MySAM Step-by-Step Guide

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1. Click Refresh ⟳ and Process New **Process New** to update the data and generate a new audit.

2. Click on the Class History link **Class History** to see an unofficial transcript.
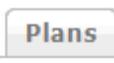
3. Go to the Plan Tab **Plans** and load the Active plan (or the appropriate template, if necessary).

Updating Students Who Already Have an Active Plan

4. The Default view is the calendar view which is read only and changes cannot be made
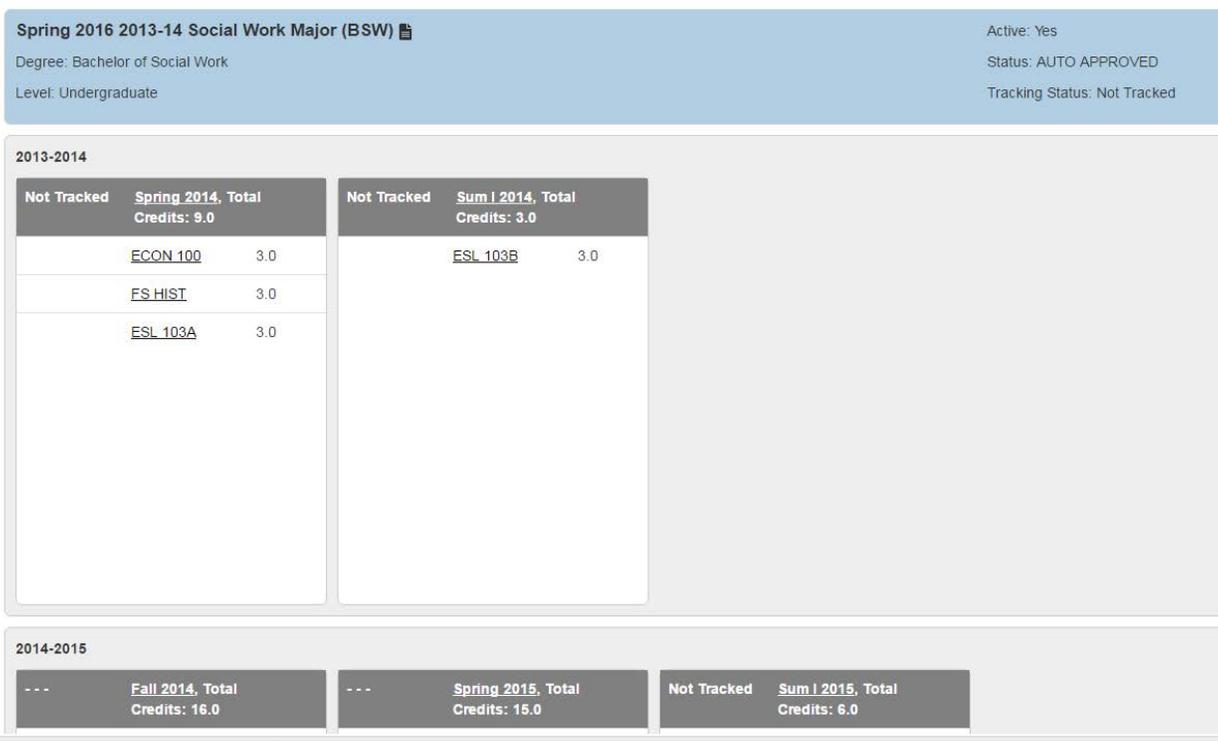
Spring 2016 2013-14 Social Work Major (BSW) 🗎		Active: Yes
Degree: Bachelor of Social Work		Status: AUTO APPROVED
Level: Undergraduate		Tracking Status: Not Tracked

2013-2014

Not Tracked	Spring 2014, Total Credits: 9.0		Not Tracked	Sum I 2014, Total Credits: 3.0
	ECON 100	3.0		ESL 103B	3.0
	FS HIST	3.0		
	ESL 103A	3.0		

2014-2015

- - -	Fall 2014, Total Credits: 16.0	- - -	Spring 2015, Total Credits: 15.0	Not Tracked	Sum I 2015, Total Credits: 6.0

5. To edit the plan click on "View:" then Edit

View: Calendar ▼   **View Plan List**   **New Plan**
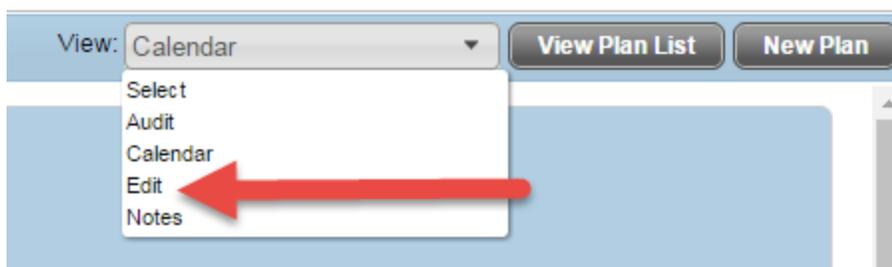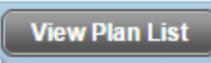
Select
Audit
Calendar
Edit ⬅
Notes

6. First step when editing the plan is to change the "Description" to the semester you are planning for

Ex: If you are preparing a plan for Spring 2017, then you need to change the description to Spring 2017

7. You then need to use the Save button.
8. Go to the current semester and look at the courses listed in the plan for the current semester. Compare it to the Class History for the same semester. If the courses are the same then nothing needs to be moved, if a student is enrolled in a course or dropped a course that was in the plan, then the plan needs to be adjusted accordingly

9. After making adjustments to the current semester, look to the next semester to see if the courses listed can be taken by the student. If they can, then Save the plan and you are done. If the student cannot take the courses in the next semester, you must adjust the plan accordingly.

Creating New Plans for Students who do not have Them

10. If student does not have a plan already created, you will be prompted to create a plan. (If a student has a plan please see Step 5).

You will choose Select Template, where you will be prompted to search for the template you desire. You should select (double-click) the template of the catalog year that the student was admitted and select the starting Fall term for the students catalog year.

a. If a student is a Spring admit, you would select the Fall of the catalog year the student is in.

11. If the student has a degree plan already you will select the plan that is active (that is the one that has a Y) and double click on it.
12. In the description field, update the description with the proper naming convention.
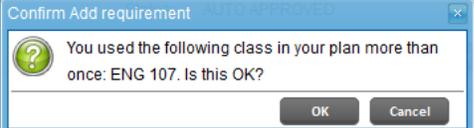
Description:	Spring 2014, 2013-14 Psychology Major (BS)	☑ Active	
Degree:	Bachelor of Science	Level:	Undergraduate
Tracking Status:	- - -	Status:	AUTO APPROVED
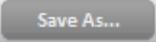
Select Save As... [Save As...] to create a new saved copy of the degree plan.
   a. Please note that the degree plans do not automatically save, so after every change you should select the Save button [Save] to save the plan.
   b. Please note the naming convention should reflect the current term in which the student's degree plan is being updated.
13. Review current term registration on Class History and update student's plan to match.
   a. If you are reviewing students Spring 2014 semester plan then use the courses the student is registered for in Spring 2014 on Class History.
14. Move any **non-critical** courses (in the current term) that the student is not registered for to a future term. Leave **critical** courses where they are.
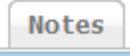   a. You must recreate the critical course in a future term. You will be prompted when adding the duplicate course [Confirm Add requirement — You used the following class in your plan more than once: ENG 107. Is this OK? OK Cancel] you should select OK.
15. Review the student's progress and recommend courses for the next term. Update the student's plan, accordingly.
16. Click the Audit button [Audit] to review a degree audit. Review unmet requirements (in red) and add the respective courses to the appropriate future term. If there are unmet requirements, it is likely that the student did not meet minimum grade requirements, the course was planned but not completed for a previous term, or the requirement was deleted from the plan.
17. Review student's progress (review on/off track indicators and overall progress (i.e., credit hours earned, Academic Standing)
18. Add a Plan Note [Notes] to let the student know if s/he is on/off track to graduate in 4 years.
19. If the student cannot feasibly graduate in 4 years:
   a. Add a new term(s) to the plan and update it, accordingly.
   b. Add a note explaining to the student that s/he cannot graduate in 4 years. Use this as an opportunity to discuss the student's career choice, other options, which goal (graduating in 4 years, completing this major) is the priority, Plan B advising, etc.
20. If a student misses an advising appointment, update his/her plan based on what the student should take the following term and notify the student that your recommendations are available via the notes tab. [Notes]