>

- a. Enter a description into the box or the system will automatically generate one. You may also add additional, more detailed notes about the exception by selecting the notes icon next to the description box.
- b. Enter **Subject** and **Number** of the course you want to Apply Here to fulfill the requirement.
- c. Leave the **With** field blank.
- d. Select the **Add Exception** button.
- b. If you choose not to fill in a custom description, “The description field was left blank…” message displays.
- c. Select **OK**.
- d. “Your exception has been added to the database successfully” message displays.
- e. Select **OK**.
- f. Select **Run New Audit** to see the exception in the exception tab and the exception displays in the audit.
7. Also Allow.

a. Enter a description into the box or the system will automatically generate one. You may also add additional, more detailed notes about the exception by selecting the notes icon next to the description box.
b. Enter **Subject** and **Number** of the course you want to Also Allow to fulfill the requirement.
c. Leave the **With** field blank.
d. Select the **Add Exception** button.
e. If you choose not to fill in a custom description, “The description field was left blank…” message displays.
f. Select **OK**.
g. “Your exception has been added to the database successfully” message displays.
h. Select **OK**.
i. Select **Run New Audit** to see the exception in the exception tab and the exception will now also appear in the audit.
8. Remove Course and/or Change the Limit.

a. Enter a description into the box or the system will automatically generate one. You may also add additional, more detailed notes about the exception by selecting the notes icon next to the description box.

b. If you want to remove a course from the list of courses needed to complete the requirement, enter in the Remove Subject and Number box. If you want to change the number of units or classes needed to complete the requirement, enter in the Change Limit to box and select Units or Classes from the drop down box. You can also choose to both remove a course and change the limit of a requirement in the same transaction.

c. Select the Add Exception button.

d. If you choose not to fill in a custom description, “The description field was left blank…” message displays.

e. Select OK.

f. “Your exception has been added to the database successfully” message displays.

g. Select OK.

h. Select Run New Audit to see the exception in the exception tab and the exception will now also appear in the audit.
Removing Exceptions

a. Select the **Exceptions** tab.
b. Select the radio button of the exception you want to remove (or scroll to the bottom of the page and select the exception you want to remove from the list of all exceptions on the audit).
c. Select the **Remove Exception** at the top of the page.
d. “Your exception has been added to the database successfully” message displays.
e. Select **OK**.
f. **Run New Audit** to verify the removal of the Exception.
Look Ahead
A tool for planning future coursework and seeing where it will fill into the degree requirements.

1. Enter the course into the “Subject” and “Number” fields and select **Add Course**. This adds the course to the “Courses you are considering field.”
2. Once you have added all the courses, select **Process New** to run the evaluation using the Look Ahead courses. Similar to the what-if, you can also select a different view for the Look Ahead using the drop-down menu at the top.
3. The Look Ahead coursework displays in blue text as in-progress with a grade of PL (planned).

Note: Look Ahead courses factor into the credit totals, but it is important to note that the Look Ahead does not validate against repeat rules. Look Ahead applies repeated coursework in the Look Ahead evaluation and will display more units than the student would actually have after completing the repeat course.
What If
Project a student’s record into alternate majors, minors, catalog years, etc.

Degree audits include the components declared on the student’s record. The What-If feature runs a degree audit based on manually selected components. This is particularly useful for students considering a minor, double major, change of major, or change of catalog year.

1. **Select your view** – The student view is the default. The What-If only runs for the view selected. For a different view, run a new What-If using the same criteria.
2. **What if** – Under the What-If header, select the type of degree and the catalog year.
3. **Choose Your Different Area of Study** – Under the Choose Your Different Area of Study header, select different majors and minors from the drop down menus on the left. The “Chosen Area of Study” field populates based on those selections. You can select multiple majors and minors.
4. **Choose Your Future Classes** – This is essentially Look Ahead functionality combined with the What-If. Students can enter courses they are planning to take in the future and see where those fill in on their What-If evaluation. Displays in blue text in the audit with a grade of PL (Planned).
5. Once satisfied with your What-If scenario, return to the top and select **Process What-If**. A new hypothetical audit generates that applies the student’s record to selected components.
**Plans**

*Using the Plans feature of My Degree to plan a schedule and apply it to an audit*

My Degree contains a student academic planner that allows students and advisors create and edit academic plans, then apply them to the Degree Audit along with the student’s completed coursework. This allows users to see how their academic history and planned coursework satisfy degree requirements.

**Navigating to the Plans tab**

1. Below the Student ID and Name, select the Plans tab.

![MyDegree Plans Tab](image1.png)

**Creating an academic plan**

1. If a student does not have a plan, create a new plan (**Blank Plan**) or load a template (**Select Template**) by selecting the desired option from the pop up box.

![Create Plan](image2.png)

2. Select **Blank Plan**. A prompt appears informing you to wait while the system initiates a plan.
Filling out a Plan

Plan Features

1. **Description**: All plans must have a **Description**, which serves as the Plan title.
2. **Active**: While students may have multiple Plans, only one can be marked **Active** at any given time. Active and locked plans have **Tracking Status** enabled and determines if the student is following their Plan.
3. **Locked**: Locking a Plan stops editing until it is unlocked.
4. **Still Needed**: Based on a student’s currently declared major(s) and minor(s), the Planner will display all of the courses a student needs to complete their currently declared minors. These courses display in the **Still Needed** sidebar. Courses can be drag and dropped into the plan from the sidebar.
5. **Refresh**: The **Still Needed** sidebar does not automatically refresh to account for courses added into the audit. To update the **Still Needed** sidebar, select the **Refresh** button. Individual areas of the Still Needed side bar will disappear from the list will disappear once the course from that area are planned.
6. **Audit**: Users can run an audit that includes the student’s completed coursework, along with coursework they have added to their plan. Select **Audit** to run a new audit with the combined historical and planned coursework.
7. **What-If:** Similar to the **Audit** within **Plans,** a student can run a **What-If** audit that projects them into another major, minor, and/or catalog combination than that which they are currently declared in. Select **What-If** to run a new **What-If** audit with the combined historical and planned coursework projected into a new major, minor, and/or catalog combination.

8. **Save:** A plan can be saved for future reference and editing.

**Adding a Term**

1. Select “+” up at the top of the plans page, just to the left of the **Still Needed** sidebar.
   a. A window will open asking you the term you would like to add to the plan.
   b. Select the appropriate term.

**Adding a Requirement**

2. To add a requirement to a term, select “+” on that term’s header bar. You will be able to add one of 6 types of requirements:
   - **Choice:** Adds a choice between multiple class options without listing each option separately in the Plan.
   - **Course:** Adds a course to the Plan.
   - **GPA:** Sets up a GPA check within the Plan. This check relies upon a user-defined list of classes, a Major GPA, or overall GPAs in either My Degree or Banner.
   - **Non-Course:** Adds a requirement not based upon coursework, such as satisfying the Entry Level Writing Requirement or the American History and Institutions requirement.
   - **Placeholder:** Adds a requirement based upon course attributes, such as General Education Topical Breadth categories.
   - **Test Score:** Adds a requirement for a test score. This feature is currently not functional, as the test scores used on campus are currently not stored in Banner.
3. Removing a Requirement
   a. Select the requirement to make it blue.
   b. Select "-" to remove the requirement.

Saving a Plan

1. Once a Plan is created, select the Save button at the bottom of the Plan. This allows you to use the Audit and What-If features of the audit.
Contact Us
Questions, Comments, Issues?

If you have any questions, comments or encounter any problems with the My Degree at UC Davis system, contact the My Degree team in the Office of the University Registrar at mydegree@ucdavis.edu.