

STUDENT PLANNING ADVISOR INSTRUCTIONS

What is Student Planning:

- track student progress towards fulfilling degree requirements
- communicate and work with your advisees
- record and store notes from an advising session
- assist students to plan courses and build a schedule for future semesters
- approve or deny course plans submitted to you for review
- archive a record of the student's plan

To Begin

- log into the UE Portal (myue.evansville.edu)
- select UE Self-Service under the Campus Applications menu at the bottom of the page
- click on Advising
- Search for advisees by
 - selecting the student from the list *or*
 - entering the advisee's name or ID number in the search box

NOTE: Students with a request for review will appear at the top of the list with a **yellow hourglass**. Also, there is a Notification area in the upper right corner which will notify you if one or more of your advisees needs a review.

The screenshot shows the MyUE portal interface. At the top, there is a navigation bar with 'MENU', 'UNIVERSITY OF EVANSVILLE', and 'IMPACT' logos. On the right, there are user options: 'Mark', 'Sign out', 'Help', and 'Notifications'. A notification bubble in the top right corner states: 'You have one or more advisees who have requested a review.' Below the navigation bar, there are breadcrumb links: 'Home', 'Daily Work', 'Advising', and 'Advising Overview'. The main section is titled 'Who would you like to work with?' and includes a search box for 'Name or ID' and a filter for 'Student' or 'Advisor'. The search results list two students: 'Gilreath, Corey D.' and 'Aders, Amanda M.'. The 'Gilreath, Corey D.' entry has a yellow hourglass icon circled in red, indicating a review request. The 'Aders, Amanda M.' entry does not have this icon. The advisor information for both students is listed as 'Engineering Advisor', 'Mech Civ Engr Advisor', 'Mark Valenzuela', and 'Jennifer Briggs'.

What is Available?

- Course Plan – Where the advisor reviews proposed courses for a specific term. Here, you are able to “approve”, “deny”, “protect” or “unprotect” any course the student has planned
- Timeline – A semester by semester view of what the student has either taken or planned
- Progress – The degree audit integrated with registration
- Course Catalog – Enables you to search courses by subject
- Notes – Student and Advisor can make notes. This is viewable by anyone with access!
- Plan Archive – After the review is complete, plans are archived here
- Test Scores – Shows ACT, SAT and placement test scores
- Unofficial Transcript – A PDF view of the unofficial transcript

COURSE PLAN (Where the advisor reviews proposed courses for a specific term. Here, you are able to “approve”, “deny”, “protect” or “unprotect” any course the student has planned).

Using the < > buttons, you can scroll to the appropriate term.

Registered courses are not subjected to approval or denial, only planned courses.

Check the box next to the course and then select either approve, deny, protect or unprotect.

- Protect requires the course to remain planned for the semester
- Unprotect removes the protect feature

The screenshot shows the IMPACT system interface for a student's course plan. At the top, there is a navigation bar with 'Home', 'Daily Work', 'Advising', and 'Advising Overview'. Below this, a 'Back to Advisees' link and a search bar are visible. The student's profile is shown with a redacted name and ID, and an email address 'jb610@evansville.edu'. A 'Review Complete' button is present. The course plan is for 'Fall Semester 2016' and shows 'Planned: 6 Credits', 'Enrolled: 0 Credits', and 'Waitlisted: 0 Credits'. A table lists the planned courses:

Select	Approval	Course	Credits	Instructor	Time	Location
<input type="checkbox"/>		ENGL-120-01: Intro to Literature	3	Hochwender, K	TTh 8:00 AM - 9:15 AM 8/24/2016 - 12/14/2016	Evansville Campus TBD Lecture
<input type="checkbox"/>		MATH-324-01: Differential Equations	3	Washington, T	MTWTF 12:45 PM - 2:15 PM 8/24/2016 - 12/14/2016	Evansville Campus TBD Lecture

You can see the student's term in "Calendar" view, but you will not be able to approve, deny, protect or unprotect on this screen. In Calendar view, registered courses are in green, planned courses are in yellow.

The screenshot shows the 'Calendar' view of the course plan for 'Fall Semester 2016'. The 'Calendar' tab is selected, and a red circle highlights it. The calendar grid shows the following course blocks:

- ENGL-120-01: Intro to Literature**: Approved and Planned. Credits: 3. Grading: Graded. Instructor: Hochwender, K. Meeting times: TTh 8:00 AM - 9:15 AM (8/24/2016 - 12/14/2016). Seats Available: 15.
- MATH-324-01: Differential Equations**: Approved and Planned. Credits: 3. Grading: Graded. Instructor: Washington, T. Meeting times: MTWTF 12:45 PM - 2:15 PM (8/24/2016 - 12/14/2016). Seats Available: 30.

The calendar grid shows the following course blocks:

- ENGL-120-01**: Yellow blocks on Tuesday (8:00 AM - 9:15 AM) and Thursday (8:00 AM - 9:15 AM).
- MATH-324-01**: Yellow blocks on Monday (12:45 PM - 2:15 PM), Tuesday (12:45 PM - 2:15 PM), Wednesday (12:45 PM - 2:15 PM), Thursday (12:45 PM - 2:15 PM), and Friday (12:45 PM - 2:15 PM).

Timeline (A semester by semester view of what the student has either taken or planned in a list view)

NOTE: The yellow warnings indicate prerequisites that must be fulfilled.

The screenshot displays a web-based course plan interface. At the top, there is a navigation bar with tabs for 'Course Plan', 'Timeline', 'Progress', 'Course Catalog', 'Notes', 'Plan Archive', 'Test Scores', and 'Unofficial Transcript'. The 'Timeline' tab is active. Below the navigation bar, there are two buttons: 'Remove Planned Courses' and '+ Add a Term'. The main content area is divided into four columns representing different semesters: 'Fall Semester 2016', 'Spring Semester 2017', 'Fall Semester 2017', and 'Spring Semester 2018'. Each column contains a list of planned courses with their respective credit values. The 'Fall Semester 2017' and 'Spring Semester 2018' columns include yellow warning icons and text indicating prerequisites that must be fulfilled. The total planned credits for each semester are shown at the bottom of each column.

Semester	Course	Credits	Prerequisites
Fall Semester 2016	FIN-351: Fundamentals of Finance	3	
Spring Semester 2017	HE-400: Concepts of Health & Wellness	1	
Fall Semester 2017	CHEM-118: Principles of Chemistry	4	
Fall Semester 2017	CHEM-119: Principles of Chemistry	3	Take CHEM-118 - Must be taken either prior to or at the same time as this course.
Fall Semester 2017	ENGR-101: Introduction to Engineering	3	
Fall Semester 2017	MATH-310: History of Mathematics	3	
Fall Semester 2017	MUS-154: Intro to Music	3	
Spring Semester 2018	ENGR-123: Programming for Engineers	3	
Spring Semester 2018	ENGR-212: Statics	3	
Spring Semester 2018	MATH-222: Calculus II	4	
Spring Semester 2018	PHYS-210: Calculus: Physics I	4	
Spring Semester 2018	PHYS-210L: Calculus: Physics I Lab	4	Take PHYS-210L - Must be taken either prior to or at the same time as this course.

Progress (The degree audit integrated with registration) View the summary of your advisees progress towards fulfilling degree requirements

Requirements are marked:

- Green = Complete or In Progress
- Yellow = Planned
- Red = Not started

Assist a student to search for courses that fulfill degree requirements by clicking on the **search button** directly above each requirement. Here you can also view the course descriptions and any available sections to add a course to a plan.

NOTE: Planned courses are not registered courses!

BS in Accounting (1 of 1 programs) [View a New Program](#) [Load Sample Course Plan](#)

At a Glance

Cumulative GPA: 3.869 (2.000 required)
Institution GPA: 3.869 (2.000 required)
Degree: BS in Accounting
Majors: Accounting
Departments: Accounting and Business Admin
Catalog: 2015

Description
Program Notes
[Show Program Notes](#)

Progress

Program Completion must be verified by the Registrar.

Total Credits (126 of 124)

47	18	61
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Total Credits from this School (95 of 48)

16	18	61
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Requirements

Enduring Foundations General Education

Complete all of the following items. **5 of 11 Completed.** [Hide Details](#)

A. Outcome 1

Complete 3 credits from Outcome 1: Critical Reading and Thinking

Complete all of the following items. **1 of 1 Completed.** [Show Details](#)

B. Outcome 2

Complete 3 credits from Outcome 2: Engagement with Imaginative Expressions of the Human Condition

Complete all of the following items. **1 of 1 Completed.** [Show Details](#)

C. Outcome 3

Complete 3 credits from Outcome 3: Knowledge of Human History and the Historical Context of Knowledge

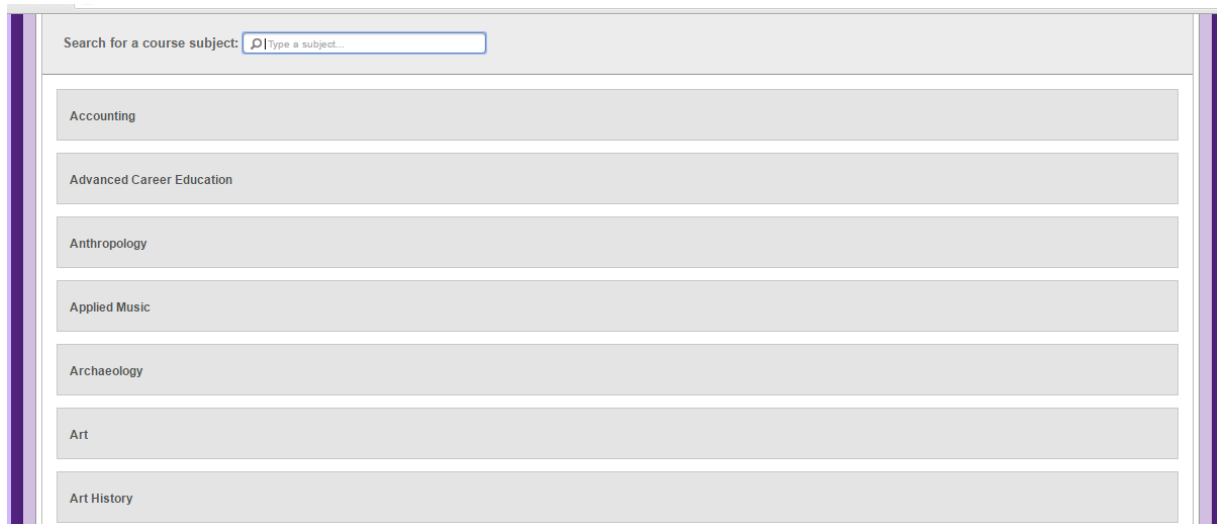
Complete all of the following items. **0 of 1 Completed.** **Fully Planned** [Hide Details](#)

Fully Planned **0 of 3 Credits Completed.** [Hide Details](#)

Status	Course	Grade	Term	Credits
Planned	HIST-111	Wild Hist to 1500	2016/S2	3

Course Catalog (Enables you to search courses by subject)

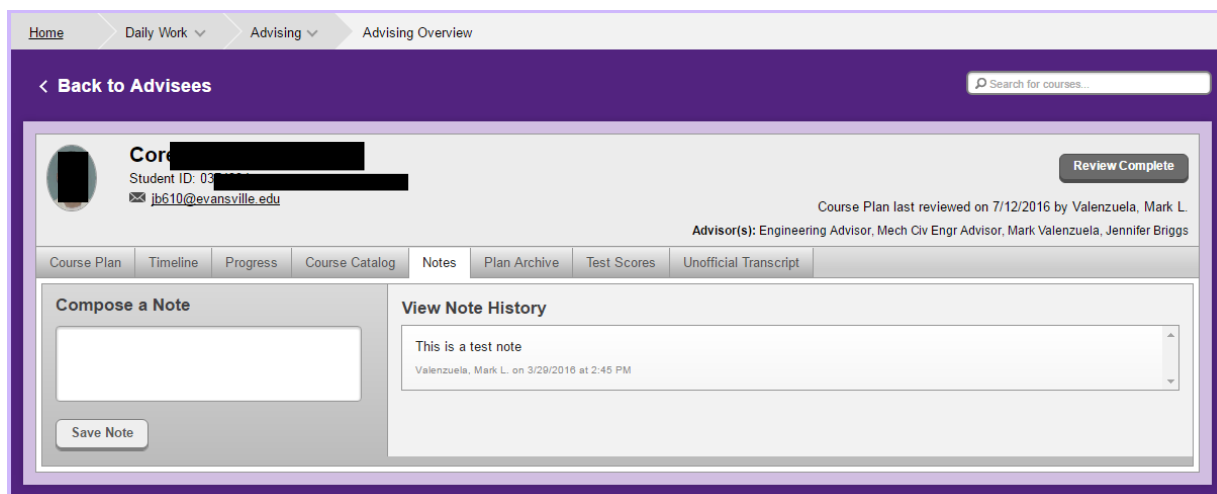
This is another option to search for courses to be planned or scheduled.



The screenshot shows a search interface for a course subject. At the top, there is a search bar with the placeholder text "Type a subject...". Below the search bar, a list of subject categories is displayed in a vertical stack, each in a light gray box. The visible subjects are: Accounting, Advanced Career Education, Anthropology, Applied Music, Archaeology, Art, and Art History.

NOTES (Student and Advisor can make notes. This is viewable by all advisors, the student and others with access to student planning. Keep this in mind when entering notes.)

Once saved, notes **cannot** be altered or deleted.



The screenshot shows a student planning interface. At the top, there is a breadcrumb trail: Home > Daily Work > Advising > Advising Overview. Below this, there is a "Back to Advisees" link and a search bar for courses. The main content area shows a student profile for "Core [redacted]" with a Student ID of "03 [redacted]" and an email address of "jb610@evansville.edu". A "Review Complete" button is visible. Below the profile, there is a navigation menu with tabs for Course Plan, Timeline, Progress, Course Catalog, Notes, Plan Archive, Test Scores, and Unofficial Transcript. The "Notes" tab is currently selected. The "Compose a Note" section has a text input field and a "Save Note" button. The "View Note History" section shows a list of notes, with one note visible: "This is a test note" by Valenzuela, Mark L. on 3/29/2016 at 2:45 PM.

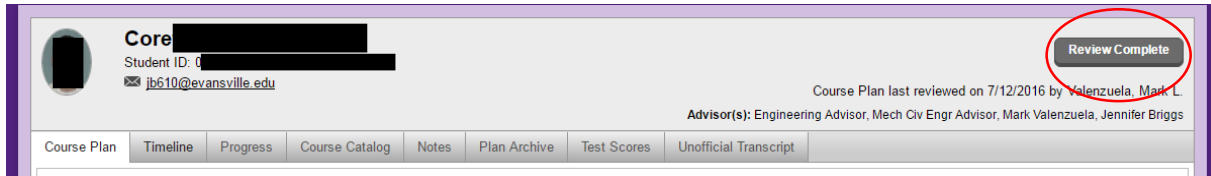
Plan Archive (After the review is complete, plans are archived here)

- Be sure to “archive” after reviewing a student’s plan.
- This will be helpful with students with multiple majors or minors or if a student changes majors – and for our 4-year guarantee.

Test Scores (shows ACT, SAT, placement and other test scores)

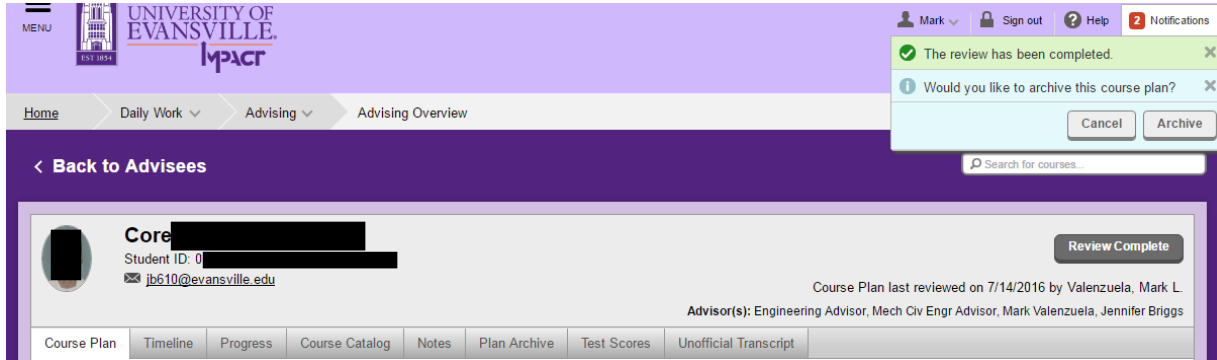
Unofficial Transcript (a PDF view of the unofficial transcript)

Review Complete – When you have finished reviewing the plan and click this button, the student gets an email indicating the plan has been reviewed. The student will also be cleared to register.



This screenshot shows a student's profile and course plan page. The student's name is Core [redacted], with a Student ID of 0 [redacted] and an email address of lb610@evansville.edu. The course plan was last reviewed on 7/12/2016 by Valenzuela, Mark L. The advisors listed are Engineering Advisor, Mech Civ Engr Advisor, Mark Valenzuela, and Jennifer Briggs. A navigation bar at the bottom includes links for Course Plan, Timeline, Progress, Course Catalog, Notes, Plan Archive, Test Scores, and Unofficial Transcript. A dark grey button labeled "Review Complete" is circled in red in the top right corner of the student profile area.

Additionally, you will then see a notification encouraging you to archive the plan.



This screenshot shows the University of Evansville advising interface. The top navigation bar includes "MENU", the university logo, and "UPACR". The breadcrumb trail is Home > Daily Work > Advising > Advising Overview. A notification box in the top right corner displays a green checkmark and the message "The review has been completed." Below this is a blue information icon and the question "Would you like to archive this course plan?" with "Cancel" and "Archive" buttons. The student profile and course plan information are visible below the notification, showing the same student as in the previous screenshot, but with the review date updated to 7/14/2016 and the advisor list including Engineering Advisor, Mech Civ Engr Advisor, Mark Valenzuela, and Jennifer Briggs. The "Review Complete" button is also present in the top right of the student profile area.

Any questions? Contact the Office of the Registrar for further help.