UM Degree Training Manual
for Advisors

UMdegree: Making Plans for Graduation Advising and Planning Tool

Welcome to UMDegree, a resource for academic advising and graduation checkout

- Centralizes advising and scheduling resources through hyperlinks to catalog information, class schedules, transcripts, help desk services, and FAQs
- Supports real-time delivery of academic advice through intuitive web interfaces
- Minimizes errors through consistent degree plans
- Supports more timely degree certification
- Reduces paperwork and manual degree check sheets

UMdegree: Making plans for graduation!

**AT THE UNIVERSITY OF MEMPHIS, WE ARE DRIVEN BY DOING.**
UMdegree Training Manual for Advisors

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Purpose of the manual: Introduce academic advisors to UMdegree at The University of Memphis

Objectives: At the end of the manual, advisors should be able to:

1. find students using the UMdegree search methods
2. view and understand the components of a student UMdegree worksheet and its requirements
3. view and understand a UMdegree “what if” worksheet
4. begin using UMdegree to submit requests for General Education petitions
5. see and practice the functionality of notes in UMdegree
6. review GPA calculators delivered with UMdegree
Step 1) Login in to myMemphis

Step 2) Click on Advising Tab

Step 3) Find the UMdegree tile

Step 4) Click on the UMdegree logo

Step 5) If you are not logged in by SSO, login using your myMemphis/email username and password
Welcome to UMdegree

This is the first page you will see once you login to UMdegree.
**UMdegree**

**How to Find Students**

**By student ID:**
If you know the student’s U number, you can enter it here and hit the enter key on your keyboard.

It must be the UID (**NOT** the social security number) following the `U########` format. Capitalization of the “U” will not affect search.

**By student name:**
If you do not know the students ID, the student can still be found using the Advanced Search. Using the Advanced Search will take you to a different menu on a pop-up screen.

**Advanced Search:**
The Advanced Search provides advisors with some additional ability to find individual students and groups of students based on search criteria. Each item has a pull down menu that lists the options for that item. Combine criteria to narrow your search.

**Step 1)** Click Advanced Search  
**Step 2)** The Find Students box will appear

### Find Students

<table>
<thead>
<tr>
<th>Student ID</th>
<th>First/middle name</th>
<th>Last name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum</th>
<th>Degree</th>
<th>Classification</th>
<th>Catalog year</th>
<th>Major (0/255)</th>
<th>Minor (0/207)</th>
<th>College (0/15)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Concentration (0/367)</th>
<th>Custom</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Find Students]
Step 3) Students can be searched by either the first or last name (see example). Click the search button to begin the search.

<table>
<thead>
<tr>
<th>Student ID</th>
<th>First/middle name</th>
<th>Last name</th>
<th>Degree</th>
<th>Major</th>
<th>Level</th>
<th>Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>U0083053</td>
<td>Kerr, Amelia May</td>
<td></td>
<td>BSED</td>
<td>Integrative Studies</td>
<td>UG</td>
<td>Junior</td>
</tr>
<tr>
<td>U00787405</td>
<td>Kerr, Alexandria</td>
<td></td>
<td>BS</td>
<td>Biology</td>
<td>UG</td>
<td>Junior</td>
</tr>
</tbody>
</table>

Step 4) In the lower portion labeled "Students Found", a list of students will appear with check boxes in blue next to their names. Unselect all the students by clicking the top check box (highlighted below). This will uncheck all the students in the list. Then Click the checkboxes to highlight the student(s) that you are interested in viewing and hit Select.
Step 5) What should appear next is the Students *UMdegree Worksheet*

The UMdegree Worksheet gives the most recent information regarding the student’s academic affairs. The worksheet is divided into **blocks**. Each block has a title and a box in the header that indicates the status as the requirements in that block are met. The box will say "Incomplete", "In-Progress", or "Complete." The block headers have different information based on the block type. All the student worksheets begin with a student information section followed by **Degree Progress circles**.

**Student Information Section**
Contains basic student information such as UID, the assigned advisor, major, minor, and concentration. This information is pulled directly from Banner.

**Progress Circles**
Displays the percentage of the student’s requirement progress.

**Degree Block**
Contains all the requirements for the student’s program. Individual requirements are hyperlinked to the section for that requirement/block until the requirement is complete.

**Requirement Blocks**
Includes the Major Block which contains all the requirements for the student’s declared major(s) and may also include any minors and/or concentration blocks.

**If you selected more than one student, you will see blank boxes on the student worksheet. You will need to select the student you wish to view by clicking on the select student box. A drop down of all the students you selected will appear.**
General Education Block
Contains all the general education courses that the student has or has not completed for graduation.

Other Blocks will display in certain degree programs depending on the requirements for that program.

Open Electives and Unapplied Electives Blocks
Open Electives are the true electives needed to complete the total degree credit total. Not all programs will have Open Electives due to the way the program is designed. Unapplied Electives are credits earned but not needed in the open electives and are not currently being used to fulfill requirements.

Insufficient Courses Block
Contains courses that carry unsuccessful grades (F, W, sometimes D) and first (second, third) attempts of repeated courses.

In-progress
Contains course that the student is currently taking or is registered for in a future term. See the term to differentiate.

Legend
Contains the symbols and definitions used for the UMdegree worksheet.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>Complete</td>
</tr>
<tr>
<td>☐</td>
<td>Complete (with classes in-progress)</td>
</tr>
<tr>
<td>☐</td>
<td>Prerequisite</td>
</tr>
<tr>
<td>☐</td>
<td>Repeated class</td>
</tr>
<tr>
<td>☐</td>
<td>Not complete</td>
</tr>
<tr>
<td>☐</td>
<td>Nearly complete - see advisor</td>
</tr>
<tr>
<td>☐</td>
<td>Any course number</td>
</tr>
</tbody>
</table>

Disclaimer
Statement of the intended use of the UMdegree Worksheet.

Disclaimer
You are encouraged to use this degree audit report as a guide when planning your progress toward completion of the above requirements. Contact your academic advisor for assistance in interpreting this report or regarding your official degree/certificate completion status. This audit is not your academic transcript and it is not official notification of completion of degree or certificate requirements. Please contact the Registrar's Office to obtain a copy of your official academic transcript.
The What-If tab allows you to create audit scenarios based upon changing a major or degree path.

**Step 1)** Select an Academic Year (catalog)
**Step 2)** Select a degree

- **What-If Analysis**
  - Use current curriculum
  - In-progress classes
  - Preregistered classes

- **Program**
  - Catalog year: 2022-2023
  - Degree: BA
  - Level: Undergraduate

- **Areas of study**
  - Major
  - Minor
  - College
  - Concentration

**Step 3)** Select a Major
**Step 4)** Select a College (this is required for the What-If to process correctly for GRADUATE programs)
**Step 5)** Other criteria such as minor or concentration can be added as well

**Step 6)** Future courses related to this new major can also be added to the scenario under *Future Classes*

**Step 7)** Click the *Process button* *(at bottom)*

What you will see next is the *What If* scenario for that student. It will look just like that student’s real worksheet except this worksheet is directed towards the new major requirements for that student.
**Look Ahead**

Allows you to enter future course(s) and view a student's worksheet with those courses applied. Look Ahead may also be used during a What-If scenario.

To use the Look Ahead option when running a What-If, choose the desired curriculum and add the future classes at the bottom of the box. Then click Process.

This will show the audit with the new curriculum information selected and include the future classes the student is planning on taking.

To see an audit showing courses the student plans to register in future terms using the student's CURRENT CURRICULUM, click the "Use Current Curriculum" box under the What-If Analysis header. Then use the form to enter the subject code and course number of each anticipated course.

Once the list of future classes has been created, click the Process button to apply them to the audit. Look Ahead scenarios are not saved.
UMdegree

Petitions

The Petitions tab allows users to enter requests for exceptions for General Education requirements. Any exception requests for major, concentrations, or minors should be sent to the college to be applied. To create a petition, click the three dots on the top right hand side of the audit, then select Petitions.

If previous petitions have been created for the student, they will show in the box. You can filter by Petition Status by using the drop down menu at the top of the box.

The petitions screen shows all petitions that have been entered on the student's behalf.

Petitions can either be waiting for approval, approved, applied as exceptions or rejected. All new petitions have a default status of waiting for approval when first created. Once a petition is created, it can be acted upon by the appropriate approver.
To create a new petition, click the Add Petition button. This will bring up a text box where you can enter the text for the petition.

![Add a new petition](image)

Please provide the following information with your petition:

1. Prefix, number, and name of course that would normally satisfy the requirement
2. Prefix, number, name, (and if transfer course, list institution) of the substitution course
3. Requirement to which the course is relevant in the student’s General Education requirements.

**Please only submit one petition for each course action. Submitting several course actions on one petition causes problems when one action may need to be rejected.**

Remember that you cannot make a petition on behalf of a student until you have accessed the student in UMdegree. Think of the petition entry more like an email than a form to fill out. Sometimes more information will help the approver. Remember also that the petition may have to be reviewed by a series of approvers.

Once you have entered the text for the petition, click the Submit Petition button to save the petition to the database. A message will appear telling you your petition was added successfully.
To add another petition, click the Add Petition button again and repeat the process.

To modify a petition, click the three dots in the top right hand corner of the Petition box. Click Edit Petition, modify the petition and click the Save Petition button at the bottom to save your changes. **Only petitions with a status of Waiting Approval may be modified.** You will not be able to modify petitions created by others.
To delete a petition, click Delete Petition from the three dot drop down. Only petitions created by you can be deleted by you. **Petitions that have been approved, applied as exceptions or rejected cannot be deleted.**

**Petitions**

<table>
<thead>
<tr>
<th>Petition status</th>
<th>All petitions</th>
</tr>
</thead>
</table>

- **Created on 07/14/2023**
- **By Kerr, Karl S**
- **Status: Awaiting approval**
- **Petition Modified**

**Delete petition**

Are you sure you want to permanently delete this petition?

- **CANCEL**
- **DELETE PETITION**

**Petition deleted**

There are no petitions for this student.

**Petitions**

Petitions will be approved/applied in a random timeframe, but usually within 48 hours. Please make a record of the students for whom you make petitions so you can go back to the petitions tab or the student worksheet to view the decision. There is no system generated response to petitions.
UMdegree

Notes

The Notes tab allows UMdegree users to document academic advising on the UMdegree records. The notes can be used for internal use only or they can be made available to the student through UMdegree on the web. **Notes made available to the student appear on the worksheet in a Notes section at the bottom of the report.** To access the Notes screen, click on the Notes tab by clicking the three dots on the top right hand corner of the audit. The section opens to a view of the notes created for the student.

There are predefined notes available to capture the advising session. An option to make the comment NOT AVAILABLE to students also exists.

**In UMdegree, all notes are public by default. The option to make a note NOT AVAILABLE to the student is provided. Please use discretion when making notes. Notes are part of the student educational record.**

Click on the Add a New Note button. Use the pre-defined notes from the drop down or add a free text comment or use a combination of both. To make the note internal only (not viewable to the student), click the "Not available to student" box. Click Save Note to save the note to the audit.
Notes created will appear at the bottom of the worksheet.

**Notes marked as "Not available to student" will show the status as INTERNAL.**

You can modify or delete notes in a manner similar to the process for modifying and deleting petitions.
Click the three dots in the upper right hand corner of the note you wish to modify or delete.
Then chose the action - Edit Note or Delete Note.

Modify the note and click Save Note at the bottom.
Graduation Calculator: The current GPA defaults. Enter the credits required and credits remaining. Click the Calculate button. The purpose of the Graduation Calculator is to give the student a general view of what average GPA they will need to achieve over their final "X" credits in order to achieve their desired GPA.

Click the three dots in the top right hand corner of the audit to access the GPA Calculator.

In some cases, this calculator will be useful to inform the student that the desired GPA is not possible to achieve (considering the number of credits remaining).
In short, this calculator helps students to set long-term general goals.

**GPA Calculator**

<table>
<thead>
<tr>
<th>Graduation Calculator</th>
<th>Term Calculator</th>
<th>Advice Calculator</th>
</tr>
</thead>
</table>

To achieve your desired GPA, you would need to average higher than a 4.0. You would need to average a 7.647

| Current GPA  | 2.89  |
| Credits remaining | 28   |
| Credits required  | 120  |
| Desired GPA      | 4.0   |

You need to average a 3.361 over your final 28 credits to graduate with your desired GPA.

| Current GPA  | 2.89  |
| Credits remaining | 28   |
| Credits required  | 120  |
| Desired GPA      | 3.0   |

**Term Calculator:**

Current GPA and credits completed to date default. The current classes will default. Enter the credits if necessary and enter the projected grades. (You can also add a course the student might be considering but for which they haven’t yet registered.) Click the Calculate button. You can change the classes and the grades at any time and recalculate. The term calculator can be used for goal-setting as well as mapping paths to avoid probation, achieve honors, etc.

<table>
<thead>
<tr>
<th>Calculated GPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>By achieving the grades listed here, your GPA at the end of the term will be 3.885</td>
</tr>
<tr>
<td>Current GPA</td>
</tr>
<tr>
<td>Credits earned</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>course</th>
<th>credits</th>
<th>grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMM 2381</td>
<td>3</td>
<td>A+</td>
</tr>
<tr>
<td>ENGL 1020</td>
<td>3</td>
<td>A+</td>
</tr>
</tbody>
</table>
Advice Calculator

Students should enter their desired GPA and click **Calculate**. Advice will be displayed depending on the desired GPA and the chances—or unrealistic chances—of meeting that goal. Note: Although the GPA and hours are already plugged in, these fields can be revised.

One example

**GPA Calculator**

To achieve your desired GPA, you need one of the following:

- 53 credits at 3.0 (B) grade average
- 32 credits at 2.7 (B-) grade average
- 23 credits at 2.3 (C+) grade average
- 18 credits at 2.0 (C) grade average
- 15 credits at 1.7 (C-) grade average
- 13 credits at 1.3 (D+) grade average
- 11 credits at 1.0 (D) grade average
- 8 credits at 0.0 (F) grade average
- 6 credits at 0.0 (F) grade average

Note: Results that would require you to take more than 150 credits have been omitted.

| Current GPA | 3.765 |
| Credits earned | 100 |
| Desired GPA | 3.5 |

Another example of advice (after having altered the number of credits):

**GPA Calculator**

To achieve your desired GPA, you need one of the following:

- 37 credits at 4.0 (A+) grade average
- 37 credits at 4.0 (A) grade average
- 47 credits at 3.8 (A-) grade average

Note: Results that would require you to take more than 150 credits have been omitted.

| Current GPA | 3.0 |
| Credits earned | 110 |
| Desired GPA | 3.25 |