



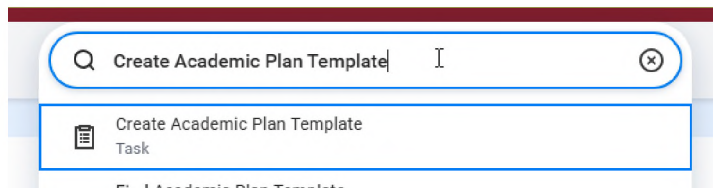
# Creating Academic Plan Templates

## Overview

Academic Plan templates can be used by students to populate their personal academic plan to assist with advising.

### Process: Create Academic Plan Template

1. In the search bar, type “Create Academic Plan Template”.



2. Complete the following fields:
  - Select the **Program of Study** the template is for.
  - Enter an **Academic Plan Template Name**. Use the following naming convention:  
Program of Study - Who will use the plan - Effective Date  
Ex: Accounting - Incoming First Year - 9/1/2024  
Accounting - Sophomore Transfer - 9/1/2024  
Accounting - Junior Transfer - 9/1/2024
  - Enter an **Effective Date**.
  - Click OK.

Note: These templates would align with changes in the academic requirements. If there were no changes during an academic year, then a new template does not need to be created. Once you create a template, you are not able to change the effective date.

3. Complete the following fields:
  - The **Period Number** reflects the terms. Start with '1' which could mean the fall term. Note: Summer does not count as a term.  
Ex: 1 = Fall (first year), 2 = Winter, 3 = Spring, 4 = Fall (second year)
  - Select the **Academic Requirement**. This will pull from the requirements in the academic progress report for that program.
  - Select the **Course** if there is a specific one the student should take for that requirement. For Core requirements, you can leave this field blank if there is not a specific course.

Click OK once done.



# Creating Academic Plan Templates

**Create Academic Plan Template**

Program of Study: English Major

Academic Plan Template Name: English - Incoming First Year - 9/1/2026

Effective Date: 09/01/2026

*Period Number	Academic Requirement	Course
1	Core: CAS: C&I 1	
	Core: CAS: CTW 1	

## Maintain Academic Plan Templates for Program of Study

Program of Study \* English Major

Cancel OK

### Process: Maintain Academic Plan Templates for Program of Study

- In the search bar, type “Maintain Academic Plan Templates for Program of Study”.

Search: Maintain Academic Plan Templates for Program of Study

Maintain Academic Plan Templates for Program of Study Task

- Enter in a “Program of Study”.

- This task allows you to add the Academic Plan Templates that have been created to an Effective Date. For example (see screenshot below), students who have an academic progress report requirement effective date of 9/1/2026 may have multiple templates but we have selected the “English - Incoming First Year - 9/1/2026” template to be the default. This means this will be auto-selected when a student starts their Academic Plan. However, students will be able to choose another plan template if there are multiple available for that effective date. Click OK.

Note: It is required to select one plan as the default.



# Creating Academic Plan Templates

**Maintain Academic Plan Templates for Program of Study**

Program of Study English Major

1 Item

	*Effective Date	Default Template	*Academic Plan Template
	09/01/2026		
		<input checked="" type="checkbox"/>	English - Incoming First Year - 9/1/2026

**Find Academic Plan Templates**

Program of Study English Major

Cancel OK

## Process: Find Academic Plan Template

- To find templates that have been created, in the search bar, type “Find Academic Plan Templates”.

Find academic plan templates

Find Academic Plan Templates Report

- Enter in the “Program of Study”. Click OK.

- All templates created for this program will appear.

**Find Academic Plan Templates**

Program of Study English Major

1 Item

Program of Study	Academic Plan Template	Number of Versions	In Use
English Major	English - Incoming First Year - 9/1/2026	1	Yes