

Course Plan Management (Academic Planning)

Last Modified on 12/17/2025 10:01 am CST

This document serves as a resource that provides more detailed information regarding how the Course Plan tool functions.

New Students (After Start of School Year)

Courses can be planned for the current year if a new student enrolled after the start of the school year meets the following criteria:

- No scheduled course sections in the current year (no roster records).
- No transcript records in the current year.

Course plan alerts are applicable for the current year, as are grade level planning alerts.

Transfer Students With Previously Planned Courses

A student with an existing Course Plan who transfers to another school within the district may have course numbers and/or course names on their plan that do not match course numbers and names in their new school of enrollment, or have courses on their plan that are inactive in their new school. Administrators at the new school can review these discrepancies and modify the course plan accordingly.

- If the course numbers match, but the course names do not match, the student still retains that planned record; however, note that this may not be the correct course that needs to be planned.
- An Invalid course is defined as a course that existed in a student's plan at the previous school but does not exist in the student's new school. Courses match at the Course Number level. If a course with a number of 1234 in the previous school is Math and in the new school is English, the course is technically not considered invalid because there is a match.
- As soon as the Course Plan tool is accessed, an Invalid Courses Found pop-up message displays, indicating which courses need to be corrected (either by ignoring this message as they are deleted when the course plan is saved, or by copying the course to the clipboard and later modifying the course plan).

Invalid Courses Found

The following course numbers could not be found within the student's newest school of enrollment.

Warning: These records are deleted the first time this Course Plan is saved!

AGR8140S1 Alt Energy Prod/Dev S1
AGR8140S2 Alt Energy Prod/Dev S2
AGR8150S1 Intro Sust Energy/Ag S1
AGR8150S2 Intro Sust Energy/Ag S2

Copy to Clipboard

Continue

Invalid Course Alert

The invalid course number displays in red text with other Invalid Courses. Click the Exclamation Point to view the pop-up warning again to see the invalid courses.

Program: CHS Requirements (Eff. 2018) (Graduation)

Academic Program: Natural Sciences (CTE)

Approved by parent/legal guardian

ALERT: Insufficient Academic Program participation: Students must complete 2 of the core Academic Programs to graduate

Grade: 09 65.0 / 60.0

Grade: 10 70.0 / 70.0

Grade: 11 20.0 / 50.0

Invalid Courses

ALERT: Planned courses listed here do not match course numbers in current school. These planned courses are deleted upon save.

1007 3-D Design

2020 Advanced Floral Design II

Invalid Courses on Course Plan

To capture invalid course information for correction:

1. Click **Copy to Clipboard** (only copies course number and name)
2. Paste the copied information to an an application (i.e. Word or Notepad).
3. Add the student's name to capture which student needs the course numbers corrected.
4. Click **Continue**. This clears the popup.
5. Modify the Course Plan and **Save**.
6. **The first time modifications are saved to the Course Plan, the invalid course records are deleted.**

Course Plan Management

The following section provides details and information on the overall management of student course plans.

Course Plan Warnings, Alerts and Errors

► [Click here to expand...](#)

Each time a change is made on the Course Plan, all rules and requirements are reevaluated and updated alerts and messages display. The Course plan does not need to be saved to show these alerts. When the alerts have been satisfied, the alert text is removed automatically.

Warnings

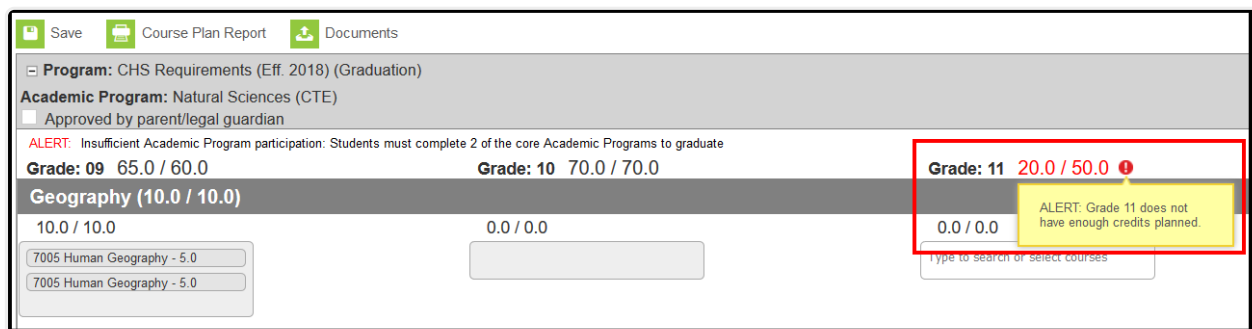
- Warnings display in black font when there is a failure to meet a Credit Requirement or a Course Requirement.
- Course Plans can still be saved when warnings exist.

Alerts and Errors

- A counselor can still save a plan when there is an error. Errors occur when there is a course plan rule violation.

Students who have an Academic Plan that contains an error are not able to save changes made to their course plan from the Portal.

- Alerts display when:
 - A grade does not have enough credits planned. This displays next to the Grade Level itself, not with the other alerts.
 - A credit type does not have enough credits planned.



The screenshot shows the 'Course Plan Report' interface. At the top, there are tabs for 'Save', 'Course Plan Report', and 'Documents'. Below the tabs, the program is set to 'CHS Requirements (Eff. 2018) (Graduation)' and the academic program is 'Natural Sciences (CTE)'. A checkbox for 'Approved by parent/legal guardian' is present. An alert message states: 'ALERT: Insufficient Academic Program participation: Students must complete 2 of the core Academic Programs to graduate'. The interface displays a table of grade levels and their respective credits. For Grade 11, the current status is '20.0 / 50.0' with a red exclamation mark icon. A yellow alert box next to this status reads: 'ALERT: Grade 11 does not have enough credits planned.' Below the table, there are input fields for '7005 Human Geography - 5.0' and a search bar labeled 'Type to search or select courses'.

Grade Level Alerts

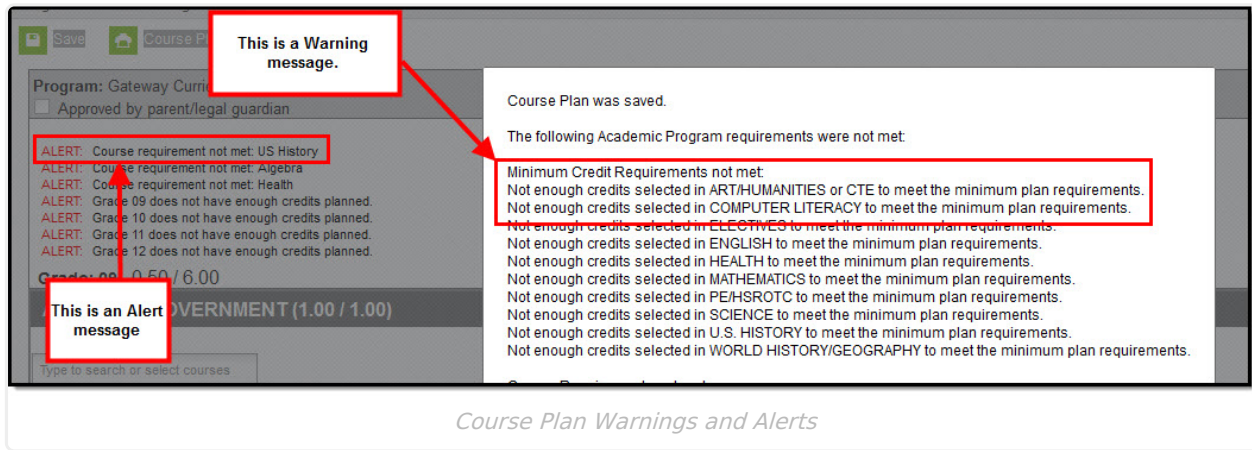
Course requirements for academic programs are considered not met when the student does not meet the Minimum Credits and the Minimum GPA Value.

- If a student has enough Earned Credits on their transcript, and exceeds the Minimum GPA to satisfy the Academic Program Course Requirement, the Alert does not display.
- If a student has enough Planned Credits to satisfy the Academic Program Course Requirement, the Alert does not display.
- If a student has a combination of Earned, Planned and/or In-Progress credits to satisfy the Academic Program Course Requirement, the Alert does not display (assuming the Minimum GPA has been met on Earned courses).
- Any planned courses assume the student meets the Minimum GPA per Course to satisfy the Academic Program Course Requirement.

Certain [Portal Display Options](#) apply here that can be turned on or off to show these rules.

- When the **Enforce All Rules** option is marked as part of the Academic Planner option, students can only save their academic plan if it meets ALL requirements and planning rules that have been established.
- When the **Enforce All Rules** options is NOT marked, students can save their plan without

meeting all requirements, but all planning rules must still be met. Warning messages from failed requirements and failed planning rules display so users can see the issues but still save the entry.



Credit Type Assignment and Display of Alerts

There may be several alerts for a course plan, and they display in multiple locations - (1) at the beginning of the course plan above the Grade/Credit header, and (2) within a Credit type. The number of alerts at the beginning of the course plan can be reduced by adding a Credit Type to the Course Requirements when setting up Graduation and CTE programs.

Assigning Credit Types to Course Requirements gives you more working space on the Course Plan, and provides more information for students when they are planning courses as to what they still need to plan.

When no Display Alert location is selected for Program Criteria, the alert appears at the top of the student's Course Plan.

Academic and Graduation Programs ★

Student Information > Program Administration > Academic and Graduation Programs

Edit Graduation Program | HS Graduation - High School Credit

Last Modified: Administrator, Demo 9/24/25, 2:19 PM

Program Details | Credit Requirements | **Program Criteria** | Course Plan Template

Saved

Requirements | Students are required to take Speech & Drama 3950 or Public Speaking 3900 as part of their English requirement.

Criteria Description: (Required)
Students are required to take Speech & Drama 3950 or Public Speaking 3900 as part of their English requirement.

Logical Expression: (Required)
1

Display Alert:

Display Order: 1

Allowed symbols: Requirement Numbers, "AND", "OR", and "("
Example Syntax: 1 AND (2 OR 3) AND 4 AND (5 OR 6)

1 | Course Requirement

Transcript/Course Number(s): 3950, 3900

State Code(s):

Minimum Credits: (Required) 0.500

Minimum GPA: 1.0000

Evaluate Credits From: High School Credit - Credit Group

Scheduling Priority: ☐ Recommended: ☐

Limit to Credit Type:

Suggested Grade:

Preview Course List

Academic Plan

Program: HS Graduation (Graduation) Counselor:

Approved by parent/legal guardian

ALERT: Compound Requirement not met: Biology and End of Course assessment

ALERT: Compound Requirement not met: Students are required to take Speech & Drama 3950 or Public Speaking 3900 as part of their English requirement

Grade: 09 7.00 / 6.00 Grade: 10 6.00 / 6.00 Grade: 11 6.50 / 6.00 Grade: 12 9.00 / 6.00

Business/Career (0.50 / 0.50)

0.00 / 0.50

0.50 / 0.00

0.00 / 0.00

0.50 / 0.00

0.50 credit overflow to Elective

English/Language Arts (4.00 / 4.00)

1.00 / 1.00

1.00 / 1.00

1.00 / 1.00

1.00 / 1.00

3100 English 9 - 0.50

3100 English 9 - 0.50

3200 English 10 - 1.00

3300 English 11 - 1.00

3400 English 12 - 1.00

8025 Personal Finance - 0.50

8525 Intro to Entrepreneurship - 0.50

Display Alert - Null

When a Credit Type is selected in the Display Alert field for Program Criteria, the alert displays under that credit type in the student's Course Plan.

Academic and Graduation Programs ★

Student Information > Program Administration > Academic and Graduation Programs

Edit Graduation Program | HS Graduation - High School Credit

Last Modified: Administrator, Demo 9/24/25, 2:19 PM

Program Details | Credit Requirements | **Program Criteria** | Course Plan Template

Requirements | Students are required to take Speech & Drama 3950 or Public Speaking 3900 as part of their English requirement.

Criteria Description: (Required)
Students are required to take Speech & Drama 3950 or Public Speaking 3900 as part of their English requirement.

Logical Expression: (Required)
1

Display Alert:
English/Language Arts

Display Order:

Allowed symbols: Requirement Numbers, "AND", "OR", and "(")"
Example Syntax: 1 AND (2 OR 3) AND 4 AND (5 OR 6)

1 | Course Requirement

Transcript/Course Number(s): 3950, 3900

State Code(s):

Minimum Credits: (Required) 0.500

Minimum GPA: 1.0000

Evaluate Credits From: High School Credit - Credit Group

Scheduling Priority: ☐ Recommended: ☐

Limit to Credit Type:

Suggested Grade:

Academic Plan

Program: HS Graduation (Graduation) Counselor:

☐ Approved by parent/legal guardian

ALERT: Compound Requirement not met: Biology and End of Course assessment

Grade: 09	Grade: 10	Grade: 11	Grade: 12
7.00 / 6.00	6.00 / 6.00	6.50 / 6.00	9.00 / 6.00
Business/Career (0.50 / 0.50)			
0.00 / 0.50	0.50 / 0.00	0.00 / 0.00	0.50 / 0.00
	8025 Personal Finance - 0.50		8025 Intro to Entrepreneurship - 0.50
0.50 credit overflow to Elective			
English/Language Arts (1.00 / 4.00)			
1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00
3100 English 9 - 0.50	3200 English 10 - 1.00	3300 English 11 - 1.00	3400 English 12 - 1.00
3100 English 9 - 0.50			

ALERT: Compound Requirement not met: Students are required to take Speech & Drama 3950 or Public Speaking 3900 as part of their English requirement.

Display Alert - Credit Type

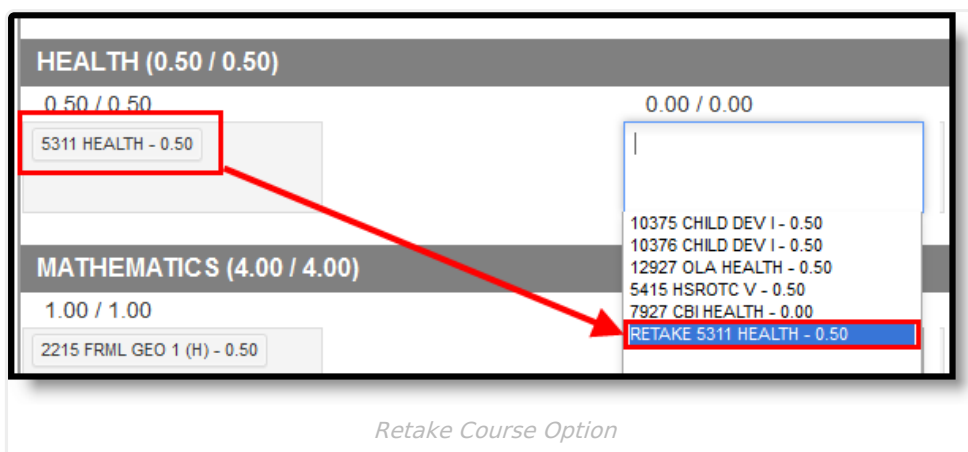
Course Display and Selection

► [Click here to expand...](#)

Courses can be selected in a Course Plan as long as the course is active. Courses that appear in the dropdown lists are pulled from the student's most future enrollment calendar, based on the primary enrollment (partial or special education enrollments are not used).

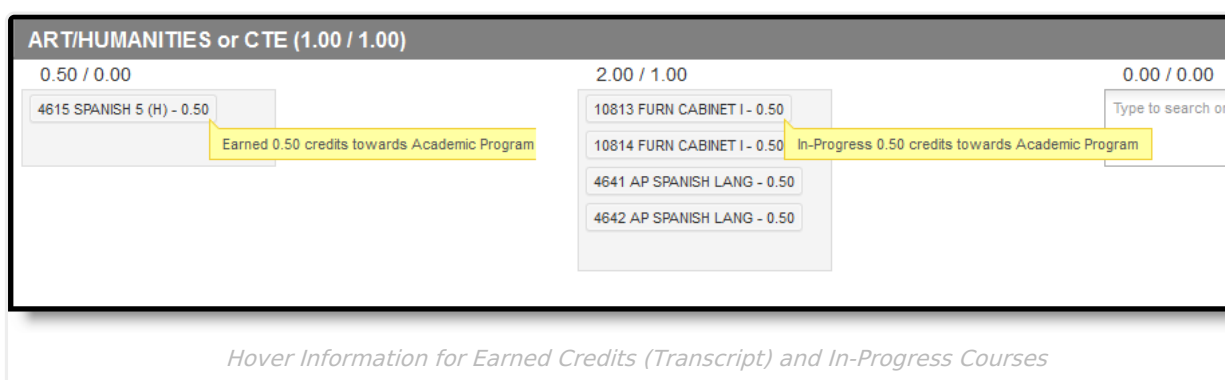
Courses that are **Recommended** from a Graduation Program Course Requirement display in bold text.

Courses that are marked as **Repeatable** on the Course Editor can be added to the Course Plan multiple times, if the student has already taken the course in a previous year. Courses that are NOT marked as Repeatable can only be added to the Course Plan by the counselor. These courses display with the word RETAKE and display in all dropdowns for that credit type. For example, if a student took a Health course in grade 9, when choosing health courses for grades 10, 11 or 12, that same course (if not marked as Repeatable) would display in the dropdown for all grade levels in the Health credit type.



Retake Course Option

Courses that have been completed (have been posted to the transcript) and in-progress courses (student is currently scheduled into) display as such when hovering over the course.



Hover Information for Earned Credits (Transcript) and In-Progress Courses

Courses that have planning rules associated with them that have not been satisfied display in gray text in the dropdown when choosing courses.

Courses that have a planning rule of Parent of/Child of display both the parent course and the child courses.

- The correct credit value for each course (parent and child) displays.
- The correct total value per credit type for each course (parent and child) displays.
- The correct total value per grade level displays for each course (parent and child).
- When a parent course is removed from the course plan, the child courses are also removed.
- A child course with a different credit type displays in the correct credit type frame and displays the correct credit amount. All child courses display as locked.
- When selecting a course with a Parent of rule, and the child course has a different credit type, the credit type displays after each course to identify which credit type they are associated.

Planned courses that do not meet planning rules assigned on the course display as a planning rule violation.

0.50 credit overflow to ELECTIVES

In this example, this alert is a Planning Rule violation because the student also needs to take the 2257 Calculus course in the same school year.

1.00 / 1.00

2215 FRML GEO 1 (H) - 0.50

2216 FRML GEO 2 (H) - 0.50

1.00 / 1.00

2011 EARLY COLLEGE MATH 096 - 0.50

2258 AP CALCULUS BC - 0.50

0.0 credit from grade 08 course 2201 CBE ALGEBRA 1 S1
0.50 credit overflow from SCIENCE

ALERT: 2258 AP CALCULUS BC - 0.50: Must take 2257 AP Calculus BC and 2258 AP Calculus BC in the same school year

ALERT: Course requirement not met: Algebra

PE/HSROTC (1.50 / 2.00)

Planning Rule Violation

If a student has not taken or planned a required course tied to a course requirement, an alert displays.

Grade: 09 5.50 / 6.00 Grade: 10 3.00 / 6.00 Grade: 11 6.25 / 6.00 Grade: 12 4.50 / 4.50

MATHEMATICS (4.00 / 4.00)

1.00 / 1.00

2215 FRML GEO 1 (H) - 0.50

2216 FRML GEO 2 (H) - 0.50

0.50 / 1.00

2227 ALG 2 STEM S1 (H) - 0.50

1.00 / 1.00

2231 TRIGONOMETRY (H) - 0.50

2232 PRE-CALCULUS (H) - 0.50

1.00 / 1.00

2011 EARLY COLLEGE MATH 096 - 0.50

2258 AP CALCULUS BC - 0.50

0.0 credit from grade 08 course 2201 CBE ALGEBRA 1 S1
0.50 credit overflow from SCIENCE

ALERT: 2258 AP CALCULUS BC - 0.50: Must take 2257 AP Calculus BC and 2258 AP Calculus BC in the same school year

ALERT: Course requirement not met: Algebra

Algebra has not been taken by the student, thus the course requirement alert displays indicating this.

Course Requirements Violation

Credit Display

► [Click here to expand...](#)

Existing credits applied to high school courses (those from middle school or transferred credit) display in the credit type section to which they apply. Only high school credits display, as long as the course has been successfully completed and credit has been earned.

In-progress courses also fulfill planning rules.

Any credit assigned to the credit type that is considered overflow displays as well.

Grade: 09	5.50 / 6.00	Grade: 10	3.00 / 6.00	Grade: 11	6.25 / 6.00
0.50 credit overflow to ELECTIVES					
ELECTIVES (4.25 / 4.50)					
1.00 / 1.00		0.00 / 1.00		0.25 / 1.00	
4613 SPANISH 3 - 0.50 4614 SPANISH 4 - 0.50				3219 CHEM LAB (H) - 0.25	
0.5 credit from grade 08 course 4611 CBE SPANISH 1 0.5 credit from grade 08 course 4612 CBE SPANISH 2 2.00 credit overflow from ART/HUMANITIES or CTE 0.50 credit overflow from COMPUTER LITERACY 0.50 credit overflow from SCIENCE					
ALERT: Not enough credits selected in ELECTIVES to meet the minimum plan requirements.					
ENGLISH (4.00 / 4.00)					

Display of Previously Received Credits

{snippet.Expand_End}}

Course Planning Rules

► [Click here to expand...](#)

Course Plans rely heavily on criteria that have been previously established, like credit groups and credit types, academic programs and their requirements. The [Course Planning Rules](#) also play a large part in course planning and affect the selection of courses and where those courses can be placed on a student's course plan. When planning rules are not met when the course plan is saved, an alert displays.

Middle school courses that are included in a course planning rule fulfill a prerequisite or equivalent planning rule at the high school.

Save	Course Plan Report
Program: Gateway Curriculum (H) <input type="checkbox"/> Approved by parent/legal guardian	
ALERT: Grade 12 does not have enough credits planned.	
Grade: 09 5.50 / 6.00 5311 HEALTH - 0.50	
MATHEMATICS (4.00 / 4.00)	
1.00 / 1.00	
2215 FRML GEO 1 (H) - 0.50	
2216 FRML GEO 2 (H) - 0.50	
0.0 credit from grade 08 course 2201 0.50 credit overflow from SCIENCE	
Course Plan was saved. The student will not be able to save plan modifications while the following course planning rule violations exist: Course planning rules not met: 2258 AP CALCULUS BC - 0.50: Must take 2257 AP Calculus BC and 2258 AP Calculus BC in the same school year The following Academic Program requirements were not met: Minimum Credit Requirements not met: Not enough credits selected in AMERICAN GOVERNMENT to meet the minimum plan requirements. Not enough credits selected in ELECTIVES to meet the minimum plan requirements. Not enough credits selected in ENGLISH to meet the minimum plan requirements. Not enough credits selected in PE/HSROTC to meet the minimum plan requirements. Course Requirements not met: Course requirement not met: Algebra Course requirement not met: AMERICAN GOVERNMENT Grade level Credit Requirements not met: Grade 12 does not have enough credits planned.	
OK	

Planning Rules and Course Plan Alerts

Course Planning Rules - Impact On Course Plan

The following table provides details on how the planning rules interact with the Course Plan.

Planning Rule	Course Display	Catalog Search Display	Alerts, Warnings and Errors
Prerequisite	A course displays in red when a student selects a course that has a prerequisite rule but has not previously taken that prerequisite course or has not planned the prerequisite course.	<p>If the prerequisite was met, the course cannot be selected for the same year in which the prerequisite course was taken. But the course can be selected in other years.</p> <p>Both courses remain in the course catalog search results.</p> <p>If the prerequisite was not met, the course cannot be selected and all buttons display in gray (inactive).</p>	<p>If a course is missing its prerequisite(s) on the course plan, the user will get an error when attempting to save.</p> <p>If a student takes the Prerequisite course(s) but does not meet or exceed the credit value to meet the requirement, an alert displays. Note that when the Prerequisite Planning Rule uses Parent/Child courses, the rule should only include the Parent course and its credits, not the Parent and Child and the sum of their credit.</p> <p>If a student takes the Prerequisite course(s) but does not meet or exceed the Min GPA Value to meet the requirement, an alert displays.</p>

Planning Rule	Course Display	Catalog Search Display	Alerts, Warnings and Errors
Equivalent	Courses display in red if the user selects more than one course listed as an equivalent.	<p>A student can only take one course in the equivalent rule.</p> <p>A counselor can select the course and the other course(s) will show in gray.</p> <p>If the course and one of its equivalents has already been taken or planned, the course cannot be selected.</p>	N/A
Concurrent	<p>Courses display in red if the student hasn't selected a course that meets the concurrent rule.</p> <p>All course numbers entered into the Transcript/Course Number field must be taken in a single year.</p> <p>If a credit value is entered, the student must meet that credit amount AND plan each course entered in the Transcript/Course Number field.</p>	<p>If a concurrent course is searched but its counterpart has not been requested, the course can be selected.</p> <p>If a concurrent course is searched and its counterpart has been requested, the course can be selected.</p>	<p>If both courses have not been selected in the same year, an alert message displays.</p> <p>If only one of the courses has been selected, an alert message displays.</p> <p>Failure to meet or exceed the credit minimum requirement triggers an Alert message.</p>

Planning Rule	Course Display	Catalog Search Display	Alerts, Warnings and Errors
Prerequisite and Concurrent	A course that is selected on the student's course plan and has a prerequisite or concurrent rule will display in RED on a student's course plan screen if they haven't taken or planned to take the course(s) that meet the prerequisite or concurrent rule.	<p>If a prerequisite or concurrent course is not in the course plan, user can search and select the course.</p> <p>If a prerequisite or concurrent course is in the course plan, any remaining prerequisite or concurrent course can be added in any year in the course plan.</p>	<p>An alert message displays if a course is selected and the user has not selected the other course in a previous year or in the same school year.</p> <p>Failure to meet the minimum credit requirement triggers an alert message. The student must meet or exceed this credit value on their transcript to meet the requirement.</p> <p>Failure to meet or exceed the minimum GPA requirement triggers an alert message. The student must meet or exceed this value to be considered as on-track.</p>
Parent Of	<p>Only the Parent Course is available for selection in the Course Plan. The Parent Course credit is a total of all the courses included in the parent/child setup.</p> <p>If there is credit overflow, it displays the total amount of credits as a sum of the parent child courses.</p>	If the parent course is already on the course plan, it displays in gray.	N/A
Child Of	Courses marked as Child Of are not available for selection in the Course Plan.	N/A	N/A