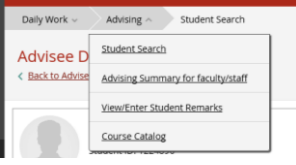**WebAdvisor to Self Service**

1. **To use this page, find the WebAdvisor function in the left column and view its equivalent in the second column.**

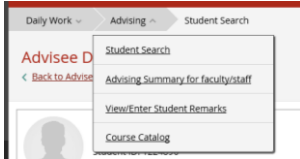2. **The notes column provides a brief description of the function in Self Service**

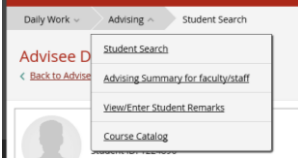| How to access your assigned advisees | | | |
|---|---|---|---|
| **WEBADVISOR** | **SELF SERVICE** | **Notes** | **Video Demo / Resources** |
| My Advisees ← Advisees Search for Sections Student educational planning Advising Summary Student Remarks -Administrative Student Remarks -Faculty Advisor | Select 'Advising" box<br><br>Advisees will automatically load.<br><br>Click on student name to access the record | 1. In WebAdvisor, the term or date range can be selected and list can be limited to only students who are actively enrolled in that term.<br>2. In Self Service, your assigned advisees will automatically load and be displayed<br>• Please note: it may take 20 seconds or more to load advisees for the first time<br>    • Advisee list will include students who have taken courses within the past year, not just those currently enrolled.<br>    • Advisee list **cannot** be limited to only those with active enrollment<br>    • Ten to Twenty advisees will load on the page. Continue to scroll down to load additional advisees<br>    • | |

| How to email your assigned advisees | | | |
|---|---|---|---|
| **WEBADVISOR** | **SELF SERVICE** | **Notes** | **Video Demo** |
| My Advisees ← Advisees Search for Sections Student educational planning Advising Summary Student Remarks -Administrative Student Remarks -Faculty Advisor | Select 'Advising" box Advisees will automatically load. | 1. To email all advisees: Once all advisees are loaded, select "Email all my Advisees" in the upper right hand corner. In some instances you may be instructed to copy the list and paste into outlook. Note: when emailing more than one student, enter all addresses into the BC (Blind Copy) field, so student emails aren't shared amongst the group. 2. To email an individual student, select the student record. Once in the record, the student email is located under the student name at the top of the record. | |
| How to search for students | | | |
| **WEBADVISOR** | **SELF SERVICE** | **Notes** | **Video Demo** |
| My Advisees Advisees ← Search for Sections Student educational planning Advising Summary Student Remarks -Administrative Student Remarks -Faculty Advisor | Select 'Advising" box Assigned Advisees will automatically load. The **Search Bar** can also be used to find student records by entering student ID or name Click on the student name to enter the record. | **Please NOTE:** Access to certain student information is based upon advisee assignments and one's role at the college. If a record does not display, you may not have access to that record. Searches may result in records of both active and non-active students. Narrow the search by the following: 1. Utilize the student ID number for the fastest search 2. Search by last name with at least the first 3 letters. 3. A large list of names may be displayed. Students who are not actively enrolled will be noted as "Undeclared". This should not be confused with a student who is actively enrolled in an undeclared program. Those students will be noted as "General Studies; Undeclared" and an advisor will be listed in the right hand column | *Self Service – Student Search* |

| Search for courses | | | |
|---|---|---|---|
| **WEBADVISOR** | **SELF SERVICE** | **Notes** | **Video Demo** |
| My Advisees<br>Advisees<br>Search for Sections ←<br>Student educational planning<br>Advising Summary<br>Student Remarks -Administrative<br>Student Remarks -Faculty Advisor | Select "Course Catalog" box   OR<br><br>While in student advising record:<br>1) select **Course Catalog** tab<br><br>2) hover over *Advising* in the top menu and select **Course Catalog** | 1. All courses and sections for past and future terms will populate in alphabetical order<br>2. Filter courses on the left.  Recommend first filter by main term and all courses for 15 week and accelerated terms will populate.  Under the "Topics" filter, shorter accelerated sub term offerings can be selected.<br>3. Under the course, select "View available sections" for specific sections offered and seats available | |

| Review Student Program Evaluation (Progress) | | | |
|---|---|---|---|
| **WEBADVISOR** | **SELF SERVICE** | **Notes** | **Video Demo** |
| My Advisees<br>Advisees<br>Search for Sections<br>Student educational planning ←<br>Advising Summary<br>Student Remarks -Administrative<br>Student Remarks -Faculty Advisor<br><br>Select:  Program Evaluation<br><br>Select: circle next to student's current program<br><br>Submit | Select "Advising" box<br><br>Select Student record<br><br>Select **Progress** tab | 1. Program evaluation will indicate what courses have been completed (green), courses that are planned (yellow) and courses that have not started (red)<br>2. Please note that all courses listed <u>may not be required</u>.  For categories where a student may choose from amongst several options, all courses will be listed.  Refer to the top of the section which will state "Take two of the following", for example.<br>3. A print icon is located in the top right side of the page. | |

## Creating or Modifying a Student's Educational Plan

| WEBADVISOR | SELF SERVICE | Notes | Video Demo/ Resources |
|---|---|---|---|
| My Advisees<br>Advisees<br>Search for Sections<br>Student educational planning ←<br>Advising Summary<br>Student Remarks -Administrative<br>Student Remarks -Faculty Advisor<br><br>Select: Add or Change Plan | Select "Advising" box<br><br>Enter student ID or name in the search bar or select student from assigned advisee list. | 1. Student Educational Planning feature is available for all assigned advisees only unless your role at the college requires access to all records.<br>2. Assigned advisees will automatically populate when the advising box is selected. Click on the advisee name to enter the record.<br>3. The search feature can also be used.<br>4. Once in the student record, the educational plan can be created, modified or approved. Refer to additional training guides for details. | Self Service-Advising Guide |

## What if a student changed their major? How would their courses apply?

| WEBADVISOR | SELF SERVICE | Notes | Video Demo |
|---|---|---|---|
| My Advisees<br>Advisees<br>Search for Sections<br>Student educational planning ←<br>Advising Summary<br>Student Remarks -Administrative<br>Student Remarks -Faculty Advisor<br><br>Select: Program Evaluation<br>Select:<br>Select: new program from the pull down menu next to "What if I changed my program of study?" | Select "Advising" box<br><br>Select Student record<br><br>Select **Progress** tab<br><br>Click on "View a New Program" and make selection | 1. New program evaluation will apply current courses taken and planned.<br>2. This new program progress can be printed by using the print icon in the upper right corner.<br>3. A message appears in the top indicating that the student is not officially enrolled in this program. A Change of Major form will need to be completed and sent to the Record's Office to officially make the change to the student record. | |

| View a student's schedule | | | |
|---|---|---|---|
| **WEBADVISOR** | **SELF SERVICE** | **Notes** | **Video Demo** |
| My Advisees<br>Advisees<br>Search for Sections<br>Student educational planning ⟵<br>Advising Summary<br>Student Remarks -Administrative<br>Student Remarks -Faculty Advisor<br><br>Select: Student Educational Planning<br>Select: View Student Schedule | Select "Advising" box<br><br>Select Student record<br><br>Record will open to "Course Plan" tab which is the schedule | 1. Schedule for most recent term will show first<br>2. Use the arrows in the header to move to previous or future terms<br>3. If course is listed as "no section selected" indicates that the student plans to take the course, but they are NOT REGISTERED for the course. When talking with advisees, please bring this to their attention as they may think they are registered for the course, but they are not.<br>4. A print icon is located in the bar above the schedule. The document will display both planned and registered courses. | |

| View a student's placement / SAT / ACT scores | | | |
|---|---|---|---|
| **WEBADVISOR** | **SELF SERVICE** | **Notes** | **Video Demo** |
| My Advisees<br>Advisees<br>Search for Sections<br>Student educational planning ⟵<br>Advising Summary<br>Student Remarks -Administrative<br>Student Remarks -Faculty Advisor<br><br>Select: Student Educational Planning<br>Select: View Student Test Summary | Select "Advising" box<br><br>Select Student record<br><br>Select **Test Scores** tab | 1. Accuplacer Reading, Writing and Math scores will be displayed<br>2. ACT and SAT scores (if received by the college) will display under "Other tests" | |

## View a student's transcript

| WEBADVISOR | SELF SERVICE | Notes | Video Demo |
|---|---|---|---|
| My Advisees<br>Advisees<br>Search for Sections<br>Student educational planning ←<br>Advising Summary<br>Student Remarks -Administrative<br>Student Remarks -Faculty Advisor<br><br>Select:  Student Educational Planning<br>Select: View Student Transcript | Select "Advising" box<br><br>Select Student record<br><br>Select **Unofficial Transcript** tab | 1. Click on the Unofficial Transcript tab.  If the student has grades on record, a hyperlink to an unofficial transcript will be available.<br>2. Click on the hyperlink and download the transcript and print as needed.<br>3. You can also access a list of the students grades by term by selecting the "Grades" tab located along the menu bar | |

## View a student's Advising Summary (Program Evaluation plus Profile Information)

| WEBADVISOR | SELF SERVICE | Notes | Video Demo |
|---|---|---|---|
| My Advisees<br>Advisees<br>Search for Sections<br>Student educational planning<br>Advising Summary ←<br>Student Remarks -Administrative<br>Student Remarks -Faculty Advisor | Select "Advising" box<br><br>Select Student record<br><br>Hover over "Advising" in top bar next to Daily Work.<br><br>Select "Advising Summary for faculty/staff"<br><br>Daily Work  Advising  Student Search<br>Advisee D<br>< Back to Advise  Student Search<br>Advising Summary for faculty/staff<br>View/Enter Student Remarks<br>Course Catalog | 1. After selecting Advising Summary for Faculty/Staff, the system will take you back to WebAdvisor.  It should automatically take you to the entry screen, but you may need to re-enter your log in.<br>2. If you must re-log in select the Advisor or Faculty tab and select "Advising Summary".<br>3. You will need to enter the student or select advisee from the pull down menu.<br>4. Student's Advising Summary will display.  The advising summary includes the student's program evaluation, contact information, financial aid status, current courses registered, assigned advisors and additional information helpful in the advising process.<br><br>Please NOTE:  Access to certain student information is based upon advisee assignments and one's role at the college. | |

9/6/2019

## Enter Student Remarks (STRK notes)

| WEBADVISOR | SELF SERVICE | Notes | Video Demo |
|---|---|---|---|
| My Advisees<br>Advisees<br>Search for Sections<br>Student educational planning<br>Advising Summary<br>Student Remarks -Administrative ←<br>Student Remarks -Faculty Advisor | Select "Advising" box<br><br>Select Student record<br><br>Hover over "Advising" in top bar next to Daily Work.<br><br>Select "View / Enter Student Remarks"<br><br>Daily Work ˅    Advising ˄    Student Search<br>Student Search<br>Advisee D<br>‹ Back to Advise    Advising Summary for faculty/staff<br>                    View/Enter Student Remarks<br>                    Course Catalog | 1. After selecting View/Enter Student Remarks, the system will take you back to WebAdvisor. It should automatically take you to the entry screen, but you may need to re-enter your log in.<br>2. If you must re-log in select the Advisor or Faculty tab and select Student Remarks – Administrative.<br>3. You will need to enter the student full name or ID and select either view or enter remarks.<br>**View remarks:** provides all previous advising notes recorded for the student<br><br>**Enter remarks:** Select role, note type and enter remarks and submit. Notes will be officially recorded in the student record. All student notes should be related to advising and the student's program. Policies and procedures for appropriate STRK (Student Remarks) notes is outlined in the Advising Resources for Staff and Faculty in Canvas<br><br>Please NOTE: The **Public Notes** tab in Self Service is <u>NOT</u> the same as student remarks. This is a note area that is shared between the student and advisor. Any notes left in this area **will** be seen by the student. | |