Communicating about and Documenting in a Student's Degree Plan

Degree Planner includes tools that facilitate documentation and communication between students and advisors:
- *Add/Show/Hide Plan Comments*
- *Approve or Return Degree Plans*

Add/Show/Hide Plan Comments

Within the Year view of the Courses tab, academic advisors can make and view comments about the plan. Academic advisors may use this feature for a variety of reasons, such as to:
- Elaborate on a particular aspect of the plan
- Note changes to curriculum and/or course offerings that will impact the student
- Document that a CAPP substitution, target, or waiver is needed or has been submitted
- Highlight the student's academic and career goals/interests

> IMPORTANT NOTES:
> - **Students can see comments made on their plan in the Courses view, snapshot, and printout.**
> - Comments you enter will remain in the text box until you save or cancel them, even if you navigate to other sections within the student's folder, such as Tracking or Notes. Unsaved comments will be lost if you exit the student's folder before saving your work.
> - Comments can be edited (see below), but they cannot be deleted.

Add Comments
If no comments have been added to the plan yet, the option to **Add Comment** displays in the upper right. If comments have already been added to the plan, **Show Comments** will display in the same area. Click on either of these links to open the Comments section and proceed with documentation.
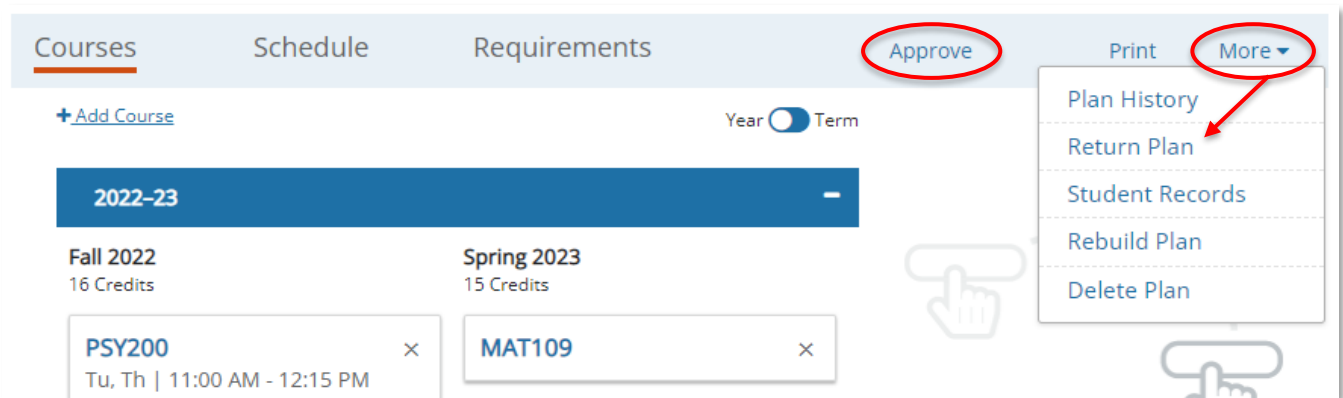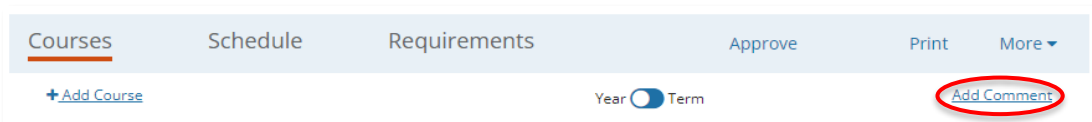

Show, Hide, and Edit Comments
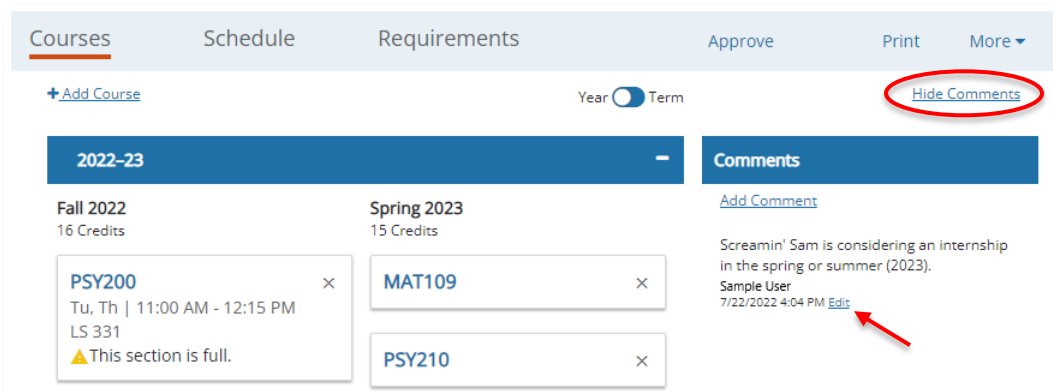
Click **Show Comments** to open the Comments section, view or edit past comments, and add more comments. Click **Hide Comments** to hide the Comments section from view.

Approve or Return Degree Plans

Academic advisors may approve or return (i.e., not approve) Degree Plans at any time. Both options are accessible via the blue bar at the top of a plan and offer the opportunity to provide comments/feedback. When approving a plan, academic advisors also have the option to select an expiration term.
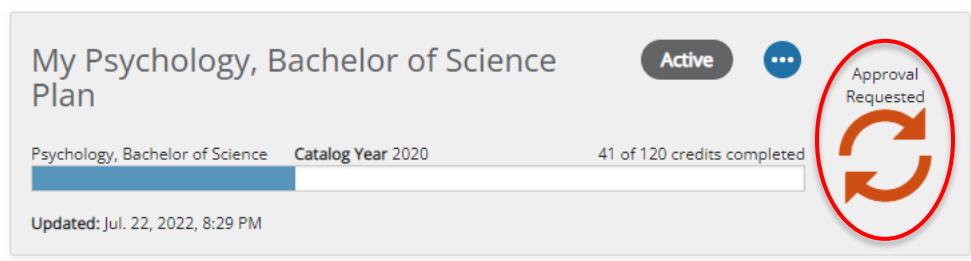

IMPORTANT NOTE:
In the context of course registration advising, plans may be approved on a semester-by-semester basis. However, it is recommended that plans be reviewed and revised (if necessary) for the subsequent 2 years (4 semesters) to align with and support academic departments' planning for the Schedule of Classes.

A student can use the system to request plan feedback from their academic advisor. When they do so, the system employs several indicators: (1) an Approval Requested status icon in the Degree Planner channel of the student's folder, (2) a banner at the top of the selected plan, and (3) an automated email.

Subject: Email From Starfish: Plan Approval Request

Dear [Advisor First Name],

[Student Name] has requested approval on their degree plan with the following comments: [Comments]

After reviewing the student's plan, academic advisors may provide feedback using the **Approve** or **Return** options in the banner at the top of the plan.

Approve a Plan
1. Select **Approve.**
2. Enter feedback in the **Comments** field. (Optional)
3. Choose an **Expiration Term** through which to approve the plan.
4. Select **Send**.

The student will receive the following message:

Subject: Email From Starfish: Plan Approved

Dear [Student First Name],

[Advisor Name] has reviewed your plan and approved it with the following comments: [Comments]

> IMPORTANT NOTE:
> In the context of course registration advising, plans may be approved on a semester-by-semester basis. However, it is recommended that plans be reviewed and revised (if necessary) for the subsequent 2 years (4 semesters) to align with and support academic departments' planning for the Schedule of Classes.

Return a Plan
1. Select **Return** (or **Return Plan** from the More menu).
2. Enter feedback in the **Comments** field.
3. Select **Send**.

The student will receive the following message:

Subject: Email From Starfish: Plan Returned

Dear [Student First Name],

[Advisor Name] has reviewed your plan and returned it to you with the following comments: [Comments]