How to Use the Multi-Year Planner

The Multi-Year Planner is a useful tool for keeping a student on track for graduation. The following steps show how advisors can use the Multi-Year Planner. Currently, the planner is only available for advisors, and only allows advisors to set up a plan for Fall 2016. It will roll out to students and advisors, alike, as a true multi-year planner in Fall 2016.

1. Log into CalCentral using your CalNet ID and passphrase. You arrive at the My Dashboard page.

2. Observe the Advising Resources section.

3. Click the “Multi-Year Planner” link in the Advising Resources section.
4. You are taken to the **Advisor Student Select** page, where you input a student’s UID (or you can also input Last Name and First Name).

5. Click on the **Search** button to search for the student.
6. You arrive at the Multi-Year Planner for the student in question. Key sections of the planner are:

   a. students name
   b. student’s major (If a student has more than one major, or a major and minor, a drop-list menu will appear that will contain all of his/her active academic plans. The advisor is then able to select a major or minor for which a multi-year plan needs to be developed.)
   c. student’s plan

   ![Multi-Year Planner](image)

6b. The Multi-Year Planner is being rolled out in two phases. The first phase is to support you in planning your fall 2016 schedule. The second phase will include a Multi-Year Planner that is pre-populated with your declared major or intended major and maps out the remaining requirements across multiple terms. After phase two, your Multi-Year Planner could be a useful tool for you and your advisor when planning your remaining terms at Berkeley. Please note that while future terms are shown, they are not available to populate during phase one.

6c. ![Add Course](image)

7. To add a course to the planner, click the **Add Course** button.
8. Within the **Acad Planner Catalog** window, click the drop-list arrow for **Subject** (8a), and choose a subject (8b). (You can also add a **Catalog Nbr** or text string from a **Description** of the course.)

![Acad Planner Catalog screenshot](image)

**Exact Match:** Returns **Anthropology 10** when you click the **Search** button.

**Wildcard:** Returns all **Anthropology** courses with the digits “10” in the catalog number when you click the **Search** button.
9. Next, click the **Search** button.

![Search button](image1)

10. Depending on how much you have narrowed the search results, you may see the message to the right. If so, click on the **OK** button to view the results.

![OK button](image2)

11. The next step is to select the course you want to add to the student’s planner. Scroll through the list of courses, and then click the **Select** button when you find the right course.

![Select button](image3)
12. Once you click **Select**, you are returned to the **Multi-Year Planner** window, where the course you just added is displayed.

13. You can also add enrichment activities, such as **community engagement**, internship, research, student organizations, and **study abroad**.

   To add an enrichment activity, click the **Add Enrichment** button.
14. Choose an enrichment option by clicking on its **Select** button.

15. Once you select the enrichment option, you are returned to the **Multi-Year Planner** page, where the enrichment option is now displayed.

16. Note also the **Comments** section, into which you can add comments regarding any aspect of the planner.
17. You can also lock a course or enrichment activity, by clicking on its **Lock** checkbox.

18. You can delete an enrichment activity or course by clicking on the drop-list arrow to the right and selecting **Delete**.
19. You can also change a course by clicking the Change Course link.

20. Search for the course you want to switch to, and scroll until you locate it. From there, click the Select button to choose the substitute course.

21. You are returned to the Multi-Year Planner page. In addition to being able to lock individual courses or enrichment activities, you can also lock the entire planner. To do so, drag the Lock Planner slider—which defaults to No—to the right, until it says Yes.
22. The next step is to save your actions. Click the **Save** button.

23. To return to the **Advisor Student Select** search page, click the **Planner Launch** link at the top, left of the page.
23. Multi-Year Planner

24. From here, you can search for another student's Multi-Year Planner.
25. You may also exit the **Multi-Year Planner/Advisor StudentSelect** environment by clicking the browser window’s **Close** button. Once you have done so, you will again see your CalCentral’s **My Dashboard** page.

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**Support:**

For questions or assistance, please contact SIS Project Support:

- Call **510-664-9000** (press **option 6**)
- Email: **sishelp@berkeley.edu**
- Submit a ticket: **https://shared-services-help.berkeley.edu/new_ticket/it**