

## Smart Planner - Frequently Asked Questions

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### **Q: What is Smart Planner?**

A: Smart Planner is an interactive online planning tool to assist students and advisors in mapping courses towards degree completion by providing a curriculum plan that lays out the best-recommended sequence of course requirements for success. Students and advisors should continue to refer to the Academic Requirements Report to ensure all degree requirements are met.

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### **Q: Who can use Smart Planner?**

A: Smart Planner is available for all undergraduate majors starting with the 2013 catalog year. Future catalog years will be available as the published catalog becomes available each academic year.

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### **Q: How can a student access Smart Planner?**

A: Students can access Smart Planner by clicking the "Smart Planner" link under the Academics section in their Student Center on the [MyCSUDH portal](#).

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

A: Advisors must complete a Smart Planner training to obtain access. Once advisors receive access, they can view their students' Smart Planner plans through the Advisee Student Center. Advisors should be aware that changes they make in Smart Planner may update the student's curriculum plan. Updates also occur automatically after application of course substitutions or transfer credits, cancellation of a course, etc.

Advisors who would like to request Smart Planner training should email [admit@csudh.edu](mailto:admit@csudh.edu) with the email subject line "Smart Planner Training Request for Advisor."

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**Q: What is the difference between Smart Planner and the Academic Requirements Report?**

A: Smart Planner is an interactive tool for planning courses towards graduation. The Academic Requirements Report is the authoritative source for all graduation requirements.

Smart Planner is unable to account for some requirements such as Grade Point Average and units in residence. Since students can complete these requirements while completing other requirements, Smart Planner cannot place these requirements into a sequence on a plan.

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

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

A: Help documents are available on the CSUDH website [Smart Planner](#) page.

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**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 department advisor.

Staff and Faculty who need assistance with Smart Planner should contact Carolyn Veek, Degree Audit Analyst, or Ayumi Nakamoto, Student Support Analyst, in the Records & Registration Office.

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**Q: Can a student change his/her major through Smart Planner?**

A: No. The student must print and complete the Change Undergraduate Major/Minor form available on the [CSUDH Records & Registration Forms](#) web page. Once the major advisor has signed their approval, the student must submit the form to the Admissions & Records Office in Room WH-290 for processing.

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

A: Yes. The student will see their new curriculum plan in Smart Planner as soon as the Registrar's Office processes the change of major request and as long as the major and catalog year have been built in Smart Planner. Students should note that change of major requests can take several days to process.

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

A: The student's catalog year and major(s)/minor(s) are listed just below the graphs on Smart Planner's Overview page as well as in the "My Area of Study" section on the main curriculum plan page.

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**Q: Will transfer credits appear in Smart Planner?**

A: Yes and No. Smart Planner utilizes transfer and test credit as well as related course information from the student's Academic Requirements Report (ARR) to determine what courses should be included on the curriculum plan. Transfer and test credits that satisfy requirements will appear in Smart Planner once the student submits official transcripts and the Admissions & Records Office processes the credits.

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

A: Yes, if all of the student's majors/minors are available in Smart Planner. The Overview page will indicate which of the student's majors/minors Smart Planner is accounting for in the curriculum plan.

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

Smart Planner receives regular updates and maintenance to reflect curriculum changes in degree requirements as approved by the University Curriculum Committee. Smart Planner reflects academic policies in the curriculum plan when possible, but students and advisors are encouraged to review the Academic Requirements Report regularly for authoritative status of all graduation requirements.

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**Q: Are substitutions integrated into Smart Planner?**

A: Yes. Smart Planner accounts for course substitutions and removes fulfilled requirements from the curriculum plan.

Tip: If you are waiting for a submitted substitution request to be processed, you may use the “Remove” feature to move the requirement to the “Manually Removed Courses” section at the bottom of the curriculum plan. Once the substitution is processed, the requirement will be satisfied and no longer appear in the “Manually Removed Courses” section of Smart Planner.

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**Q: Does Smart Planner track for general elective requirements?**

A: Yes. Smart Planner accounts for general electives and automatically fills general elective requirements when it finds eligible courses that are in progress or completed. Students will see an “Elective to Meet 120” or “Additional Units” requirement if they need to complete general electives.

Tip: Students may use the “Select” link next to their “Elective to Meet 120” or “Additional Units” requirement in Smart Planner to identify a preferred elective course.

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

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

Tip: In Smart Planner, click “Edit Preferences” and add semesters, intersession terms and/or additional units to existing terms to resolve this issue. Once you have updated your preferences and returned to the main curriculum plan, click the “Refresh Suggestions” button to restore the best-recommended sequence of courses left for completion.

Students who need assistance resolving unassigned requirements should meet with their department advisor.

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**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.

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

A: An error indicates there is an issue with the requested change and the student or advisor will not be able to proceed until the error is resolved. A warning serves as a cautionary notice; the student or advisor will be able to proceed with making a change to the curriculum plan.

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**Q: What does “Lock” do?**

A: Checking the “Lock” box keeps the specified requirement/course in that term. If the student clicks the “Refresh Suggestions” button, Smart Planner will restore the curriculum plan back to the original best-recommended sequence of courses but will keep locked courses in the term they have been locked into. Students can lock a course by placing it into a specific term through the Arrange My Plan page, clicking the “Lock” option, or selecting the course through the “Add Course” link.

Students can uncheck the “Lock” box to allow courses to rearrange back to the original sequence.

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**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.

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**Q: What is the difference between “Reset Defaults” on the Edit Preferences page and “Refresh Suggestions” on the main screen?**

A: “Reset 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 the default for the major with the exception of courses that students have locked into a term.

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**Q: How are changes saved in Smart Planner?**

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

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