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
  - 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.

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

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.
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.
**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!
**Course Catalog** (Enables you to search courses by subject)

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

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**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.

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**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.

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

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