

Smart Planner FAQ's

Q: What is Smart Planner?

A: Smart Planner is a planning tool to assist students and advisors in mapping courses towards degree completion and to provide students with the best recommended sequence of courses for success. Students and advisors should continue to refer to the Academic Advisement Report to ensure all degree requirements are met including non-sequenced requirements (GPA, Graduate Writing Requirement, etc.). For convenience, the Smart Planner contains a link to the Advising Report (Academic Advisement Report) with planned courses which are represented with a blue star to help students determine if they are planning appropriately for those requirements that cannot be placed into a Smart Planner sequence.

Q: Who can use the Smart Planner?

A: Smart Planner is available to all undergraduate students in catalogs years 2016 and beyond. Future catalog years will be available as the catalog is published each academic year.

Q: How are students being made aware of Smart Planner?

A: Smart Planner is mentioned in various emails sent from the Office of the Registrar, anytime students are encouraged to register for classes a link to Smart Planner to assist them in course selections will accompany that email. Further, the tool is in heavy use by Academic Advising Programs, so many students are likely to encounter the tool there.

Q: How can a student access Smart Planner?

A: If Smart Planner has been published for a student's major and/or minor and catalog year, students can access Smart Planner from within their Student Center under Academics.

Q: How can an advisor access a student's information in Smart Planner?

A: Advisors have access to Smart Planner in the Advisee Student Center. Advisors should be aware that by clicking on the Smart Planner link updates to the students plan may occur. Updates occur when course substitutions or transfer credit is applied, a course is cancelled, etc.

Q: What is the difference between the Smart Planner and the Academic Advisement Report (CAAR)?

A: Smart Planner is a planning tool. The CAAR still remains the authoritative source for all graduation requirements.

Some requirements cannot be accounted for in Smart Planner, such as Grade Point Average requirements, and Graduate Writing Exam, and units in residence. Since these requirements can be met while completing other requirements, Smart Planner cannot place those requirements into a sequence.

It is recommended that students and advisors run an Academic Requirements Report with Planned Courses from within Smart Planner to ensure all degree requirements are being met.

Q: Where can a student or advisor access help documents?

A: Help documents can be accessed through the Smart Planner link or from our web page.

Q: Who should I contact if I need additional assistance with the Smart Planner?

A: Students who need assistance with Smart Planner should contact their major advisor, and Department chair. Staff and Faculty who need assistance with the Smart Planner should contact Shari Smiljanic-Villa ssmiljanic-villa@csum.edu

Q: How can a student use the new Smart Planner tool if enrolled in a previous catalog?

A: Smart Planner is available for students who are following the 2016-17 or later catalog. A student may consult with their advisor about changing to a 2016-2017 or later catalog, but this may not be appropriate for all students and could delay graduation.

Q: Can a student change their major through Smart Planner tool?

A: No. The student must fill out a change of major application form and go through the application process.

Q: If a student changes their major, will their new major curriculum plan be displayed on Smart Planner?

A: Yes, if that major and catalog year have been built in Smart Planner. Change of major requests are processed through the Department, Admission's and Registrar's Office. Once the change of major is entered it is immediately available in Smart Planner.

Q: Where does Smart Planner display the student's catalog year?

A: On Smart Planner's Overview page, the student's catalog year and degree plan(s) are listed just below the graphs as well as at the top of the Smart Planner main page.

Q: If a student's record becomes inactive, can they use Smart Planner when they enroll again at CMA?

A: Yes, as long as the student is declared in a major in the 2016-17 or later catalog.

Q: Will transfer credits appear in Smart Planner?

A: Yes. Smart Planner utilizes transfer and test credit and related course information from the student's Academic Advisement Report (CAAR).

Q: Does Smart Planner plan for multiple majors and/or minors?

A: Yes, if all majors or minors have been published in the Smart Planner. The overview page of the planner will indicate which majors/minors are being accounted for in the Smart Planner.

Q: How does Smart Planner account for changes to curricula and academic policies?

A: Smart Planner will be updated and maintained regularly to reflect curriculum changes in degree requirements as approved by the University Curriculum Committee. Academic policies are reflected in Smart Planner when possible, but students and advisors are encouraged to review the Academic Advisement Report regularly.

Q: Are substitutions integrated into Smart Planner?

A: Yes, course substitutions are accounted for in Smart Planner and are removed from the planned course in the roadmap.

Tip: If you know a substitution has been submitted, but has not been processed, you may use the 'Remove' feature to move the requirement to the 'Manually Removed Courses' section at the bottom of the plan. **Once the substitution is processed, the requirement will be satisfied and no longer appear in the "Manually Removed Courses" section of the Smart Planner.**

Q: Does Smart Planner track for general elective requirements?

A: Yes. The Smart Planner does account for general electives and will automatically fill general elective requirements where it can find eligible courses that are in progress or completed.

Tip: A student may use the 'Select' link to identify a preferred elective course in their Smart Planner or view completed credits that could apply to electives that are remaining.

Q: Why are courses appearing under the Unassigned Requirements section?

A: Normally this occurs when there are not enough units in the remaining semesters for the unassigned courses to be placed. Courses may also appear here if a student has not completed the necessary pre-requirements.

Tip: Under "Preferences" in the Smart Planner add semesters, terms and/or additional units to existing semesters to resolve this issue. Once you have updated your preferences, click "Refresh Suggestions" to populate your new preferences.

Students who need assistance resolving unassigned requirements should meet with their department advisor. Staff/Faculty who need assistance determining why a course is in unassigned requirements should consult Shari Smiljanic-Villa email ssmiljanic-villa@csum.edu.

Q: Does Smart Planner capture a failed course?

A: Yes. If a student fails a course required for their degree, the course will repopulate in a later term in the Smart Planner.

Q: Why is the 'Off Track' indicator appearing in the Smart Planner?

A: Click on the 'Off Track' button to get specific information on why it is occurring in your Smart Planner.

Students who need assistance regarding the "Off Track" indicator should meet with their department advisor. Staff/Faculty who need assistance determining why the "Off Track" indicator is appearing should consult Shari Smiljanic-Villa email ssmiljanic-villa@csum.edu.

Q: What if my major has courses or an internship required in a summer term?

A: Smart Planner will automatically suggest these courses in the summer term, as they have been determined to be part of the recommended path for student success.

Q: What is the difference between an "error" and a "warning" in the message pop-ups?

A: An error indicates that a student or advisor cannot proceed with a change until the error is resolved. A warning serves as a cautionary notice; it will let the student or advisor proceed with making a change.

Q: What does "Lock" do?

A: By checking the "Lock" box, the specified course will remain in that term. If the Refresh Suggestions button is clicked, courses will arrange around the requirement locked to that term. A course can be locked for various reasons: it was placed into a specific term on the Arrange My Plan page, the lock option is clicked, or the course is chosen by the "Add Course" link.

Please note you can uncheck the "Lock" box to allow courses to rearrange back to the original sequence.

Q: What does "Refresh Suggestions" do?

A: Clicking the Refresh Suggestions button restores the recommended plan back to its original sequence of courses, except for courses that have been locked. Locked courses will remain in the term for which they have been locked.

Q: What is the difference between "Refresh Defaults" under Edit Preferences: "Refresh Suggestions" on the main screen and "Reset" on Arrange My Plan?

A: Refresh Defaults – restores the term and unit preferences back to the default for that specific plan.
Refresh Suggestions – sets the recommended order of courses back to default for the major, with the exception of courses that have been locked into a term.
Reset – allows students to undo drag and drop changes made during the current session.

Q: How are changes saved in Smart Planner?

A: Smart Planner saves automatically every time you make a change within the tool.