

# Smart Planner: Best Advising Practices

## 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

## Best Practices from Other Faculty Advisors

IDEAS THAT WORK	HOW THEY DO IT
<p><b>Identify student groups</b></p> <ul style="list-style-type: none"> <li>• Those who have not used it</li> <li>• Those who have not updated it in a year</li> <li>• Fully completed (maybe check them without having them come in).</li> <li>• (See accessing reports in section below)</li> </ul>	<ul style="list-style-type: none"> <li>• Use the Cognos Report Smart Planner Communications Query report and send targeted email</li> </ul>
<p><b>Use Cognos Reports</b></p>	<ul style="list-style-type: none"> <li>• Course Interest Report. Run this report to see how many students have added your course in a particular semester. You can drill down to that group of students and email them to confirm their plan to take that course. This lets also tells the students that we are truly looking at their plans.</li> </ul>
<p><b>Group Advising</b></p>	<ul style="list-style-type: none"> <li>• Done in a computer lab</li> <li>• Have students help one another on plans</li> <li>• Offer programs like Cookies &amp; Coaching or Pizza and Planning</li> </ul>
<p><b>Ask students to come ready for advising</b></p>	<ul style="list-style-type: none"> <li>• Email students to complete Smart Planner prior to coming in for an advising session (“Flipped” advising)</li> <li>• Advise students based on what they plan to take, making suggestions/changes based on your knowledge of program.</li> </ul>

<p><b>PRINT a plan.</b> Some find it helpful to print the pages they have worked on with student (save as a PDF)</p>	<ul style="list-style-type: none"> <li>• “Print” page is on the top right-hand corner of most pages</li> <li>• Save a plan developed with a student for future reference</li> <li>• If using EAB, can save in the notes as an attachment</li> </ul>
<p>Send them to a <b>resource in your college.</b></p>	<p>Some colleges have Faculty Fellows &amp; Student Centers. Encourage students to continue using Smart Planner and complete their plans and send them to these resources.</p>
<p>Use Notes in Smart Planner. You can add a note for any course listed.</p>	<p>Add a note for the student such as “take this course in fall 2018.” Any advisor will be able to see your notes for the student.</p>
<p>Use “<b>Advising Reports Planned</b>” link OR the “<b>Smart Planner Report</b>” link</p>	<ul style="list-style-type: none"> <li>• Includes both the Academic Requirements Report and the planned courses to show that the student has planned all required courses.</li> <li>• Get rid of the “Red” Boxes: Lucky Charms</li> </ul>
<p>Students care most about enrolling for classes. Inform students they can go from Smart Planner into Sac State Scheduler</p>	<ul style="list-style-type: none"> <li>• In the Sac State Scheduler system, they can choose from the courses they have planned in Smart Planner. They can pull from the next two semester they have planned since it looks at the published schedule of classes.</li> </ul>

# SMART PLANNER REFERENCE SHEET

[Help](#)
[Feedback](#)
[Internal View](#)
[Sac State Scheduler](#)
[Academic Requirements](#)
[Advising Report Planned](#)

My Areas of Study				
Program	Plan	Catalog Year	Planner Available	Primary Major
Undergraduate Degree	Biology (Pre-Major) (MAJ / BA)	Fall 2017	Yes	Yes

Preferences		
Fall 2018	15.00 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.  Please edit your Preferences if they are not correct. You may update Preferences at any time.
Spring 2019	15.00 units	
Fall 2019	16.00 units	
Spring 2020	16.00 units	
Fall 2020	16.00 units	

EDIT PREFERENCES

Allows students/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
WHAT-IF REPORT
OVERVIEW
REFRESH SUGGESTIONS
CLEAR LOCKS

Below you will find course work based on the remaining requirements for your major(s) and minor(s).

Please note that not all plans may be available at this time.

[What is a Lock?](#)

SAC STATE SCHEDULER	A separate application that allows students to pull courses from their Smart Planner and build their best schedule, even factoring in work/life considerations.
ACADEMIC REQUIREMENTS	A list of graduation, GE, and major requirements that a student needs to fulfill to earn a degree.
ADVISING REPORT PLANNED	This is the Academic Requirements information PLUS courses the student has already selected in Smart Planner.
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.
WHAT-IF REPORT	For students who want to change majors or add a major/minor use this page to create a what-if scenario to see the new plan's academic requirements and how work completed applies to the new program of study. View additional classes and terms a student will need if they change majors or add a minor. To see how many semesters altogether, choose "What-If Study Plan" link.
OVERVIEW	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 places 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	 <a href="#">Add Course</a>	Add courses not automatically provided to the plan, such as Upper Division GE, units in residence, etc.
NOTES		Important notes about the course from the department
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	<a href="#">Select</a>	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		Clicking the check box for the course prevents Smart Planner from shuffling it to another term. A student or advisor can still choose to move it.
ADVISOR MESSAGE		Communication from an advisor containing important info about a requirement. Anyone can see notes.
REMOVE		Removes a requirement from the plan for a substitution, wavier, 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 Academic Requirements page. Students can remove courses, but you can move them back in.
PLANNED VS TARGET UNITS	<b>Planned Units 14.00</b> <b>Target Units 16.00</b>	Target Units are set in Edit Preferences. Planned Units accounts for courses planned in that term.

## Resources & Tools for Faculty

- Links for Students
  - Overview Help Page for Students: <http://csus.edu/smartplanner/students.html>
  - Interactive Tutorial: <http://csus.edu/keys/resources-training.html>
  - Flipped Learning: <https://csus.service-now.com/service/training?area=TRO0001025&lesson=TRO0001067>
  - Key Features Link: <http://csus.edu/smartplanner/features.html>
- Links for Faculty (Above options are also useful for faculty)
  - Overview Help Page for Faculty: <http://www.csus.edu/smartplanner/faculty.html>
- Reports: <http://csus.edu/smartplanner/dashboard.html> and [http://csus.edu/irt/universityreporting/university\\_reports.html](http://csus.edu/irt/universityreporting/university_reports.html)
  - Access Reports to identify students: COGNOS> Public Folders> Student Reporting> Operational Reports> Smart Planner Project
    - **Communications Query:** Provides info about Smart Planner usage by College, Department, Class Level, and last activity in Smart Planner. about time and level of completed plans
    - **Course Interest by Student:** Identifies number of students interested in a course in a given semester; can email those students for a specific class to check on interest (helps make students feel we are paying attention to their Smart Planner)
    - **Usage by College/Department:** Provides info on students' use of Smart Planner and a snapshot of student's academic standing and which GE requirements have been satisfied.