

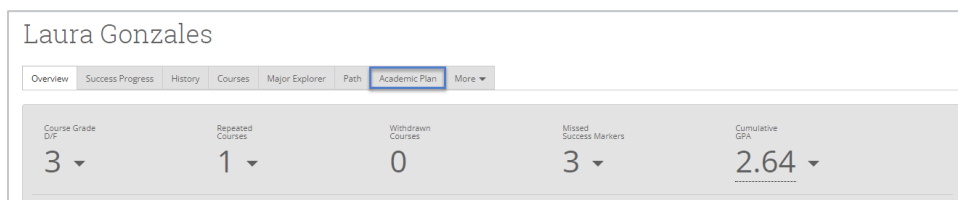
Getting Started: Advisor Guide to Academic Planning

An integrated component of Navigate, Navigate Student includes a mobile application that helps students navigate key decisions and a desktop-based planning tool, Academic Planning, to help them plan and schedule their courses, supporting timely degree completion. Advisors can use Shared Workspace to build plans for students and collaborate on planning their path to degree.

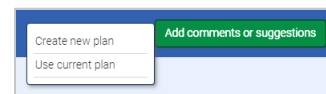
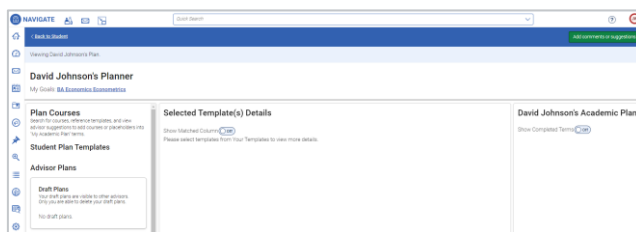
To get started, log in to Navigate with your UWyo credentials: <https://uwyo.miq-campus.eab.com/>

Use the Academic Plan tab to create Academic Plans for students

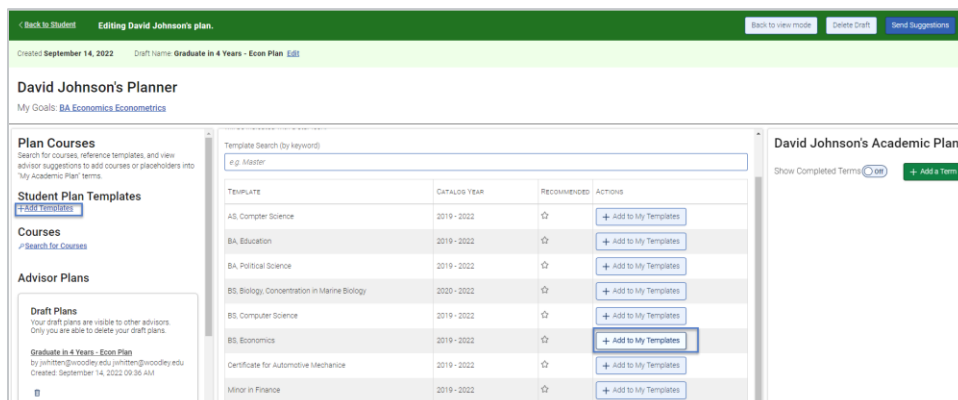
1. Use the Quick Search or Advanced Search to find a student profile. Select the **Academic Plan** tab.



2. Shared Workspace opens in View Mode. Click the **Add Comments or Suggestions** button in the upper right-hand corner to create a plan for the student. Select **Create New Plan** if the student has no planned courses. Select **Use Current Plan** if you would like to create your plan based off the student's planning activity.

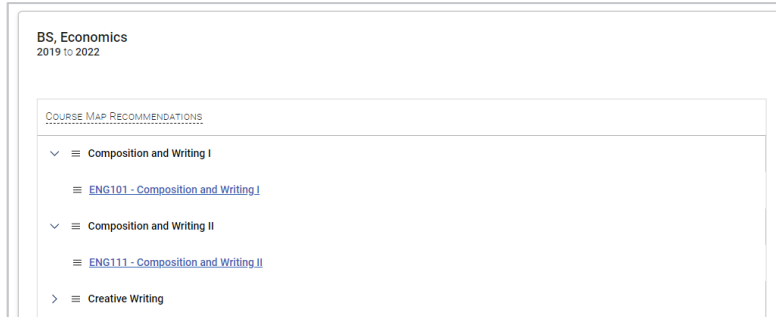


3. Give the plan a name that is descriptive for students, including terms and goals, if applicable.
4. Click **+ Add Templates** to browse available templates. Templates with a **Recommended** star match the student's goals and catalog year. Select **Add to My Templates** and click **Back to Planning**.

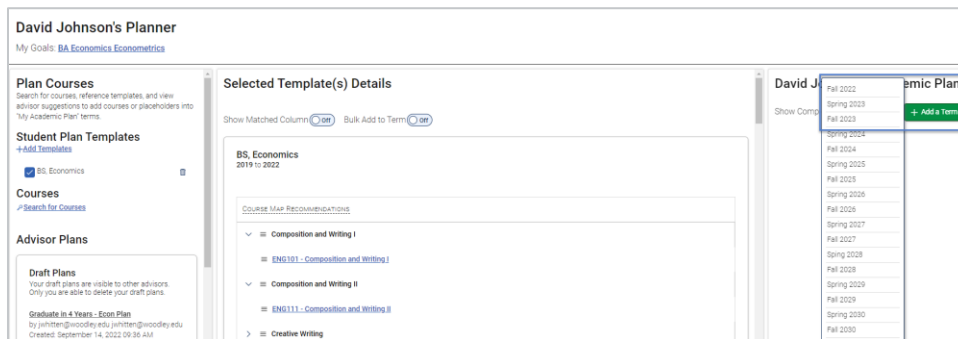


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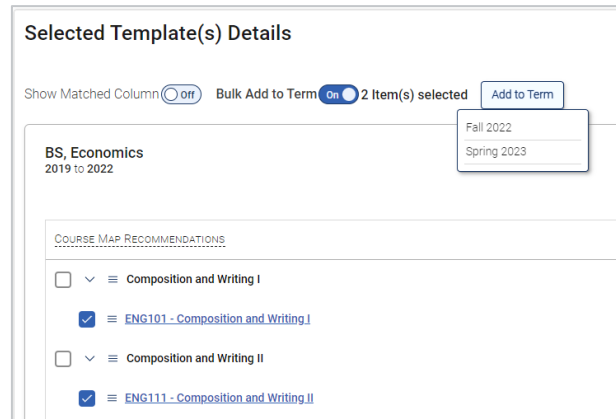
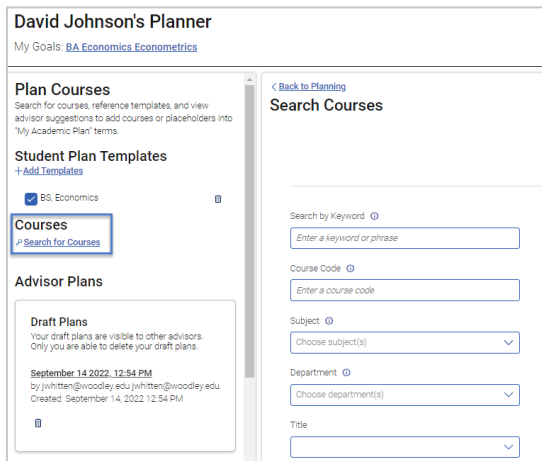
- Click the > icon in front of a Course Recommendation to expand the course(s) included in the recommendation.



- In the right panel, click **+ Add a Term** to add one or more upcoming terms into which you'll place courses.

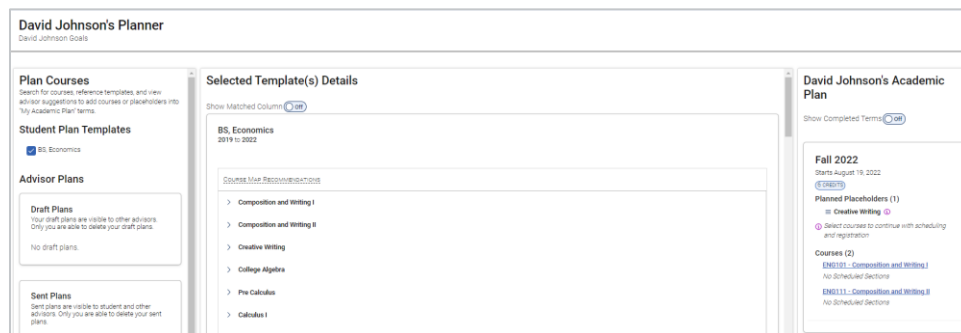


- Add courses to terms by selecting the box in front of a course recommendation and clicking **Add to [Term]**. Use the **Search for Courses** link on the left side of the screen to find and add a course that is not listed on a student's degree template. You can also toggle on the **Bulk Add to Term** switch, select multiple courses, and add them all to the same term.



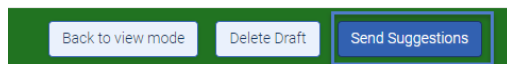
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8. You may add both courses and **Placeholders** to a term. Placeholders represent a Course Recommendation where the specific course has not yet been selected. You may add comments that show to students on individual courses, placeholders, and the term overall.

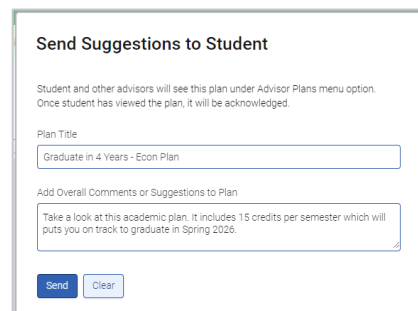


The screenshot shows the 'David Johnson's Planner' interface. On the left, there are sections for 'Plan Courses', 'Student Plan Templates' (with 'Econ' selected), and 'Advisor Plans' (with 'Draft Plans' and 'Sent Plans' sub-sections). The main area is titled 'Selected Template(s) Details' and shows a list of courses under the 'BS, Economics 2019 to 2022' template, including 'Composition and Writing I', 'Creative Writing', 'College Algebra', 'Pre Calculus', and 'Calculus I'. On the right, the 'David Johnson's Academic Plan' is displayed for 'Fall 2022', showing 'Planned Placeholders (1)' and 'Courses (2)'.

9. When you are finished adding all terms and courses, you can send the plan to the student. Click **Send Suggestions** in the top banner, add a message you'd like to share with the student, and click **Send**.

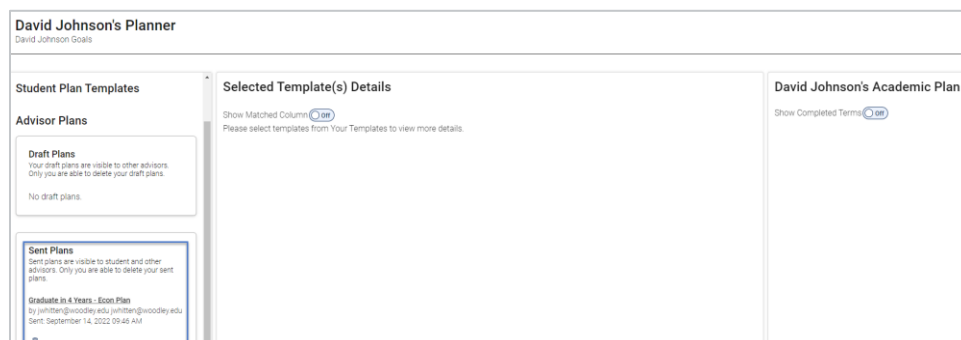


A row of three buttons: 'Back to view mode', 'Delete Draft', and 'Send Suggestions' (highlighted with a blue border).



The 'Send Suggestions to Student' form includes a title 'Send Suggestions to Student', a description 'Student and other advisors will see this plan under Advisor Plans menu option. Once student has viewed the plan, it will be acknowledged.', a 'Plan Title' field with the value 'Graduate in 4 Years - Econ Plan', an 'Add Overall Comments or Suggestions to Plan' field with the text 'Take a look at this academic plan. It includes 15 credits per semester which will put you on track to graduate in Spring 2026.', and 'Send' and 'Clear' buttons.

10. You can view **Draft Plans** and **Sent Plans** from all staff members. You may delete only plans you have created; students may not delete plans.



This screenshot shows the 'David Johnson's Planner' interface with the 'Advisor Plans' section expanded. It displays 'Draft Plans' (with 'No draft plans.' message) and 'Sent Plans' (with a list of sent plans, including 'Graduate in 4 Years - Econ Plan' sent on September 14, 2022). The 'Selected Template(s) Details' section is empty, and the 'David Johnson's Academic Plan' is visible on the right.