



DegreeWorks Briefing for Advisor

Contents

How to Access

- Access to DegreeWorks
- Navigating the Student List

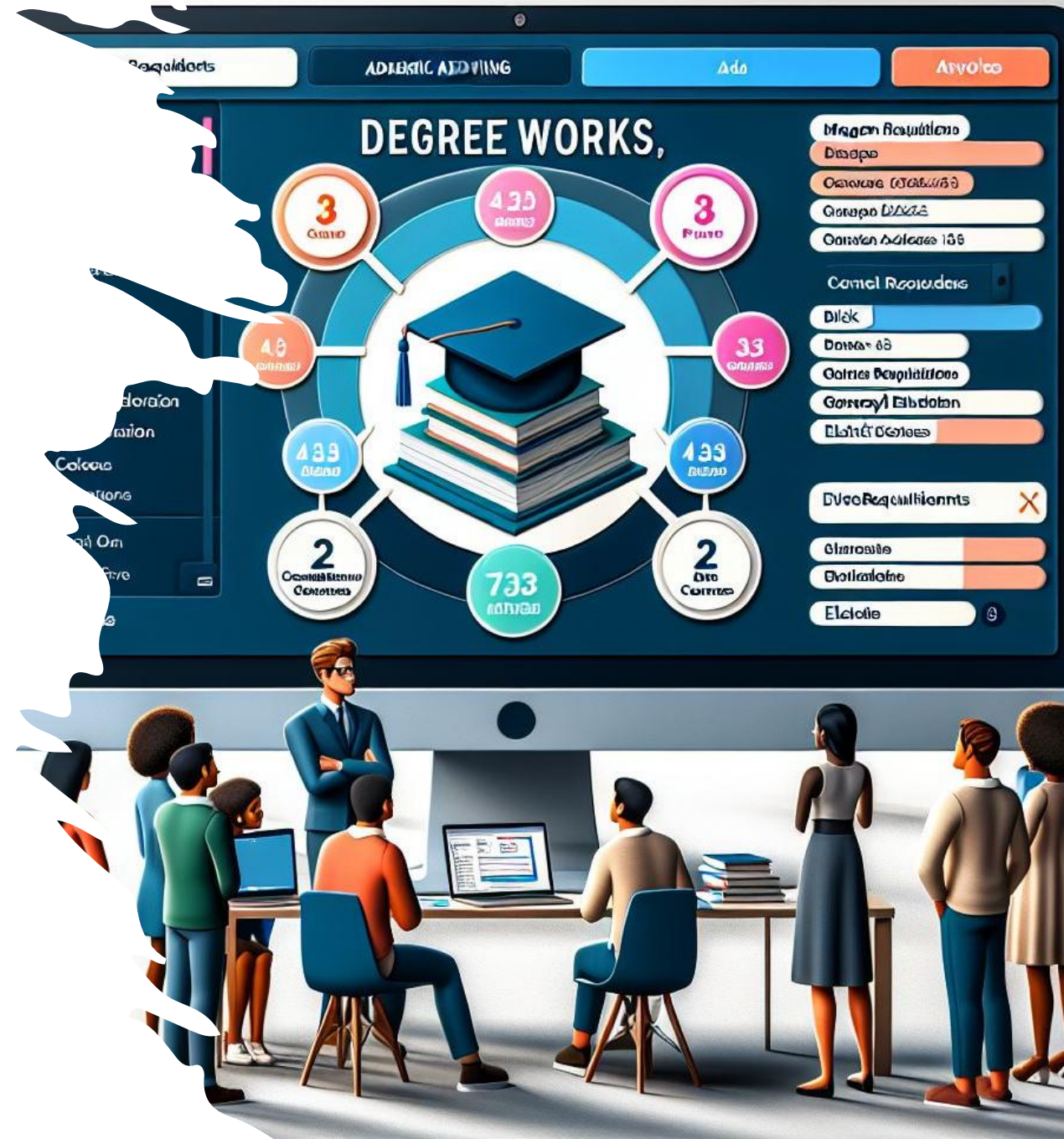
Features of DegreeWorks

- Degree Audit Reports
- Student View
- Registration Checklist
- Class History

Request for Reviewing and Updating Audit Report

Student Educational Planner (SEP)

- Importance of a Study Plan
- Creating and Managing Plans
- Advisor's Role in SEP



Access to DegreeWorks

via The Portal

- Login The Portal site
- Under e-SIS
- Find “DegreeWorks”

Direct URL

- Go to *<https://dw.eduhk.hk/>*

The screenshot shows the 'The Portal' website at <https://myportal.eduhk.hk/myEdUHK/>. The navigation menu includes 'My Info', 'e-SIS', 'Stu Affairs', and 'Tea'. Under 'e-SIS', a dropdown menu is open, showing options like 'Argos Report', 'ARTS (need VPN)', 'Banner Admission', 'Banner Suppl. System', 'DegreeWorks', and 'DegreeWorks Suppl. System'. A blue arrow points from 'DegreeWorks' to a Microsoft sign-in window. The sign-in window has a 'Sign in' section with a text input for 'Email, phone, or Skype', a link for 'Change/Reset Password | Personal Information Collection Statement', and 'Back' and 'Next' buttons. A large blue arrow points from the sign-in window to the DegreeWorks dashboard.

The screenshot shows the DegreeWorks dashboard at dw.eduhk.hk/dwDashboard/. The dashboard has three main sections: 'Advisors List', 'Request Form', and 'Useful Information'. The 'Advisors List' section has a 'Find' button and a search bar. The 'Request Form' section has a 'Student ID' input field, a 'Name' dropdown, and a 'Degree' dropdown. The 'Useful Information' section has a 'Last Audit' input field and a 'Last Re' input field. Below these sections are buttons for 'Degree Audit', 'Planner', 'Plans', 'Notes', 'Petitions', 'Exceptions', and 'G'.

For students, Degree Works:

- Provides real-time advice and counsel
- Speeds time to graduation
- Provides intuitive web access to self-service capabilities
- Streamlines the graduation process
- Allows direct access to multiple related services and advice to help desk services and FAQs

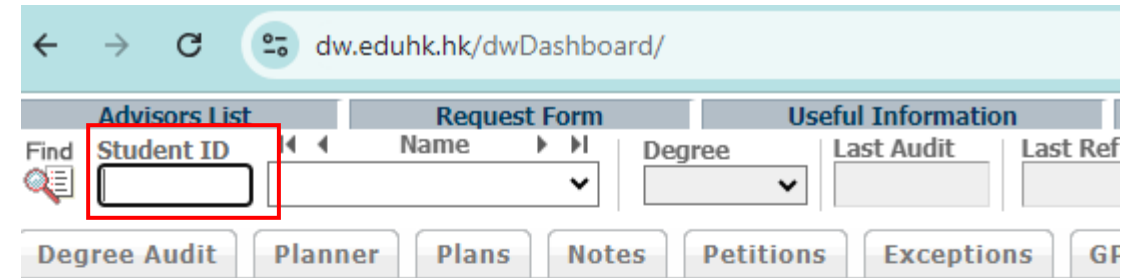
Access to DegreeWorks

Enter Student ID

- Type your student ID in the input field
- Ensure the ID is correct

Proceed

- Press the Enter key to proceed



The screenshot shows a web browser window with the URL dw.eduhk.hk/dwDashboard/. The page has three main tabs: "Advisors List", "Request Form", and "Useful Information". Under the "Advisors List" tab, there is a "Find" section with a "Student ID" input field, which is highlighted with a red box. To the right of the input field are fields for "Name", "Degree", "Last Audit", and "Last Ref". Below these fields are several buttons: "Degree Audit", "Planner", "Plans", "Notes", "Petitions", "Exceptions", and "GF".

For students, Degree Works:

- Provides real-time advice and counsel
- Speeds time to graduation
- Provides intuitive web access to self-service capabilities
- Streamlines the graduation process
- Allows direct access to multiple related services and advice through help desk services, and FAQs

For advisors, Degree Works:

- Supports real-time delivery of academic advice through intuition
- Minimizes errors through consistent degree plans
- Supports more timely degree certification
- Reduces paperwork and manual program check sheets
- Supports and monitors unique program changes

Navigating the Student List (For Administrative Staff)

- Click the "**Find**" button
- Choose the programme and click "**Search**" to retrieve the student list

The screenshot shows the DegreeWorks Find Students interface. A red box highlights the 'Find' button in the top navigation bar. A blue arrow points from the first bullet point of the list to this button. Another blue arrow points from the second bullet point to the 'Degree' dropdown menu in the 'Find Students' modal. The modal displays a list of degree codes, with 'All Degree Codes' selected. Below the list is a 'Student Search' section with input fields for Student ID, First Name, and Last Name, and a 'Search' button. The interface also includes a 'Degree Audit' tab and a 'Request Form' tab.

Advisors List Request Form Useful Information Help Print Log Out

Find Student ID Name Degree Last Audit

Degree Audit

EdUHK Degree Works - DW5DEV - DegreeWorks Find Students - Google Chrome

dw2.eduhk.hk/dwDashboard/dashboard

Find **Find Students** Student ID First Name Last Name

Degree

All Degree Codes

ASSO OF APP SCI (SP CO & MGT)

ASSO OF ARTS (MUSIC)

ASSO OF EDU (LIBERAL STUDIES)

BA (HONS) (CRTV ARTS & CULT)

BA (HONS) (HUM & ORG DEV)

BA (HONS) (LANGUAGE STUDIES)

BA (HONS) (LS EDUCATION)

BA (HONS) ED FR SUSTAINABILITY

BA (HONS) IN TG CHI AS 2ND LG

BA (SE)

BA(CAC) & BED(MU)

BA(CAC) & BED(MU)

BA(CAC) & BED(VA)

BA(CAC) & BED(VA)

BA(HONS) LS & BED(HONS) EL

BED (HONS) (CHINESE LANGUAGE)

BED (HONS) (ECE)

BED (HONS) (ENGLISH LANGUAGE)

BED (HONS) (LANG TEACHING)

Student Search: Enter your criteria and click "Search" to find students.

Student ID Name Degree

OK Cancel Check All Uncheck All

Navigating the Student List (For Administrative Staff)

- Select the students and then click “**OK**”
- You can select all students by clicking the “**Check All**” button, or deselect all by clicking the “**Uncheck All**” button

The screenshot shows the 'Find Students' window in the DegreeWorks system. The window has a header with tabs: 'Advisors List', 'Request Form', 'Useful Information', 'Help', 'Print', and 'Log Out'. Below the header, there are search filters for 'Student ID', 'Name', 'Degree', and 'Last Audit'. The 'Find' button is on the left. The main area contains a 'Find Students' section with input fields for 'Student ID', 'First Name', and 'Last Name' (containing 'chan'). Below these is a 'Degree' dropdown menu set to 'BED (HONS) (SECONDARY)'. There is a 'Chosen Repeatable Search Criteria' section with a 'Remove' button. At the bottom, there are 'Search' and 'Clear' buttons. The results section shows 'Students Found: 40' and a table with columns 'ID', 'Name', and 'Degree'. The table lists 7 students, all with 'BED-S' degrees. Each row has a checkbox in the 'ID' column, all of which are checked. At the bottom of the table are 'OK' and 'Cancel' buttons. To the right of the table are 'Check All' and 'Uncheck All' buttons. Two blue arrows point from the text in the first bullet point to the 'OK' button and the 'Check All' button.

ID	Name	Degree
☒ 52	CHAN,	BED-S
☒ 72	CHAN,	BED-S
☒ 10	CHAN,	BED-S
☒ 99	CHAN,	BED-S
☒ 41	CHAN,	BED-S
☒ 98	CHAN,	BED-S
☒ 75	CHAN,	BED-S

Navigating the Student List (For Advisor)

- Select the students(advisees) from the pre-loaded advisee list

Request Form

Student ID: *****13 | Name: [Redacted] | Degree: BED-CL | Last Audit: Today

[View](#) [Save as PDF](#) [Class History](#)

DW5DEV - DegreeWorks

0830Gt0 as of 04/12/2019 at 17:00

ID	201909	Level	Undergraduate
*****13		Degree	BED (HONS) (CHINESE LANGUAGE)
Advisor	Please refer to the Advisors List.	Mode of Study	5-yr Full-time
Overall GPA		Field of Study 1	Undecided
Latest Semester GPA		Field of Study 2	
Major Subject GPA		Admission Term	2019-09
Latest Year GPA			
Student Status	In Progress		

Bachelor of Education (Honours) (Chinese Language) Credits Required: 156 Credits Applied: 52

Unmet conditions for this set of requirements: 104 Credits needed

- ☐ Min prog GPA requirement has not been audited
- ☐ Min major GPA requirement has not been audited
- ☐ Major Still Needed: See **Major** section
- ☐ Education Studies Still Needed: See **Education Studies** section
- ☒ General Education Foundation Course
- ☐ General Education Breadth Courses Still Needed: See **General Education Breadth Courses** section
- ☐ Experiential Learning Courses Still Needed: See **Experiential Learning Courses** section
- ☐ University ePortfolio Still Needed: See **University ePortfolio** section
- ☐ Final Year Project Still Needed: See **Final Year Project** section
- ☐ Minor / Free Electives Still Needed: See **Minor / Free Electives** section
- ☐ Field Experience Still Needed: See **Field Experience** section
- ☐ Language Enhancement (Credit Bearing) Still Needed: See **Language Enhancement (Credit Bearing)** section
- ☐ Language Enhancement (Non-credit Bearing) Still Needed: See **Language Enhancement (Non-credit Bearing)** section
- ☐ Immersion Programme Still Needed: See **Immersion Programme** section
- ☐ Information Technology Competency in Education Still Needed: See **Information Technology Competency in Education** section

Major Credits Required: 57 Credits Applied: 15

Unmet conditions for this set of requirements: 42 Credits needed

Degree Audit Reports

- Provides detailed information on degree progress
- Helps in tracking completed and pending courses
- Default format is “Student View”
- Show information in blocks

Functional Menu Bar

The screenshot shows the Degree Audit Reports interface. At the top is the Functional Menu Bar with links: Advisors List, Request Form, Useful Information, Help, Print, and Log Out. Below this is a form for Student ID (*****15), Name, Degree (BSSGCS), and Last Audit (Today). The main section is titled 'Degree Audit' and includes tabs for Plans, Format (Student View), and What If. A 'Look Ahead' section is also present. The 'Student View' tab is active, showing a table of student information for AD830H15 as of 09/12/2019 at 16:44. The table includes fields for Catalog Year, ID, Advisor, Overall GPA, Latest Semester GPA, Major Subject GPA, Latest Year GPA, Student Status, Level, Degree, Mode of Study, Field of Study 1, Field of Study 2, and Admission Term. Below the table is a section for 'BSSE(Hon) Greater China Studies' with a table of requirements and credits. The 'Major' section is expanded, showing a list of courses with their status, course number, grade, credits, and semester. Annotations include a red arrow pointing to the 'Student Information' section, a blue arrow pointing to the 'Blocks' section, and a red arrow pointing to the 'Student View' tab.

Student Information

Blocks

DW5DEV - DegreeWorks

Student View AD830H15 as of 09/12/2019 at 16:44

Field	Value	Field	Value
Catalog Year	201609	Level	Undergraduate
ID	*****15	Degree	BSSE (HONS) (GREAT CHINA STUD)
Advisor	Please refer to the Advisors List.	Mode of Study	4-yr Full-time
Overall GPA	2.933	Field of Study 1	Greater China Studies
Latest Semester GPA	2.33	Field of Study 2	
Major Subject GPA	2.887	Admission Term	2016-09
Latest Year GPA	2.33		
Student Status	In Progress		

BSSE(Hon) Greater China Studies Credits Required: 120 Credits Applied: 120

✓	Meet min prog GPA based on the completed courses	
✓	Meet min major GPA based on the completed courses	
[-]	Major	
✓	General Education Foundation Course	
✓	General Education Breadth Courses	
✓	General Education Consolidation Course	
[-]	Minor Studies / Free Electives	Still Needed: See Minor Studies / Free Electives section
✓	Co-Curricular and Service Learning	
✓	Language Enhancement (Credit Bearing)	
[-]	Information Technology Competence Requirement	
[-]	Major	Credits Required: 63 Credits Applied: 63
✓	Method of Inquiry	SSC 1204 C+ 3 Sem 1, 2016
✓	Introduction to Social Theory, Concepts and Issues	SOC 1002 C+ 3 Sem 2, 2016
✓	Education Development: Concepts, Issues and Pe...	EDA 2017 B 3 Sem 2, 2017
✓	Understanding Greater China: History, Politic...	GCS 1001 B 3 Sem 1, 2016
✓	Governance: Concepts, Issues and Perspectives	POS 2001 B- 3 Sem 1, 2017
✓	China's Rise and the Globalized World	POS 2002 B+ 3 Sem 2, 2017
✓	Teaching Social Sciences: Methods and Issues	CUM 3001 B+ 3 Sem 1, 2018

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Advisors List

Request Form

Useful Information

Help

Print

Student ID

Name

Degree

Last Audit

*****15

BSSGCS

Today

Degree Audit

Plans

Degree Audit

Format:

Student View

View

Save as PDF

Class History

What If

Look Ahead

DW5DEV - DegreeWorks

Student View

AD830H15 as of 09/12/2019 at 16:44

Catalog Year	201609	Level	Undergraduate
ID	*****15	Degree	BSSE (HONS) (GREAT CHINA STUD)
Advisor	Please refer to the Advisors List.	Mode of Study	4-yr Full-time
Overall GPA	2.933	Field of Study 1	Greater China Studies
Latest Semester GPA	2.33	Field of Study 2	
Major Subject GPA	2.887	Admission Term	2016-09
Latest Year GPA	2.33		
Student Status	In Progress		

BSSE(Hon) Greater China Studies

Credits Required: 120 Credits Appli

Meet min prog GPA based on the completed courses

Meet min major GPA based on the completed courses

Major

General Education Foundation Course

General Education Breadth Courses

General Education Consolidation Course

Minor Studies / Free Electives

Co-Curricular and Service Learning

Language Enhancement (Credit Bearing)

Information Technology Competence Requirement

Still Needed: See Minor Studies / Free Electives section

Major

Credits Required: 63 Cre

Method of Inquiry	SSC 1204	C+	3
Introduction to Social Theory, Concepts and Issues	SOC 1002	C+	3
Education Development: Concepts, Issues and Pe...	EDA 2017	B	3
Understanding Greater China: History, Politic...	GCS 1001	B	3
Governance: Concepts, Issues and Perspectives	POS 2001	B-	3
China's Rise and the Globalized World	POS 2002	B+	3
Teaching Social Sciences: Methods and Issues	CUM 3001	B+	3

Student View

- Student View Functionality
 - Helps advisors and students identify graduation requirements
 - Shows which requirements are satisfied or still outstanding
- Requirements Display
 - Displayed in blocks for easy understanding
- Common Status
 - Complete 
 - In-Progress 
 - Not complete 

Advisors List		Request Form		Useful Information	
Student ID	Name	Degree	Last Audit		
*****47		CHI-H	Today		

Degree Audit

Plans

Degree Audit

Format:

Student View

View

Save as PDF

Class History

What If

Look Ahead

Legend

☒ Complete

☐ In-Progress

(T) Transfer Class

PL Planned

☐ Not Complete

* Pre-Requisite Required

@ Any Course Number

Information Technology Competency in Education

Unmet conditions for this set of requirements: 2 classes needed

☐ Upper Intermediate IT Competency in Education

Still Needed: 1 Class in ITC 3

☐ IT e-Portfolio Checking

Still Needed: 1 Class in ITC 3

Un-used Courses

BCT 4001 CREDIT TRANSFER (FROM CITYU...)

Satisfied by credit exemption/transfer

HIS 3047 CHINESE HISTORICAL GEOGRAPHY

In-progress

CHI 1559 MODERN CHINESE LANGUAGE

EDA 3026 TEACHERS AND TEACHING IN CO...

EDA 3080 TEACHER EMOTIONS AND PROFES...

FEX 3124 FIELD EXPERIENCE III - BLOC...

GEH 2037 SOLID WASTE MANAGEMENT IN C...

GEK 2017 MINDFULNESS APPROACHES FOR ...

HIS 3029 PEDAGOGY OF CHINESE HISTORY II

HIS 3030 HISTORY OF RELIGION AND SOC...

HIS 3047 CHINESE HISTORICAL GEOGRAPHY

LIT 1001 INTRODUCTION TO LITERATURE

LIT 2007 CLASSICAL CHINESE LITERATUR...

LIT 3014 LITERATURE IN HONG KONG

SED 3001 SCHOOL GUIDANCE AND MANAGIN...

Legend

☒ Complete

☐ Complete except for classes in-progress

☐ Not Complete

* Pre-requisite required

Disclaimer

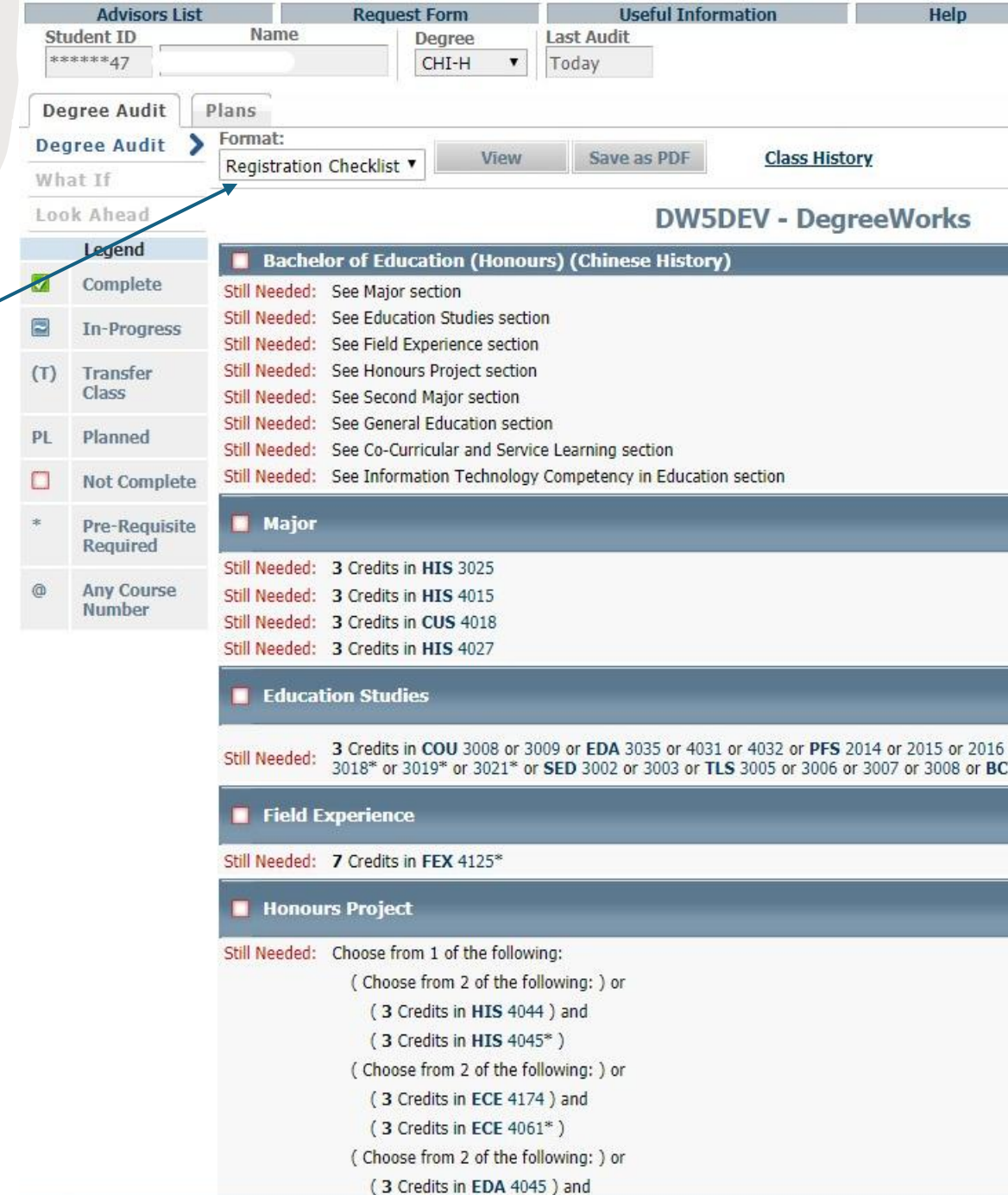
You are encouraged to use this degree audit report as a guide when planning requirements. Your academic advisor or the Registry may be contacted for a your academic transcript and it is not official notification of completion of d... Registry regarding this degree audit report, your official degree/certificate... transcript.

Student View

- Un-used Courses
 - May still count towards graduation requirements
- Save and Download
 - Click “Save as PDF” button
 - Useful for advising meetings

Registration Checklist

- Change the format to “**Registration Checklist**”
 - Choose from the pull down menu and click “**View**” button
- Displays '**Still Needed**' Courses **ONLY**
 - Helps students identify remaining courses for degree completion



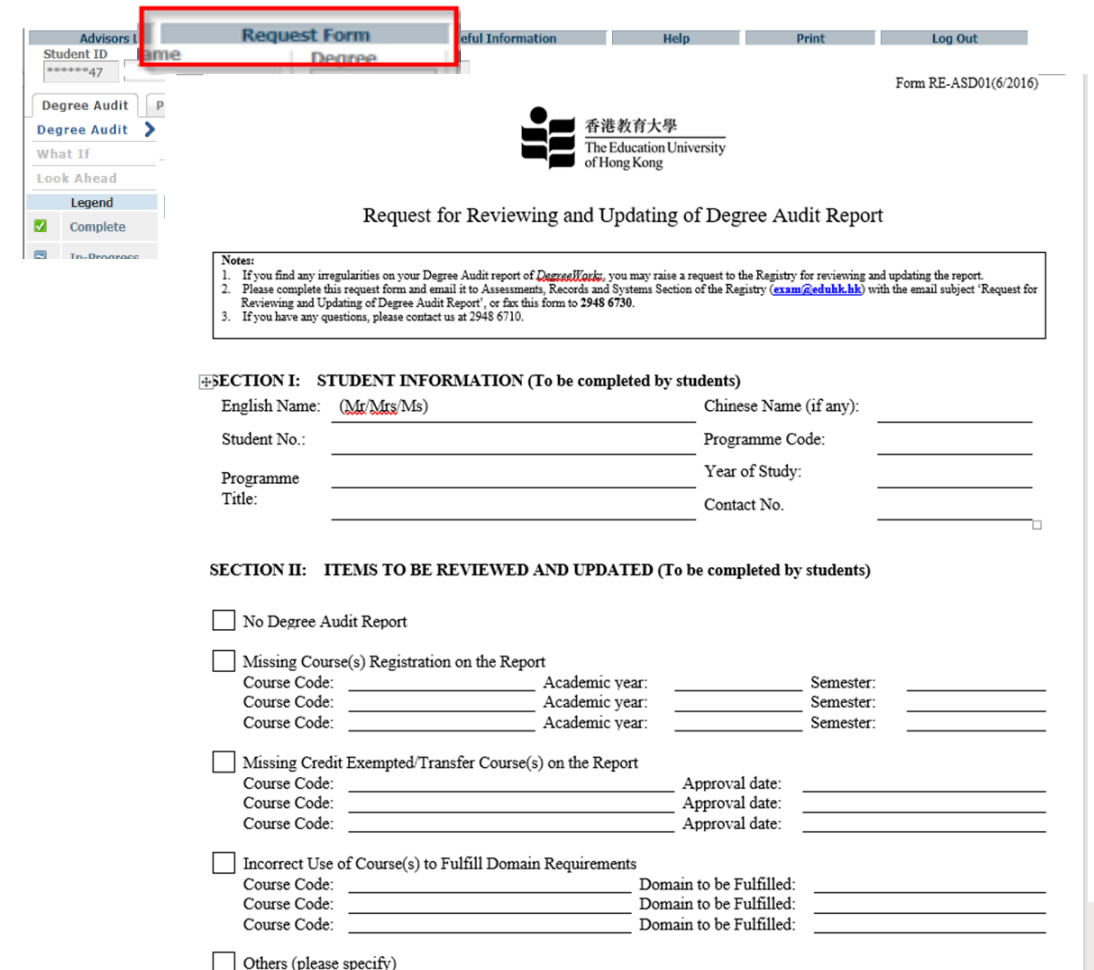
The screenshot shows the DegreeWorks interface for a student. At the top, there are tabs for 'Advisors List', 'Request Form', 'Useful Information', and 'Help'. Below these are input fields for 'Student ID' (*****47), 'Name' (empty), 'Degree' (CHI-H), and 'Last Audit' (Today). A 'Degree Audit' button is visible. The 'Format' dropdown menu is open, showing 'Registration Checklist' selected. The 'View' button is highlighted. The 'Save as PDF' button and a 'Class History' link are also present. The main content area displays the 'Bachelor of Education (Honours) (Chinese History)' degree audit. It lists 'Still Needed' courses for various sections: Major (3 Credits in HIS 3025, 3 Credits in HIS 4015, 3 Credits in CUS 4018, 3 Credits in HIS 4027), Education Studies (3 Credits in COU 3008 or 3009 or EDA 3035 or 4031 or 4032 or PFS 2014 or 2015 or 2016 3018* or 3019* or 3021* or SED 3002 or 3003 or TLS 3005 or 3006 or 3007 or 3008 or BC), Field Experience (7 Credits in FEX 4125*), and Honours Project (Choose from 1 of the following: (Choose from 2 of the following:) or (3 Credits in HIS 4044) and (3 Credits in HIS 4045*) or (Choose from 2 of the following:) or (3 Credits in ECE 4174) and (3 Credits in ECE 4061*) or (Choose from 2 of the following:) or (3 Credits in EDA 4045) and).

- By clicking the “Class History” link to access (Next to “Save as PDF” button)
- Completed Courses
 - List of completed courses by the student
 - Includes grades and credits
- Grouped by Semester
 - Courses are organized by the semester they were taken
- In chronological order
 - From oldest to latest

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Request for Reviewing and Updating Audit Report

- Request Form Submission
 - Fill in the issues found in the Degree Audit Report
 - Use the provided request form
- Reporting Issues
 - Report issues to the Registry
 - Send the report via email
- Email Address for Reporting
 - exam@eduhk.hk



The screenshot shows a web interface for The Education University of Hong Kong. At the top, there is a navigation bar with links: 'Request Form', 'Helpful Information', 'Help', 'Print', and 'Log Out'. The 'Request Form' link is highlighted with a red box. Below the navigation bar, the university's logo and name are displayed. The main heading is 'Request for Reviewing and Updating of Degree Audit Report'. A 'Notes' section contains three instructions: 1. If you find any irregularities on your Degree Audit report of [Degree Audit](#), you may raise a request to the Registry for reviewing and updating the report. 2. Please complete this request form and email it to Assessments, Records and Systems Section of the Registry (exam@eduhk.hk) with the email subject 'Request for Reviewing and Updating of Degree Audit Report', or fax this form to 2948 6730. 3. If you have any questions, please contact us at 2948 6710. Below the notes, there are two main sections: 'SECTION I: STUDENT INFORMATION (To be completed by students)' and 'SECTION II: ITEMS TO BE REVIEWED AND UPDATED (To be completed by students)'. Section I includes fields for English Name, Chinese Name, Student No., Programme Code, Programme Title, Year of Study, and Contact No. Section II includes checkboxes for 'No Degree Audit Report', 'Missing Course(s) Registration on the Report', 'Missing Credit Exempted/Transfer Course(s) on the Report', 'Incorrect Use of Course(s) to Fulfill Domain Requirements', and 'Others (please specify)'. Each checkbox has associated fields for Course Code, Academic year, Semester, and Approval date.

Request Form

Helpful Information

Help

Print

Log Out

Form RE-ASD01(6/2016)

香港教育大學
The Education University
of Hong Kong

Request for Reviewing and Updating of Degree Audit Report

Notes:

1. If you find any irregularities on your Degree Audit report of [Degree Audit](#), you may raise a request to the Registry for reviewing and updating the report.
2. Please complete this request form and email it to Assessments, Records and Systems Section of the Registry (exam@eduhk.hk) with the email subject 'Request for Reviewing and Updating of Degree Audit Report', or fax this form to 2948 6730.
3. If you have any questions, please contact us at 2948 6710.

SECTION I: STUDENT INFORMATION (To be completed by students)

English Name: (Mr/Mrs/Ms) Chinese Name (if any): _____

Student No.: _____ Programme Code: _____

Programme _____ Year of Study: _____

Title: _____ Contact No. _____

SECTION II: ITEMS TO BE REVIEWED AND UPDATED (To be completed by students)

☐ No Degree Audit Report

☐ Missing Course(s) Registration on the Report

Course Code: _____ Academic year: _____ Semester: _____

Course Code: _____ Academic year: _____ Semester: _____

Course Code: _____ Academic year: _____ Semester: _____

☐ Missing Credit Exempted/Transfer Course(s) on the Report

Course Code: _____ Approval date: _____

Course Code: _____ Approval date: _____

Course Code: _____ Approval date: _____

☐ Incorrect Use of Course(s) to Fulfill Domain Requirements

Course Code: _____ Domain to be Fulfilled: _____

Course Code: _____ Domain to be Fulfilled: _____

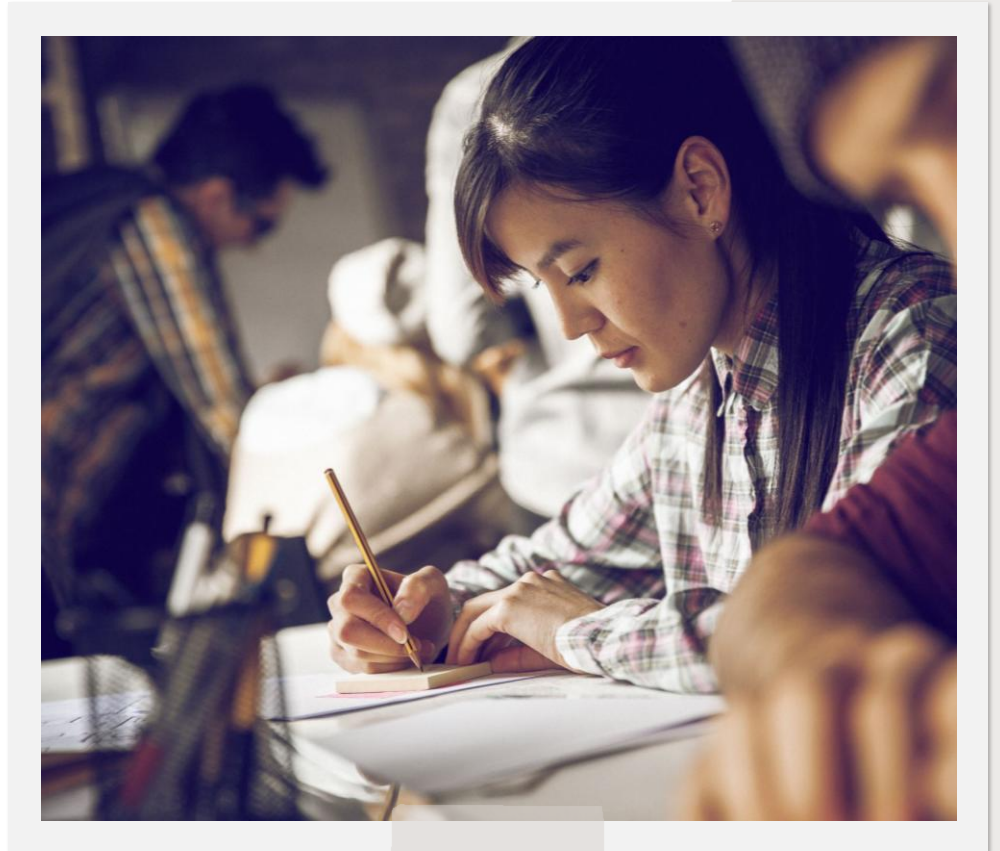
Course Code: _____ Domain to be Fulfilled: _____

☐ Others (please specify)

Student Educational Planner (SEP)

Importance of a Study Plan

- A Learning Tool
 - Helps students understand program requirements
 - Guides students on how to meet graduation requirements
- A Self-Evaluation Tool
 - Allows students to estimate the number of courses per semester
 - Helps judge balance between class load and other obligations
- A Road Map to Academic Success
 - Provides clear direction for completing programs
 - Enhances understanding of academic goals



Student Educational Planner (SEP)

Creating and Managing Plans

- Accessing SEP
 - Click 'Plans' under Student View to access SEP
- Managing Study Plans
 - Students can save their study plan as 'Active' for advising meetings
 - Each student can have numerous plans but **only one Active Plan**
 - Students can make plan to different semesters

The screenshot displays the Student Educational Planner (SEP) interface. At the top, there are tabs for 'Advisors List', 'Request Form', 'Useful Information', 'Help', 'Print', and 'Log Out'. Below these, there are input fields for 'Student ID' (*****13), 'Name', 'Degree' (BED-CL), and 'Last Audit' (Today). A blue arrow points from the 'Plans' tab in the left sidebar to the 'Active' checkbox in the plan details section.

The main section shows the 'Student Planner for' [Student ID] with a 'View' dropdown set to 'Edit'. The plan details include:

- Description: Plan A
- Degree: BED (HONS) (CHINESE LANGUAGE)
- Level: Undergraduate
- Active checkbox (checked)
- Locked checkbox (unchecked)
- Buttons: Reassign, Delete this term

The plan is divided into two semesters, each with a total credit requirement of 6.0:

Semester	Total Credits	Course Requirement	Credits	Notes
Sem 1, 2020	6.0	CHI 1559	3.0	
		CHI 3617	3.0	
Sem 2, 2020	6.0	CHI 3713	3.0	
		CHI 1719	3.0	

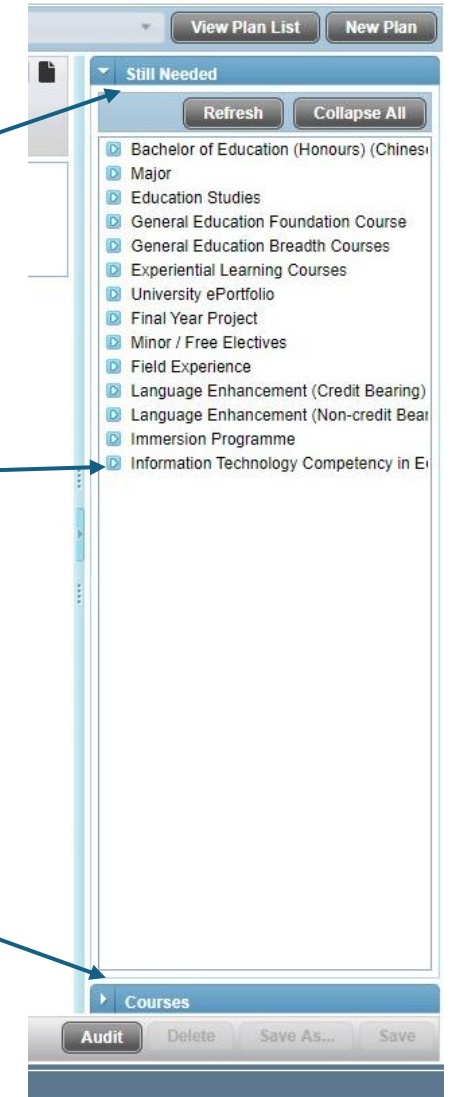
At the bottom, there is a disclaimer: 'You are encouraged to use this degree plan as a guide for tracking your progress toward completion of the above requirements. Your academic advisor or the Registrars Office may be contacted for assistance in interpreting this report. This plan is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrars Office regarding this degree plan, your official degree/certificate completion status, or to obtain a copy of your academic transcript.'

The bottom of the interface shows a 'Last updated by' field, a 'Courses' section with buttons for 'Audit', 'Delete', 'Save As...', and 'Save', and a copyright notice: 'Copyright 1995-2018 Ellucian Company L.P. and its affiliates'.

Student Educational Planner (SEP)

Creating and Managing Plans

- Still Needed View
 - Provides course information from the student audit
- Inventory List
 - Expandable list with drag-and-drop function for course selection
- Courses View
 - Provides a Catalog inventory listing



Student Educational Planner (SEP)

Advisor's Role in SEP

The screenshot displays the SEP interface with a top navigation bar containing 'Advisors List', 'Request Form', 'Useful Information', 'Help', 'Print', and 'Log Out'. Below this, a 'Student ID' field is set to '*****13', and a 'Degree' dropdown is set to 'BED-CL'. The 'Plans' tab is active, showing a 'Student Planner for: [redacted]' with a 'Description' of 'Plan A' and 'Degree: BED (HONS) (CHINESE LANGUAGE)'. A 'Notes' window is open, titled 'Notes attached to: Sem 1, 2020'. It features a rich text editor with a toolbar and a text area containing 'I plan this semester because ..'. The 'Done' button at the bottom right of the notes window is highlighted with a red box. A list of 'Still Needed' courses is visible on the right side of the main interface.

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Plan Level Note/Comments

- Click the note icon button to open the notes
- Enter notes or comments to reply advisees **in English only**
- Click '**Done**' to save

Student Educational Planner (SEP)

Advisor's Role in SEP

The screenshot displays the SEP interface with the following elements:

- Top Navigation Bar:** Advisors List, Request Form, Useful Information, Help, Print, Log Out.
- Student Information:** Student ID (*****13), Name, Degree (BED-CL), Last Audit (Today).
- Degree Audit / Plans:** Student Planner for: [Plan A], View: Edit, View Plan List, New Plan.
- Plan Details:** Description: Plan A, Degree: BED (HONS) (CHINESE LANGUAGE), Level: Undergraduate. Checkboxes for Active and Locked (checked).
- Course Requirements:**
 - Sem 1, 2020 (Total Credits: 6.0):** CHI 1559 (3.0), CHI 3617 (3.0).
 - Sem 2, 2020 (Total Credits: 6.0):** CHI 3713 (3.0), CHI 1719 (3.0).
- Still Needed:** Refresh, Collapse All. List of required courses including Bachelor of Education (Honours) (Chinese), Major, Education Studies, General Education Breadth Courses, Experiential Learning Courses, University Portfolio, Final Year Project, Minor / Free Electives, Field Experience, Language Enhancement (Credit Bearing), Language Enhancement (Non-credit Bear), Immersion Programme, and Information Technology Competency in E.
- Footer:** Last updated by: [Name], Copyright 1995-2018 Ellucian Company L.P. and its affiliates.

Red boxes highlight the 'Locked' checkbox and the 'Save' button. Blue arrows point from the text 'Advisor Actions' to these elements.

Advisor Actions

- Advisor can lock the plan before the advising meeting, or prevent their advisees from making any changes to the plan that had been reviewed/discussed.
- Click and check the “**Locked**” and click “**Save**” button
- Students cannot edit a locked plan
- Students can save a locked plan as a new one and perform editing



Thank you