

DEGREE WORKS NOTES PROCEDURES

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REVISION HISTORY

Version	Date	Name	Description
1	2/15/16	Bracken	Final
2	4/29/21	Tammy W	Updated for Current Process (formerly named How To Enter Notes)
3	01/04/24	Jenna C	<u>Updated to reflect changes to Degreeworks 5.1.2</u>

INTRODUCTION AND PURPOSE

Degree Audits are used at UCR as a means for students and staff to track completion of curriculum requirements towards graduation. This procedure provides instruction on how to enter, view and delete notes related to a student's degree requirements.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Notes may only be modified by the original submitter.
2. All notes should be entered with objectivity and professionalism. FERPA gives students the right to review their record.
3. In general, notes should only be deleted on rare circumstances due to incorrect entries or typographical errors. All notes are considered to be a permanent record of a student's audit.
4. Notes entered into Degree Works should be degree audit or Degree Works plan related comments only. Other administrative notes are placed elsewhere.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Academic Departments
2. College Offices
3. Graduate Division
4. Registrar's Office

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Degree Works <https://degreeworkstest.ucr.edu/ResponsiveDashboard/> follow along.

FORMS

The degree audit is located within Degree Works. There are no forms in Degree Works.

PROCEDURES

VIEW NOTES

STEPS

1. Notes saved to a student's record are visible in the following worksheet formats: the Registrar Report, Student View, and Diagnostics Report worksheet formats.

- Go directly to the ellipses and click on **Notes** to see a list of existing notes for the student.

The screenshot shows the 'Worksheets' page. At the top right, there is a menu icon (three vertical dots) highlighted with a yellow box. Below the title, it says 'Data refreshed 01/03/2024 3:56 AM'. There are three search filters: 'Student ID' with a clear button, 'Name', and 'Degree Bachelor of Science'. An 'Advanced Search' link is at the bottom left.

ADDING NOTES

STEPS (NOTES TAB)

- From the **Notes tab** click **Add A New Note**.

Notes

The screenshot shows a list of notes. The first note is titled 'Created on 10/10/2023' and says 'By 105 unit maximum reached'. The second note is titled 'Created on 07/25/2023' and says 'By Approved to Exceed 216'. A blue button labeled 'ADD A NEW NOTE' is highlighted with a yellow box at the bottom right.

- Select the checkbox for **“Not available to student”**.
 - Although there is an option to choose ‘Not available to student,’ the notes will be seen by other staff members and in certain circumstances, students, so please use factual, objective, friendly, and professional language.
 - For example, if an Advisor prints the Student View worksheet using the Advisor’s credentials and gives it to the student, the notes will be displayed (including those marked as not available to student or Internal).
- Add the **note text** (either add a Pre-Defined Note or a Free-Form Note – do one of the steps below):
 - Add a Pre-defined Note:
 - Select a predefined note from the drop-down list. Predefined notes can be edited.

Add a new note



Predefined notes



105 unit maximum reached

Approved to Exceed 216

Breadth requirements

Catalog Year

Degree progress

Double major

Major requirements

Minor requirements

Partial IGETC received

Student requested waiver or exception to

OR

b. Add a Free-form Note:

1. A free-form note can be expanded upon up to 2,016 characters.
2. A free-form note can be created by clicking directly into the empty box below the predefined drop-down list and typing your note. You can also edit the pre-defined note after selecting it, as shown below.

Add a new note



Predefined notes

Add description

Not available to student

CANCEL SAVE NOTE

4. When finished, click **Save Note**.

Add a new note



Predefined notes

Add description
Advanced to Candidacy (TEST NOTE) 1/3/23

Not available to student

CANCEL SAVE NOTE

5. The following message will display confirming the note was saved.

Note added to audit

ADDING NOTES FOR STUDENTS WITH MORE THAN ONE DEGREE OR MAJOR

STEPS

1. Notes entered on graduate level audits will be visible on all graduate audits regardless of degree or major; the same goes for undergraduate level audits.
2. If the student is earning more than one degree a new audit will need to be processed for each in order to view the added note.
 - a. After entering a note and running a new audit, you will need to toggle to the second degree, click on the Worksheets tab, then click on Process New to see the note applied to the secondary degree audit.
3. When entering notes for students with double majors, specify which major the note belongs to.

EDITING NOTES

STEPS

1. Most of the time notes should not be modified in order to keep an accurate record of what took place. Instead of modifying a note, add information by creating a new note. A good example of when to modify a note would be to correct a misspelled word.
 Note: **Editing a note does not change the creation date.** Therefore, it is a good idea to add a new note instead.
2. From the **Notes tab** click **Edit Notes**.

Notes



Created on 08/23/2024

By Connor, Jenna **Status** Internal

Test note 8/23/24

- ⋮
- View note
- Edit note
- Delete note

ADD A NEW NOTE

3. Only the notes the user has access to modify will be displayed.
4. To modify a note, click in the text box for the note you wish to modify and enter your changes.
5. If you did not mark "Not available to student" as indicated in the Adding Notes section you can make that selection here by clicking the box next to the note under the Internal column.
6. To save your modifications, **click the save note button at the bottom of the note.** This will save the changes.

DELETING NOTES

STEPS

- Notes should *only* be deleted when an incorrect entry or typo has occurred. All notes are considered to be part of the student's permanent record.
- From the Notes tab click **Delete Notes**.
- To delete a note click the note icon located to the right of the note to be deleted. Even though you can view all notes in the *Delete Notes* window, **you can only delete the notes you have added**.

Notes



Created on 08/23/2024

By Connor, Jenna Status Internal

Test note 8/23/24

- View note
- Edit note
- Delete note

ADD A NEW NOTE

- A note deletion message will display confirming the note was deleted.

PRECAUTIONS/ADVISEMENT ON NOTES

Notes marked as **Not available to student** in the Add Note section or as **Internal** in the Modify Notes section will show on audit reports printed (including PDFs) by non-student users such as advisors, faculty members, or Registrars. Hence, if a student visits an advisor or faculty member and that person prints an audit report for that student, all notes flagged as unavailable as previously described will be visible to that student. The View Notes section will show an indicator that it is flagged as Internal to help remind users.

Add Note
>

Modify Notes

Delete Notes

Add New Note

Enter your note and click the Save Note button

Not available to student

Choose a predefined note from the list below
▼

FINAL QUIZ

1. Can pre-defined notes be edited? Yes or No
 - a. YES
2. Do you have to Run New Audit for the notes to show in the degree Audit? Yes or No
 - a. NO
3. Notes entered on graduate level audits will be visible on all graduate audits regardless of degree or major; the same goes for undergraduate level audits.
 - a. TRUE
4. Notes should *only* be deleted when an incorrect entry or typo has occurred. All notes are considered to be part of the student's permanent record.
 - a. TRUE
5. Modifying a note does not change the creation date. Therefore, it is a good idea to add a new note instead.
 - a. TRUE