How to create an 8-semester plan using the your degree audit planning tool

1. Go to the Registrar's main webpage (http://www.rochester.edu/registrar/) and click on the Degree Audit link on the right hand side of the screen.

2. Click on the “here” hyperlink at the end of the first sentence on the Degree Audit webpage.

3. Sign into the U.Achieve Self Service portal with your NetID and password.
4. Once you have logged into the system, scroll down the School tab to find the River Campus option, and click Continue.

5. Click on the Students icon in order to search for a student.

6. You can search for students by their names or ID numbers. After typing in a name or ID number, click Submit.
7. Once in a student’s record, select the Plans tab from the Menu options at the top of the screen in order to enter the U.Direct Roadmap webpage.

8. You will then be prompted to sign in AGAIN with your NetID and password. Because you are using another part of the software to access Plans, it is necessary to validate your login information by signing in again.

9. Any plans that students have created will show on their My Plans tab. The first plan that they create will default as their preferred plan. If you wish to look at a plan, you can click on the link in the Edit Plan column.
10. You will then see the same page that the student sees when creating a plan. The left side represents the requirements for the program they have chosen, while the right side represents the courses they have chosen and the semesters in which they are planning to take them.

11. You can see which plans/programs students have made by clicking on the Chain Link icon on the top right of the screen, under Plan: ____ (in this instruction guide, the Plan: eco plan).
12. You can also see the total number of planned hours in the upper right hand corner of the Plan title. If you wish to see the coursework as a full list, click on the PDF button.
13. You can also create a plan for a student. To do this, click on the Create a New Plan tab.

14. You will now need to choose an intended major program from the list under No Declared Program.
15. Click into the *No Declared Program* box in order to see all available options within the School of Arts and Sciences (AS), as well as within the Hajim School of Engineering (HSEAS).

16. Clicking on an intended major from the dropdown list will move the program into the *Plan* section.
17. You will need to give the program a title (under Plan Name). Please be specific in titling the plan for accuracy and easy identification. You will also need to choose a start term and year. DUE TO CURRENT COMPLICATIONS WITH THE SYSTEM, YOU WILL NEED TO CHOOSE SPRING 2017 AS YOUR FIRST TERM, UNTIL OTHERWISE INSTRUCTED. Click on Add Plan in order to start constructing an academic plan.

18. After clicking on the Add Plan button, the first step will be to add the two missing terms. Choose the “+” sign from the Plan column on the right hand side. Add Fall 2016 and Fall 2017 to your plan.
19. Scroll down to the bottom of the plan, and delete the Fall 2020 and Fall 2021 terms by clicking on the Garbage Can icon on the right hand side of the screen.

20. Now that your plan is set for 4 years, you can now mapping out the course schedule! You can plan in two ways: using the Degree Audit view to see which courses are needed to complete a particular degree, or using the Roadmap view (courses the department has recommended that students take in certain semesters). The Roadmap version is generally easier to use.
21. After deciding on a view, you can see the courses needed to complete your chosen major. You can also expand the text to see more information about any course. Drag a course to the right hand side of the screen in order to incorporate it into your plan.

22. As you add courses to your plan, a green check mark will appear on the left hand side of the screen.
23. Keep in mind that the recommended semesters for major course work are only recommendations. If you would like to move particular courses into a non-recommended semester, that is fine. Coursework that is needed to complete pre-requisite requirements should be taken as early as possible in a student’s academic career. If a student has AP, IB, or other transfer credit, it might already be checked off as completed in his or her plan.

24. Once you have completed major requirements, you may then add any other areas of interest to the plan. You can do so by clicking on the “+” sign, located at the top of the Program side of the plan.

25. Clusters are located within the CLST dropdown list, while Minors are located within the MINORS dropdown list.

26. Once you have added an additional item to your plan, you can then drag the appropriate courses needed into your plan.
27. There is no limit to how many times you can add curriculum requirements. The number of credits listed in your plan will be displayed in the top right hand corner of the plan, and will continuously update as you add or delete items.
28. There are 2 ways to view the information for any major, minor, or cluster. There is the *Semester view* (which is the default screen) or the *Degree Audit view*.
29. When you have finished moving courses into your plan, you can view it in the format of a PDF file by clicking on the PDF button from the Plan tab on the right.

30. You can edit your plans at any point in time by logging back into the Degree Audit system. You can also build multiple plans to handle multiple educational objectives.

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