



Matriculation Plan Advisor Training Guide

Important information and common student questions regarding the MAT Plan process:

- If a student fails to assign a course to a particular term, the course(s) will be displayed as a course planned **for Fall 2020**. If this happens, the student should be instructed to assign the course to the proper semester and then resubmit the MAT Plan.
- All **variable credit courses are defaulted to one credit** in the system. Therefore, in order to accurately plan a variable credit course, the student must add the course to his/her Planner multiple times dependent upon the credits required by the program/specialty.
- Students should only input courses into the Planner in which **they have not previously enrolled, or registered**. This action duplicates the information in the advisement what-if report.
- Students should refer to the **Master Course Listing on the advising site** to determine the semester and mode that courses are offered.
- **Dual major and BSN-DNP students may have two advisors assigned**. The primary advisor will have access to approve the plan while the secondary advisor will have the ability to view. BSN-DNP students will input their full academic plan, and the MSN advisor will approve the full plan with the understanding that the agreement only extends to their specialty; the DNP portion of the plan will be approved when the student transitions into that program.
- Reports regarding student status in completing the MAT Plan will be available in STORM
- Elective credit courses, one-credit courses, and the Master Course listing are available on the new advising website.
- The sample matriculation plans are designed to assist primarily new students in completing the MAT Plan, however it may be helpful to current students since it includes pre-requisite information.
- New student **transfer credit work** will not show until the student has earned at least six DUSON credits. This process for awarding and evaluating transfer credit is managed by the Duke University Registrar's Office. New student should complete their initial MAT Plan assuming the transfer credit will be approved.

These students will show on the advisement and deviation report as not having planned/satisfied all of the required courses. If this is the only outstanding item, the advisor can disregard this notation and approve the plan as usual. However, the advisor should revisit the plan prior to the start of the next semester to ensure that the transfer of credit was processed. If not, the advisor should request the student to submit an updated plan.

- The Planner will show that new MSN, and all current students are eligible to register for courses regardless of their MAT Plan submission status through the Fall 2011 registration period. However, the system will default all students to ineligible to register starting with the Spring 2012 registration period. At that time advisors will be required to lift the hold (by clicking eligible to enroll) for all advisees prior to course registration.

MAT Plan Step by Step Instructions for Advisors

Log on to PeopleSoft using your NetID and Password



Duke University NetID Services

Please identify yourself to NetID service handleservice at host

Please enter your NetID and password:

NetID:

Password:

Don't know what a NetID is? Not sure if you have one? [Find out.](#)

Forgot your password? [Click here.](#)



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Menu

Search:

- ▷ Duke Self Service
- ▷ Self Service
- ▷ Set Up SACR
- ▷ Navigation and User Guides
- ▷ PeopleTools
- Public Schedule/Catalog View
- **STORM**
- Student Records
- User Defaults

Select STORM from the menu



Main Menu >

STORM

Items found in the old STORM

Advisor Center Access advisees assigned to you. View academic information, class schedules, book bags, grades and advisement reports. Set "eligible to enroll" flag for your students.	Simple Class Search Browse the class schedule by term. Classes offered in any given term are listed in subject order.	User Defaults User Defaults allows you set parameters such as term values, programs and plans on various pages were the default value is used (like Class Search).
Browse Course Catalog Browse the Course Catalog. Courses listed here are curriculum committee approved courses which may or may not be scheduled in any given term.		

Select Advisor Center

Scroll through the list of your advisees until you find the student you want.
Click on "View Student Details." This will take you to your advisee's main page.

Primary Plan	Exp Grad Term
Acute Care-ANP-Masters	2012 SumrF



ID 1974262

Name Cromwell,Douglas Carl
douglas.cromwell@duke.edu

Notify
[View Student Details](#)

Career	Program	Term	Eligible to Enroll
Nursing	R-MSN	2011 Spring	<input type="checkbox"/>

Primary Plan	Exp Grad Term
Acute Care-ANP-Masters	2013 Fall

Select "Advisement What-If" from the drop down menu.
 Click on the round icon next to the drop down.

Academics

[My Class Schedule](#)

[Book Bag](#)

[My Planner](#)

✔ Enrolled


Advisement What-If

>>

2011 Spring Term Schedule		
Class	Schedule	De
NURSING 307-02	Room: TBA	RE: ME
LEC (4459)		
NURSING 300		

This will take you to the "Advisee What-If Report Selection" screen. By following the instructions in the paragraph under the student's name, you can view the What-If Report in two different ways:

1. Click on the green box to see a PDF that can be printed.



Expand (Ctrl+Y) Menu

Advisor Center

Search

my advisees

student center

grades

academic history

test scores

test/transfer credit

gen

Advisee What-If Report Selection

Douglas Cromwell

If your advisee has completed a What-if advising report, you will see a date and a button below. To view the report on-line, select the date link; to print the report, select the "view Report as PDF" button.

View a Saved What-If Report	
Requested on	12/08/2010 <input style="background-color: #90EE90; border: 1px solid #ccc;" type="button" value="VIEW REPORT AS PDF"/>

The PDF version of the Academic Advisement What-If Report looks like this. It contains the following features:

1. Complete listings of the student's matriculation plan in chronological order and by program and specialty requirements.
2. It course has a designation of planned (PL), in progress (IP), taken (EN). Transfer credits (TR), Test credits (TE) and book-bagged courses (SC) are also shown.
3. This report shows whether or not the student has **appropriately planned** his or her course of study. This can be verified by reviewing the requirements. If all have been added correctly, they will show up as "satisfied."

ACADEMIC ADVISEMENT REPORT

Name: Cromwell,Douglas Carl
 Student ID: 1974262 Print Date: 12/08/2010

What-If Report

Program
 Master of Science In Nursing Program
 Acute Care-ANP-Masters Primary

Courses: 1.00 required, 1.00 used

Term	Subject	Nbr	Course Title	Grade	Units	Type
2012 SumF	NURSING	312	RESEARCH UTILIZATION		3.00	PL

Acute Care ANP

Satisfied: Plan Requirements

Adult Nurse Practitioner Core

Satisfied: Core Courses: Nursing 330, 331, 332, 333, 334

Units: 16.00 used
 Courses: 5.00 required, 5.00 used

Term	Subject	Nbr	Course Title	Grade	Units	Type
2011 Fall	NURSING	330	SEL TOP ADV PATHOPHYSIO		3.00	PL
2011 Fall	NURSING	332	DIAG REASONPHYS ASSESS		4.00	PL
2012 Spmg	NURSING	331	CLINICAL PHARINTERVEN		3.00	PL
2012 Spmg	NURSING	333	ACUTECHRON HLTH PROB I		3.00	PL
2012 SumF	NURSING	334	ACUTECHRON HLTH PROB II		3.00	PL

Acute Care Nurse Practitioner

Satisfied: Courses In Concentration: Nursing 442, 450, 451, 458

Term	Subject	Nbr	Course Title	Grade	Units	Type
2012 Fall	NURSING	442	SEXUAL/REPRODUC HEALTH		2.00	PL
2012 Fall	NURSING	450	MGT CRIT ILL ADULT PAT I		4.00	PL
2013 Spmg	NURSING	451	MGT CRIT ILL ADULT PAT I		4.00	PL
2013 SumF	NURSING	458	NP RES: ADULT ACUTE CARE		1.00	PL

Chronological Course History

Satisfied: Chronological Course History

Term	Subject	Nbr	Course Title	Grade	Units	Type
2011 Spmg	NURSING	307	RESEARCH METHODS		3.00	IP
2011 Fall	NURSING	301	POP BASED APPR HLTH CARE		3.00	PL
2011 Fall	NURSING	307	RESEARCH METHODS		3.00	PL
2011 Fall	NURSING	330	SEL TOP ADV PATHOPHYSIO		3.00	PL
2011 Fall	NURSING	332	DIAG REASONPHYS ASSESS		4.00	PL
2012 Spmg	NURSING	303	HLTH SER PROG PLANANALY		3.00	PL
2012 Spmg	NURSING	308	APPLIED STATISTICS		2.00	PL
2012 Spmg	NURSING	331	CLINICAL PHARINTERVEN		3.00	PL
2012 Spmg	NURSING	333	ACUTECHRON HLTH PROB I		3.00	PL
2012 SumF	NURSING	312	RESEARCH UTILIZATION		3.00	PL
2012 SumF	NURSING	334	ACUTECHRON HLTH PROB II		3.00	PL
2012 Fall	NURSING	442	SEXUAL/REPRODUC HEALTH		2.00	PL
2012 Fall	NURSING	450	MGT CRIT ILL ADULT PAT I		4.00	PL
2013 Spmg	NURSING	451	MGT CRIT ILL ADULT PAT I		4.00	PL
2013 SumF	NURSING	458	NP RES: ADULT ACUTE CARE		1.00	PL
2013 SumF	NURSING	458	NP RES: ADULT ACUTE CARE		1.00	PL
2013 SumF	NURSING	458	NP RES: ADULT ACUTE CARE		1.00	PL

MSN Core Requirements

Satisfied: Core Requirements

MSN Core Requirements

Satisfied: MSN Core Requirements: NURSING 301, 303, 307, 308

Courses: 4.00 required, 5.00 used

Term	Subject	Nbr	Course Title	Grade	Units	Type
2011 Spmg	NURSING	307	RESEARCH METHODS		3.00	IP
2011 Fall	NURSING	301	POP BASED APPR HLTH CARE		3.00	PL
2011 Fall	NURSING	307	RESEARCH METHODS		3.00	PL
2012 Spmg	NURSING	303	HLTH SER PROG PLANANALY		3.00	PL
2012 Spmg	NURSING	308	APPLIED STATISTICS		2.00	PL

MSN Research Options

Satisfied: MSN Research Options: NURSING 312 or 315

EN = Taken; IP = In Progress; TR = Transfer Credit; TE = Test Credit; SC = Book Bag; PL = Planned

Click on the "Student Center" tab at the top of the screen. Select "Long Range Plan" from the drop down. Click on the icon to the right of the drop down to go to the student's long range plan.

The screenshot shows the Student Center interface for Penny Cooper. At the top, there is a yellow diamond icon with the word "TEST". Below it are navigation tabs: "Main Content", "Advisor Center", and "Search". Under "Advisor Center", there are sub-tabs: "my advisees", "student center", "grades", "academic history", "test scores", and "test/transfer". The "student center" tab is selected, showing the "Advisee Student Center" for Douglas Cromwell. His Student ID is 1974262 and Duke Unique ID is 0484367. There is a dropdown menu for "Change Advisee" with "Cromwell,Douglas Carl" selected and a "change" button. Below this is the "Academics" section, which includes links for "My Class Schedule", "Book Bag", and "My Planner". A "Long Range Plan" dropdown menu is open, showing a list of classes. The first class listed is "NURSING 307-02 LEC (4459)" with a green checkmark in the status column. The second class is "NURSING 308-02" with a yellow triangle icon in the status column. A red arrow points to the "student center" tab, and a green arrow points to the "Long Range Plan" dropdown menu.



Penny Cooper

Advisor Center				Search			
my advisees	student center	grades	academic history	test scores	test/transfer credit	general info	

Advisee Long Range Plan

Douglas Cromwell

Student ID: 1974262
 Duke Unique ID: 0484367

*Change Advisee

Planning for Study at the Duke University School Of Nursing

The process below has been developed to help you realize the greatest benefit in your pursuit of a degree at the Duke University School of Nursing. By thoughtfully completing the steps outlined, you should be able to do the following:

- Have a clear idea of the requirements you must meet in order to graduate;
- Have an understanding of the scheduling and sequencing of courses for your degree;
- Provide a formal mechanism for you and your academic advisor to review and agree upon your Matriculation Plan (MAT Plan).

Scroll down to view the table containing Tasks and Status.

Task	Status
1 Complete the Academic Interest Inventory	Incomplete
2 Review academic requirements	See Sample Matriculation Plans for your track.
3 Add courses to My Planner	No courses have been added to your Planner.
4 Generate a What-If Report/Finalized Plan	No What-If reports exists. STUDENT NOTE: You may need to go back to My Planner to complete requirements for the What-If Report.
5 Submit Matriculation Plan for advisor review	Not Submitted
6 At this point, your advisor will receive an email that you have submitted your MAT Plan for review.	If you would like to discuss the curriculum, transfer of credits, double major, etc. contact your advisor
7 Approve MAT Plan	No Approved MAT Plan STUDENT NOTE: If your MAT Plan is not approved, you will be contacted by your advisor.
8 Print approved MAT Plan	No Approved MAT Plan
9 Eligible to register for classes	✔ Yes

Click on the "Approve Final Plan of Study Agreement" hyperlink.

Advisee Long Range Plan

Plan of Study Agreement for Douglas Cromwell

I have reviewed and understand the requirements for the degree/specialty I am seeking as indicated below.

I further understand that by submitting this form I am agreeing to adhere to the matriculation plan as discussed and approved by my advisor. I acknowledge that any deviation from this plan must be approved by my advisor, prior to implementing the change in plans. While a master course listing is available showing courses typically scheduled for each semester, there is no guarantee that all courses will be offered.

Degree Master of Science in Nursing

Specialty Acute Care-ANP-Masters

Course List:

2011 Fall Term			
Course	Description	Units	Typically Offered
NURSING 301	POP BASED APPR HLTH CARE	3.00	Fall, Spring and Summer
NURSING 307	RESEARCH METHODS	3.00	Fall, Spring and Summer
NURSING 330	SEL TOP ADV PATHOPHYSIOL	3.00	Fall and/or Spring
NURSING 330	SEL TOP ADV PATHOPHYSIOL	3.00	Fall and/or Spring

2013 Summer Term - Full			
Course	Description	Units	Typically Offered
NURSING 458	NP RES: ADULT ACUTE CARE	1.00	Fall and/or Spring
NURSING 458	NP RES: ADULT ACUTE CARE	1.00	Fall and/or Spring
NURSING 458	NP RES: ADULT ACUTE CARE	1.00	Fall and/or Spring

Student Name Douglas Carl Cromwell **Student ID** 1974262 **Duke Unique ID** 0484367 **Date Submitted** 12/08/2010

Advisor Name
Penny Cooper

Reason for Submission

Initial Submission Advisor Change Student Change Leave of Absence

Features of the Plan of Study Agreement:

1. Statements that the plan of study is a student responsibility and that all deviations must be approved by advisor prior to implementing the change of plan.
2. Degree and specialty (ies) in which the student is enrolled.
3. Course list showing all course numbers, descriptions and units of credit by semester. (Note: "typically offered is under revision).
4. Student's electronic "signature" showing the student's name; IDs, and the date the plan was submitted to the advisor for review and approval. The advisor's name is also included.
5. Four reasons why a plan is being submitted.
6. Button for the advisor to approve the plan as submitted or to cancel, if the plan cannot be approved as written.

If the plan is correct as submitted by the student, select the reason for submission and then click on "approve plan."

An “Advisee Long Range Plan” page will appear with the following changes:

1. the hyperlink for Task #7 now reads: “[Print Final Plan of Study Agreement](#)”
2. the status for #7 has been updated to show the approval date of the plan.

	Task	Status
1	Complete the Academic Interest Inventory	Incomplete
2	Review academic requirements	See Sample Matriculation Plans for your track.
3	Add courses to My Planner	No courses have been added to your Planner.
4	Generate a What-If Report/Finalized Plan	No What-If reports exists. STUDENT NOTE: You may need to go back to My Planner to complete requirements for the What-If Report.
5	Submit Matriculation Plan for advisor review	Not Submitted
6	At this point, your advisor will receive an email that you have submitted your MAT Plan for review.	If you would like to discuss the curriculum, transfer of credits, double major, etc. contact your advisor
7	Approve MAT Plan	No Approved MAT Plan STUDENT NOTE: If your MAT Plan is not approved, you will be contacted by your advisor.
1	8 Print approved MAT Plan	No Approved MAT Plan
9	Eligible to register for classes	✔ Yes

Click on the “[Print Final Plan of Study Agreement](#)” hyperlink. A screen appears showing the date the Plan of Study Agreement was approved, the student’s degree and specialty and the Agreement Type. If a student submits and the advisor approves subsequent versions of the plan, they will all be listed here.

	Task	Status
1	Complete the Academic Interest Inventory	Incomplete
2	Review academic requirements	See Sample Matriculation Plans for your track.
3	Add courses to My Planner	No courses have been added to your Planner.
4	Generate a What-If Report/Finalized Plan	No What-If reports exists. STUDENT NOTE: You may need to go back to My Planner to complete requirements for the What-If Report.
5	Submit Matriculation Plan for advisor review	Not Submitted
6	At this point, your advisor will receive an email that you have submitted your MAT Plan for review.	If you would like to discuss the curriculum, transfer of credits, double major, etc. contact your advisor
7	Approve MAT Plan	No Approved MAT Plan STUDENT NOTE: If your MAT Plan is not approved, you will be contacted by your advisor.
2	8 Print approved MAT Plan	No Approved MAT Plan
9	Eligible to register for classes	✔ Yes

Penny Cooper

Advisor Center	Search					
my advisees	student center	grades	academic history	test scores	test/transfer credit	general in

Advisee Long Range Plan

Print Plan of Study Agreement for Douglas Cromwell

Click on an agreement from the list below to open a printable view (PDF).

Agreement Date	Degree	Specialty	Agreement Type
December 9, 2010 11:04 AM	Master of Science in Nursing	Acute Care-ANP-Masters	Initial Submission

[return](#)

Click on the date hyperlink. This brings up a pdf as shown below.



Advisee Planner

Plan of Study Agreement

I have reviewed and understand the requirements for the degree/specialty I am seeking as indicated below.

I further understand that by submitting this form I am agreeing to adhere to the matriculation plan as discussed and approved by my advisor. I acknowledge that any deviation from this plan must be approved by my advisor, prior to implementing the change in plans. While a master course listing is available showing courses typically scheduled for each semester, there is no guarantee that all courses will be offered.

Degree: Master of Science in Nursing

Specialty: Acute Care-ANP-Masters

Course List:

2011 Fall Term			
Course	Description	Units	Typoally Offered
NURSING 301	POP BASED APPR HLTH CARE	3.00	Fall, Spring and Summer
NURSING 307	RESEARCH METHODS	3.00	Fall, Spring and Summer
NURSING 330	SEL TOP ADV PATHOPHYSIOL	3.00	Fall and/or Spring
NURSING 332	DIAG REASON/PHYS ASSESS	4.00	Fall and/or Spring

2012 Spring Term			
Course	Description	Units	Typoally Offered
NURSING 303	HLTH SER PROG PLAN/ANALY	3.00	Fall, Spring and Summer

At the bottom of the “Plan of Study Agreement” electronic signatures for both the student and the advisor are visible, as are dates for plan submission and plan approval.



2013 Summer Term - Full			
Course	Description	Units	Typically Offered
NURSING 458	NP RES: ADULT ACUTE CARE	1.00	Fall and/or Spring
Student Name	Student ID	Duke Unique ID	Date Submitted
Douglas Carl Cromwell	1974262	0484367	12/7/2010
Advisor Name			Date Approved
Penny Cooper			12/8/2010

Print the pdf and close the page. This will take you back to the page below. Click on the “return” button.

Advisee Long Range Plan

Print Plan of Study Agreement for Douglas Cromwell

Click on an agreement from the list below to open a printable view (PDF).

Agreement Date	Degree	Specialty	Agreement Type
December 9, 2010 11:04 AM	Master of Science in Nursing	Acute Care-ANP-Masters	Initial Submission

[return](#)

You are now on the Long Range Plan Page. Scroll to the bottom and click the “Eligible to Register for Classes” hyperlink. ***Please note that the eligible to register step will be required starting with the Spring 2012 registration process. This field will be defaulted to ‘Yes, eligible to register’ prior to that time.***

Task	Status
1 View the Academic Interest Inventory	Complete on December 8, 2010
2 Review Academic Requirements	See Sample Matriculation Plans for your track.
3 Add courses to My Planner	Last updated on: December 8, 2010
4 Generate a What-If Report/Finalized Plan	Last report created on: December 8, 2010 5:48 PM STUDENT NOTE: You may need to go back to My Planner to complete requirements for the What-If Report.
5 Submit Matriculation Plan for Advisor Review	Last Submitted: December 8, 2010
6 Schedule meeting (by phone or face-to-face) with advisor to discuss final matriculation plan.	Contact Advisor to schedule a meeting to review and discuss completed Planner and final What-If Report.
7 Print Final Plan of Study Agreement	Last plan created on: December 9, 2010 STUDENT NOTE: If you want to make any changes to your matriculation plan, submit updated matriculation plan and please see your Advisor for approval.
8 Eligible to Register for Classes	✗ No

This will return you to the “My Advisees” page.
Click in the “Eligible to Enroll” box

The screenshot shows two student profiles. The top profile is for a female student with a photo. Below her photo is a table with columns: Career (Nursing), Program (R-MSN), Term (2011 Sprng), and Eligible to Enroll (checked). To the right are links for 'Add a Comment' and 'View Comments'. Below this is another table for 'Primary Plan' with columns: Primary Plan (Acute Care-ANP-Masters) and Exp Grad Term (2012 SumrF).

The bottom profile is for Douglas Cromwell, a male student with glasses and a photo. To the right of his photo is his ID (1974262), Name (Cromwell, Douglas Carl), and email (douglas.cromwell@duke.edu). There is a 'Notify' checkbox and a 'View Student Details' link. Below his photo is a table with columns: Career (Nursing), Program (R-MSN), Term (2011 Sprng), and Eligible to Enroll (checked). To the right are links for 'Add a Comment' and 'View Comments'. Below this is another table for 'Primary Plan' with columns: Primary Plan (Acute Care-ANP-Masters) and Exp Grad Term (2013 Fall). A red arrow points to the 'Eligible to Enroll' checkbox in this profile.

Click “Yes” on the confirmation question:

Set Douglas Cromwell who is in career NURS with program code R-MSN to Yes for term 2011 Sprng? (29200,54)

Yes No

The student will now be able to register for courses. You can check this by returning to the student’s main page, selecting “Long Range Plan” from the drop down and clicking on the round icon. This will take you to the student’s long range plan. Task #9 “Eligible to Register for Classes has been updated to “Yes.”

Task	Status
1 Complete the Academic Interest Inventory	Incomplete
2 Review academic requirements	See Sample Matriculation Plans for your track.
3 Add courses to My Planner	No courses have been added to your Planner.
4 Generate a What-If Report/Finalized Plan	No What-If reports exists. STUDENT NOTE: You may need to go back to My Planner to complete requirements for the What-If Report.
5 Submit Matriculation Plan for advisor review	Not Submitted
6 At this point, your advisor will receive an email that you have submitted your MAT Plan for review.	If you would like to discuss the curriculum, transfer of credits, double major, etc. contact your advisor
7 Approve MAT Plan	No Approved MAT Plan STUDENT NOTE: If your MAT Plan is not approved, you will be contacted by your advisor.
8 Print approved MAT Plan	No Approved MAT Plan
9 Eligible to register for classes	✔ Yes

You can now proceed to your next advisee and repeat the process.