

Smart Planner: Best Advising Practices

Ref: Sacramento State University

Benefits of Using Smart Planner

For Students

- Students focused, fewer unnecessary courses
- Students graduate more quickly
- Allows for in-depth advising or a different advising focus such as on job readiness

For Faculty/Departments

- Provides an online, flexible roadmap for advising
- Informs us of course demand for specific courses
- Helps with department scheduling

Relative to Cal Maritime

- With the exception of ET Department, only students who started in Fall 16 and beyond have smart plan available (Freshmen – Junior).
- If a student is a PostBac, they will not have a plan
- Critical courses need to be defined for majors
- Preferences have been adjusted to account for semester unit loads greater than 20 units (overload) so that 4 year plans can be made, however, students will still need an overload form properly filled out if they wish to schedule an overload.

Disclaimer

Smart Planner is a tool used to assist students and advisors in arranging courses for degree completion. The order of courses presented does not guarantee a degree will be awarded by the timeline presented. Students should refer to their Academic Requirements Report and meet with their program advisor to ensure degree completion.

Your use of Smart Planner does not constitute a contract with the University. It is a planning tool to help you attain your degree in a timely manner. Be aware that your plan may require changes based on your progress in courses, changes in degree objectives, course availability, and changes in curricula or policies.

Best Practices from Other Faculty Advisors

IDEAS THAT WORK	HOW THEY DO IT
Group Advising	<ul style="list-style-type: none"> • Done in a computer lab • Have students help one another on plans • Offer programs like Cookies & Coaching or Pizza & Planning
Ask students to come ready for advising	<ul style="list-style-type: none"> • Email students to complete SP prior to coming in for an advising session (Flipped Advising) • Advise students based on what they plan to take, making suggestions/changes based on your knowledge of the program
PRINT a plan. Some find it helpful to print the pages they have worked on with the student (save as pdf or print to pdf)	<ul style="list-style-type: none"> • “Print” page is on the top right-hand corner of most pages • Save a plan developed with a student for future reference • In EAB, can save in the notes as an attachment
Use Advisor Notes in Smart Planner. You can add a note for any course listed.	<ul style="list-style-type: none"> • Add a note such as “remember to take this at the same time as EPO 215 in Fall 2019”. Any advisor will be able to see your notes for the student
Use Advising Reports, Advising Reports Planned, and the Smart Planner link	<ul style="list-style-type: none"> • Includes both the Academic Requirements Report and the planned courses to show that the student has planned all required courses • Get rid of the “red boxes”: Lucky Charms
Students care most about enrolling for classes. Inform students they can go from Smart Planner directly into Schedule Planner.	<ul style="list-style-type: none"> • Process is quick and simple and will save students time in generating course schedules • Ensures students do not miss a required course when scheduling their classes

Smart Planner

[Print](#)

[Help](#) [Feedback](#) [Internal View](#) [Schedule Planner](#) [Advising Report](#) [Advising Report Planned](#)

My Areas of Study				
Program	Plan	Catalog Year	Planner Available	Primary Major
Undergraduate	Facilities Engineering Tech (MAJ / BS)	Fall 2015	Yes	Yes

Preferences

Fall 2018	17.00 units	To make the best possible suggestions, Smart Planner needs to know which terms you plan to attend and how many units you plan to take each term. The system initially chooses terms and units based on your progress so far. Additional terms and units are added as a default and may be removed in Edit Preferences.
Spring 2019	17.00 units	

Please edit your Preferences if they are not correct. You may update Preferences at any time.

[EDIT PREFERENCES](#)

Allows student & advisors to add & remove terms to & from the plan and change the preferred number of units per semester. Smart Planner will then account for these and re-optimize the plan.

[ARRANGE MY PLAN](#)
[SMART PLANNER REPORT](#)
[OVERVIEW](#)
[REFRESH SUGGESTIONS](#)
[CLEAR LOCKS](#)

Print	Ability to print Smart Planner in variable formats including PDF.
Schedule Planner	A separate application that allows students to pull courses from their Smart Planner and build their best schedule, even factoring in work/life considerations.
Advising Report	Same as Academic Requirements Report. A list of graduation, GE, and major requirements that a student needs to fulfil to earn a degree.
Advising Report Planned	This is the Academic Requirements Report PLUS courses the student has already selected for any given term -- shows the actual term instead of just the fall/spring semester applicability.
Arrange My Plan	Drag and drop functionality allows advisors and students to move courses into different terms while Smart Planner takes into account prerequisite and co-requisite courses.
Smart Planner Report	See completed courses, courses in progress, planned courses and courses still needed.
Overview	Home screen: provides a visual snapshot of degree progress including completed, in progress, and future planned courses.
Refresh Suggestions	Updates a plan based on the student's current academic situation. Locked courses will remain in their current term.
Clear Locks	Clears all the locks on Courses. NOTE that locking a course tells Smart Planner not to shuffle the course into a different term, however, it still allows an advisor or the student to move the course to another term.

OTHER KEY FEATURES

Add Course	Add Course	Add courses not automatically provided to the plan, such as courses in a minor.
Notes		Important notes about the course from the department (not activated yet).
Critical		Indicates course is critical to program and needs to be taken in the term planned.
Info		Provides course description including semesters typically offered, pre-requisites, and GE Areas satisfied, if any.
Select	Select	Indicates that a course needs to be selected that will fulfill that requirement. If all course selections are made, Smart Planner has been completed.
Lock	<input type="checkbox"/>	Clicking the check box for the course prevents Smart Planner from shuffling it to another term. As student or advisor can still choose to move it.
Advisor Message		Communication from an advisor containing important info about a requirement. Anyone can see these (FERPA rules apply).
Remove		Removes a requirement from the plan for a substitution, waiver, or transfer-credit. This moves the course to the bottom of the page. The course falls off once the course/requirement is completed officially, as identified on the Academic Requirements page. Students can remove courses, but you can move them back in.
Planned vs Target Units	Planned Units 9.00 Target Units 18.00	Target units are set in Edit Preferences. Planned units account for courses planned in that term.

Sac State Tutorial: <https://www.csus.edu/keys/learn/>