Advising using Student Planning

Students will still need to have a face-to-face meeting with their advisor before being cleared to register. **Student planning will not replace advising meetings!** After being cleared, the student can make a preferred course list and register for sections for the upcoming term. Advisors can now **see** these transactions and have correspondence within student planning.

To navigate to your Advising dashboard:

Click on a topic below to learn how to use the Advising features:

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**Clearing Advisees**

Advisors will be able to clear students for registration through the advising tab. **Note: Advisors cannot clear all advisees at once; advisors must go into each advisee’s record to clear them each term.**

Each advisee will have a “Last Advising Date:” on the advising overview page. This date indicates the last time that the student was cleared to register. If you see “N/A” instead of a date, then the student has not been cleared for registration and will be blocked from making any schedule changes.
To clear students for registration, you must click on the student in the advising view to see their academic information. On the top right of the screen, you will see the “Advisement Complete” button. After meeting with the student and reviewing their plan, clicking that button will release the hold.

Viewing your Advisees
The homepage will show all your advisees.

Click on a student’s name to see his or her profile.

Course Plan Tab
The course plan tab shows:

- Planned (preferred) courses
- Registered courses
- Waitlisted Courses

For the upcoming term (e.g., advising a student for Spring 2017), think of everything as sections. The sections will be offered as displayed.

For future terms (e.g., Jan Term 2018, Spring 2018, etc.), think of everything as courses. You and the student can put these courses on a plan, but the courses are not guaranteed to be offered in a particular term.

For a term currently in progress, you can see a detailed visual of the schedule.
List view

![List view of courses for the 2016 Fall Semester]

Calendar View

![Calendar view of courses for the 2016 Fall Semester]

For the next upcoming term (e.g., Fall advising for Spring 2017), you can see a detailed view of the student’s preferred (planned) sections.

A red box around a course displays any issues that occurred with the student’s registration. The issue description is shown in the course detail on the left side.
**See “Course Plan Review” section for more information on how to review courses and how to correspond with students within student planning**

After the student’s registration time, you will see how their registration went. What courses did they get into (CS-125 example below)? Which courses are waitlisted (MA-256 example below)? Which were they unable to get into (SP-210 example below)?
You will not be able to see issues that the student received when registering.

- **MA-256-2** - Course Filled. Either add to wait list or look for an available section.
- **SP-210-1** - This course is restricted to freshmen only.
- **SP-210-1** - SP-210-1: Failed Section registration restriction rules.
- **NS-101-1** - Section is restricted to elementary education majors only
- **NS-101-1** - NS-101-1: Failed Section registration restriction rules.

i.e., you will not know if they did not have the prereq, etc.
For any future terms (e.g., Fall 2017, Spring 2018...), you can only see which courses (not sections) the student is hoping to take:

Timeline Tab – a digital 4-year plan

The student has the capability to plan 4 years in advance, and the advisor can see what the student is thinking about taking. This view can be used to visualize the student’s 4-year plan that was proposed his or her first year. The student can add and remove courses from a particular term and the advisor will be able to see these transactions and communicate with the student if necessary. More on this later.

The green bar means the term is completed. A Yellow bar means the term is in progress.
Program Evaluation Tab

This is the new and improved program evaluation for students!

The degree progress section represents:

1. The overall progress of completing their degree (geneds, upper division, and major requirements combined)
2. The completion of the 126 credit minimum requirement
3. The completion of the 32 institutional minimum credit requirement

Dark green represents progress of completed credits. Light green represents progress of registered credits. Yellow represents progress of “planned” courses.

The remaining portion of the Progress tab shows complete and incomplete requirements. The colors and symbols again represent if the requirement is completed, registered for, planned, or not started. You can see the term the course was taken and the grade received, just as you can on the current program evaluation.
A new feature for this tab is searching for courses directly from the program evaluation. This will bring up all courses that meet that specific requirement. The search button is grayed out for completed requirements.

You can search for courses that meet a certain requirement if it is not grayed out. This will take you to the Courses & Sections.

**Course Plan Review**

The student may ask for you to review his/her planned or registered courses. You will receive the following notification at the top of your page:
The yellow icon indicates which students have requested a review. The blue notification will not go away until you have reviewed the student's plan.

After reviewing the student’s courses and making any necessary approvals or denials, you have the option of writing a note for the student’s plan review. This note will be attached to the date and time of this particular plan review. **Notes are not personal and are shared with the student.**

After making any appropriate notes for the student’s plan, click the “Review Complete” button.

You will be asked if you would like to archive this course plan. This will create a document of all courses in the student’s plan, any approvals or denials, and any notes that were written about the plan.
The Plan Archive tab lists all completed Plan Reviews.

These links will open up a PDF of the plan that was reviewed and any notes that went along with it. This is totally optional, but creates a historical record of what happened during or in between advising meetings.