Daemen University
Self-Service Advisor Guide

Self-Service Overview

Self-Service is an interactive web application that enables users to access and view their individual or advisee information contained in your institution's Colleague® databases.

Self-Service Modules

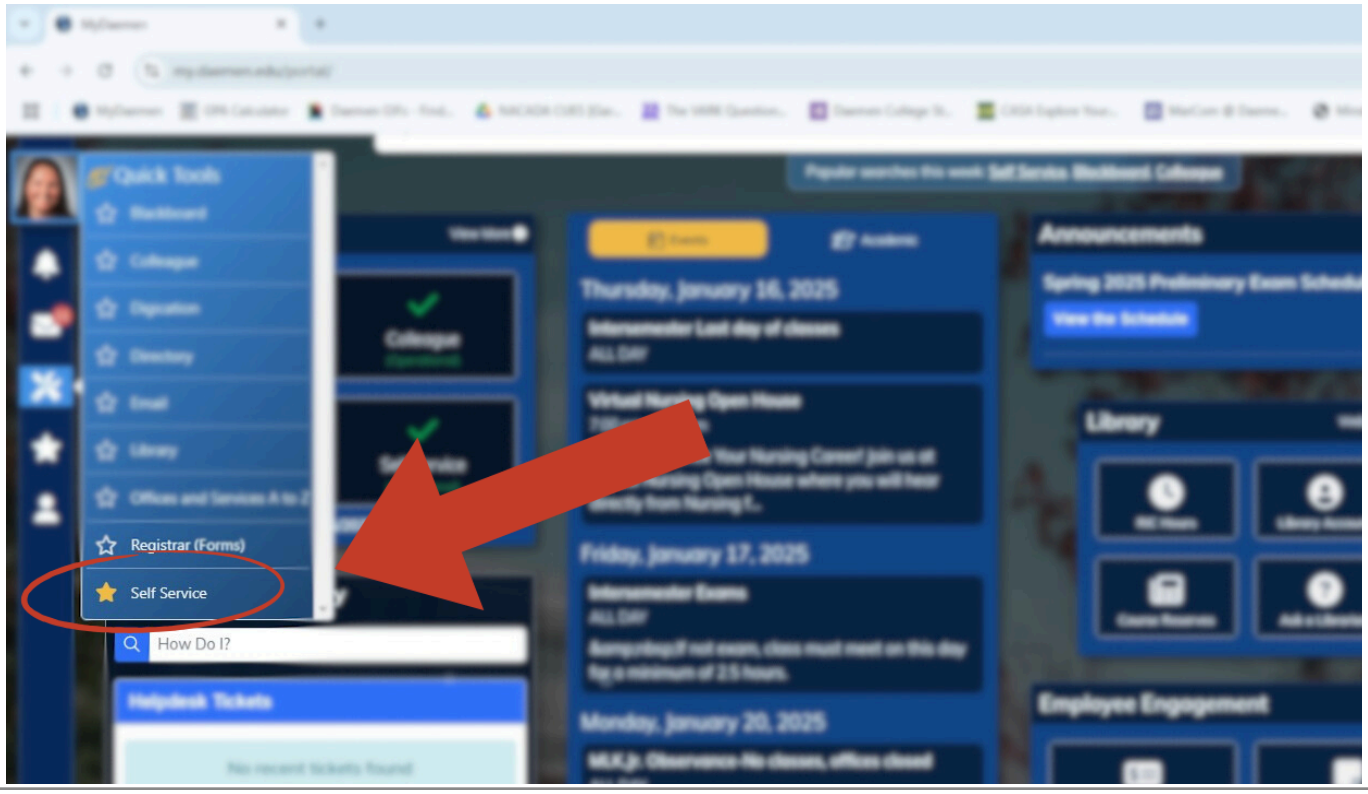
Self-service consists of several modules that allow users to perform tasks, such as advising students or applying for graduation. These modules include:

- Student Planning
- Graduation
- Student Finance
- Grades

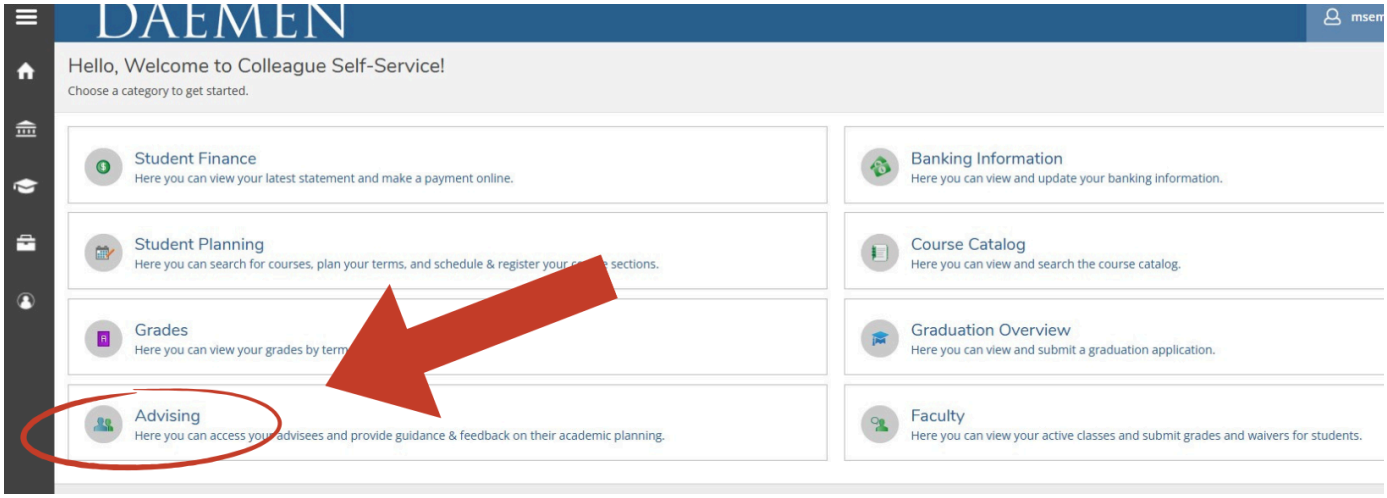
Self Service allows a student and advisor to work together to achieve the desired outcome for a selected course plan.

To Review a Student's Plan and Approve/Deny Courses

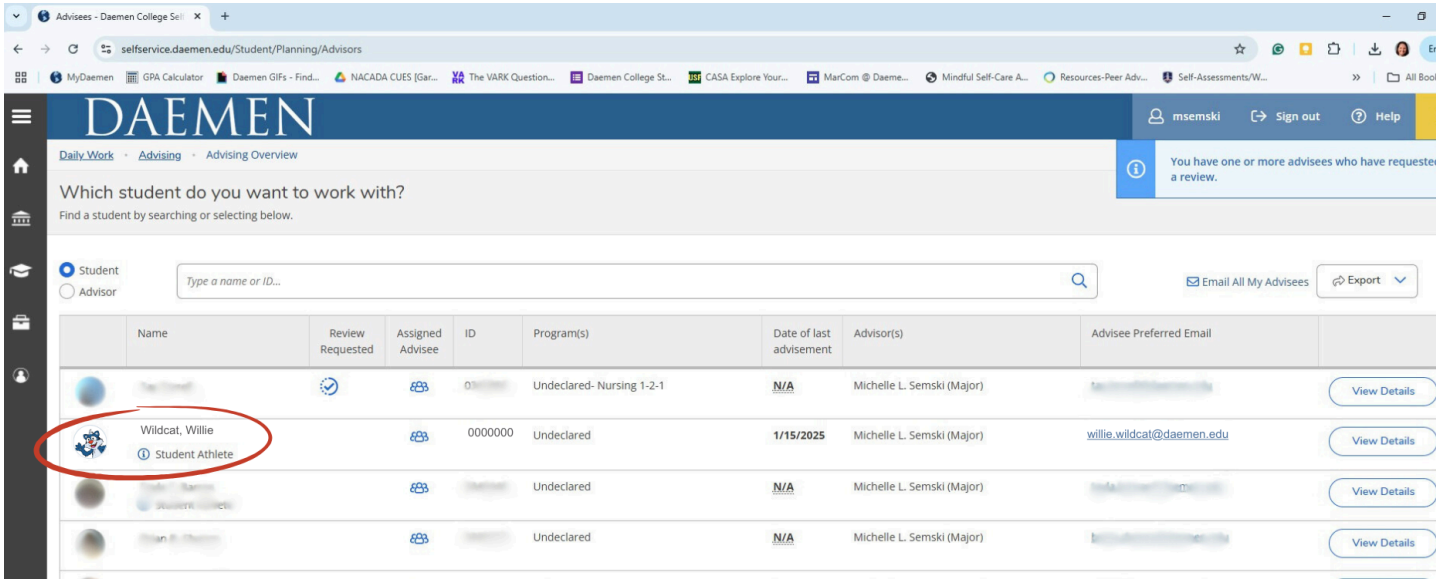
1. Log onto MyDaemen and click on Self Service from the Quick Tools menu. This link will automatically take you to the Self-Service.



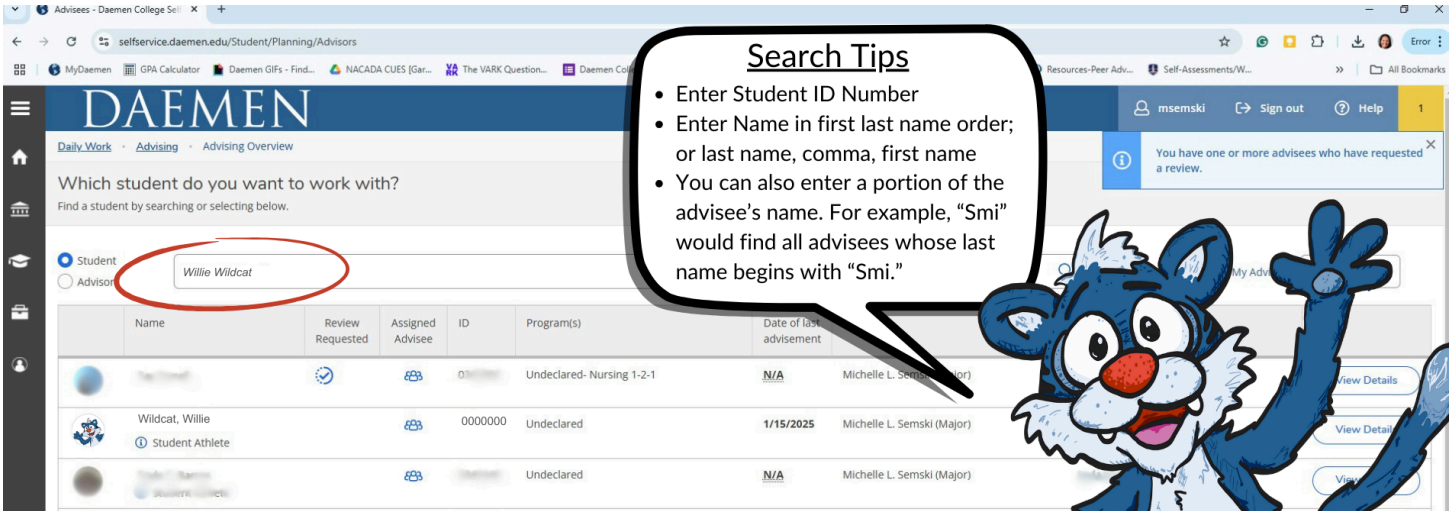
2. Select “Advising” from the menu



3. Your advisees will appear. Click "View Details" for the student you want to access.

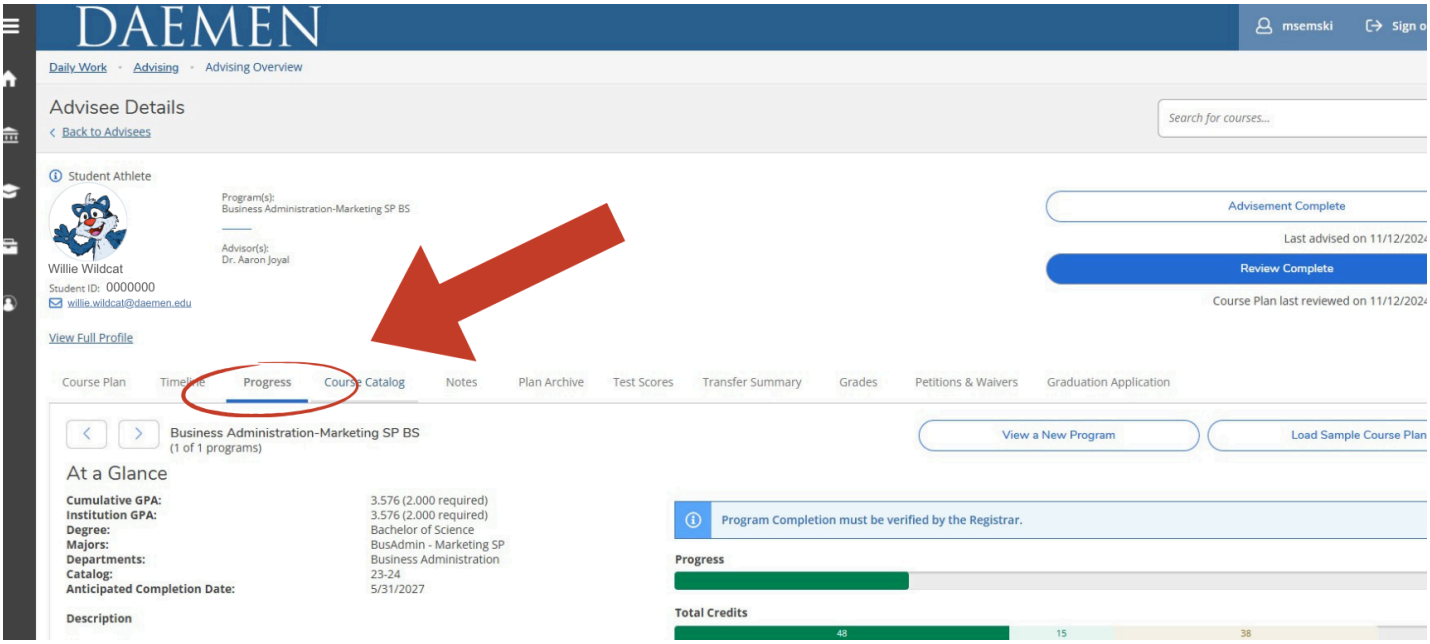


You can also use the Search box to search for a particular advisee.

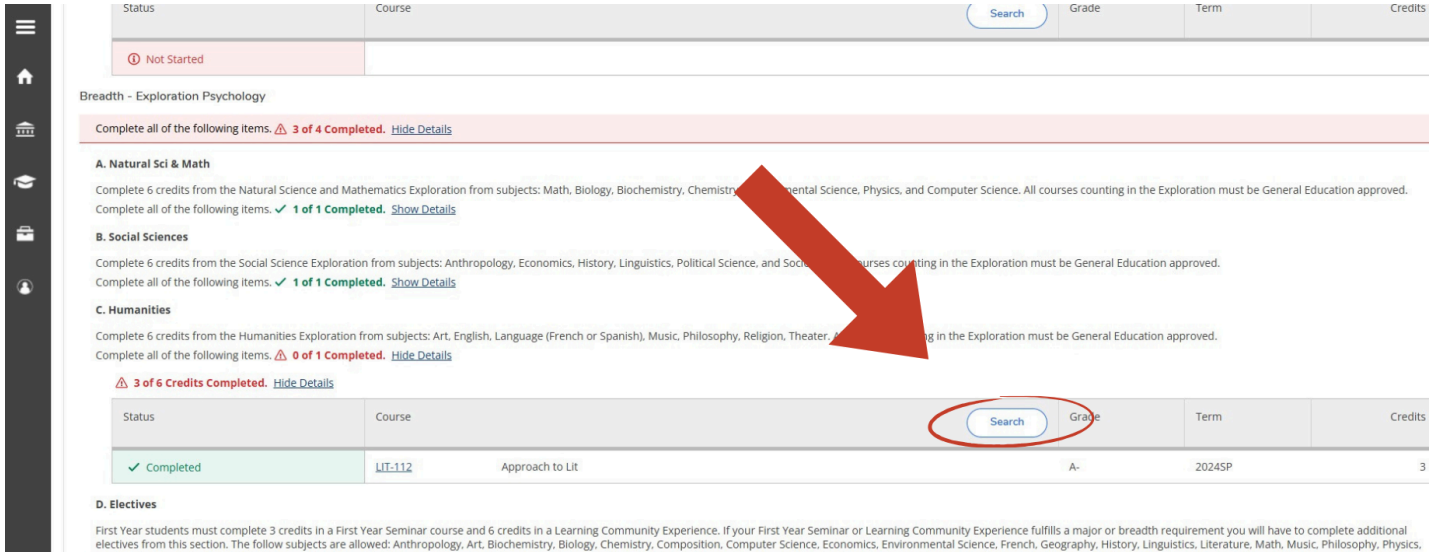


Progress

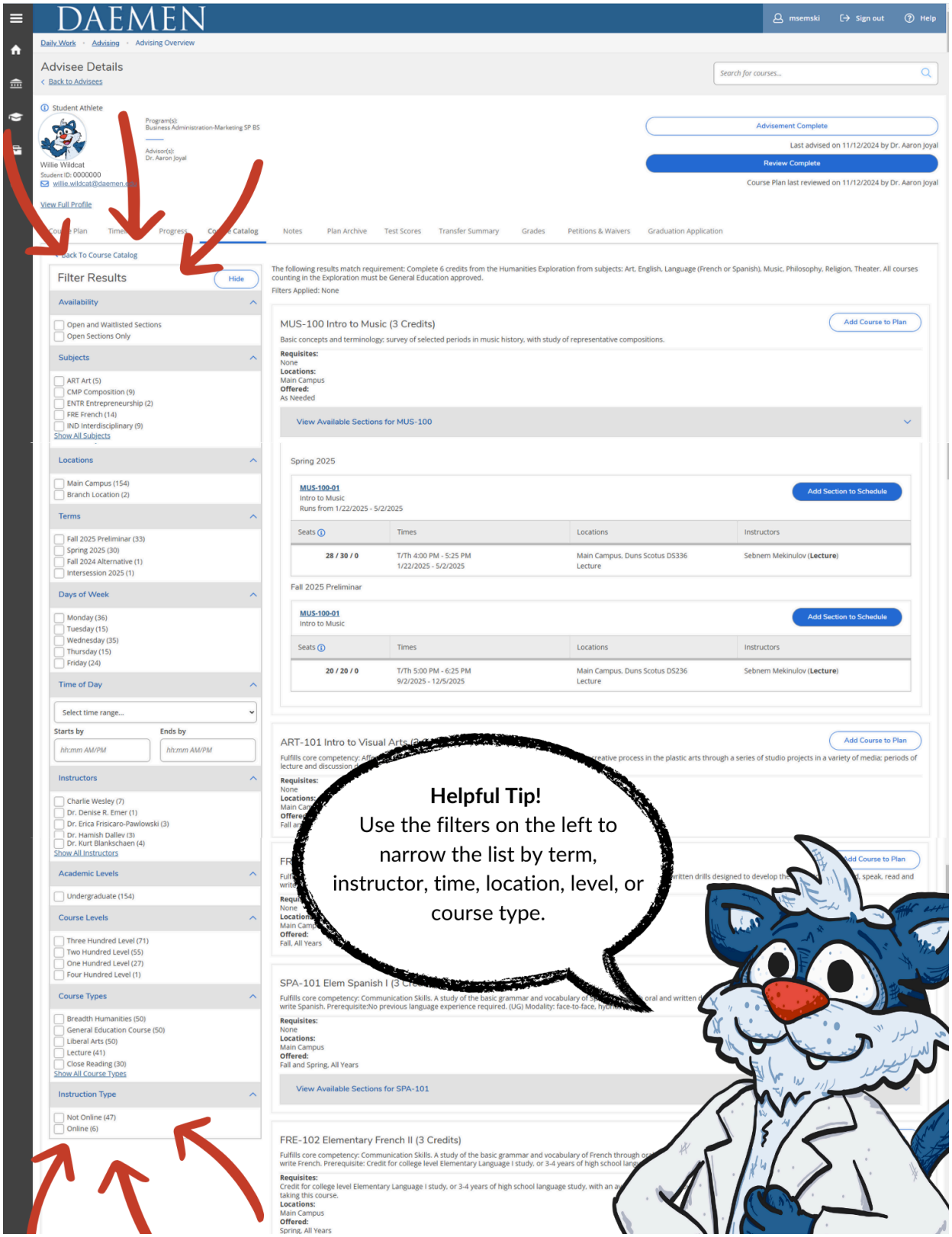
The **Progress** tab is a student's degree audit and outlines their degree requirements. Specific student information will be displayed at the top.



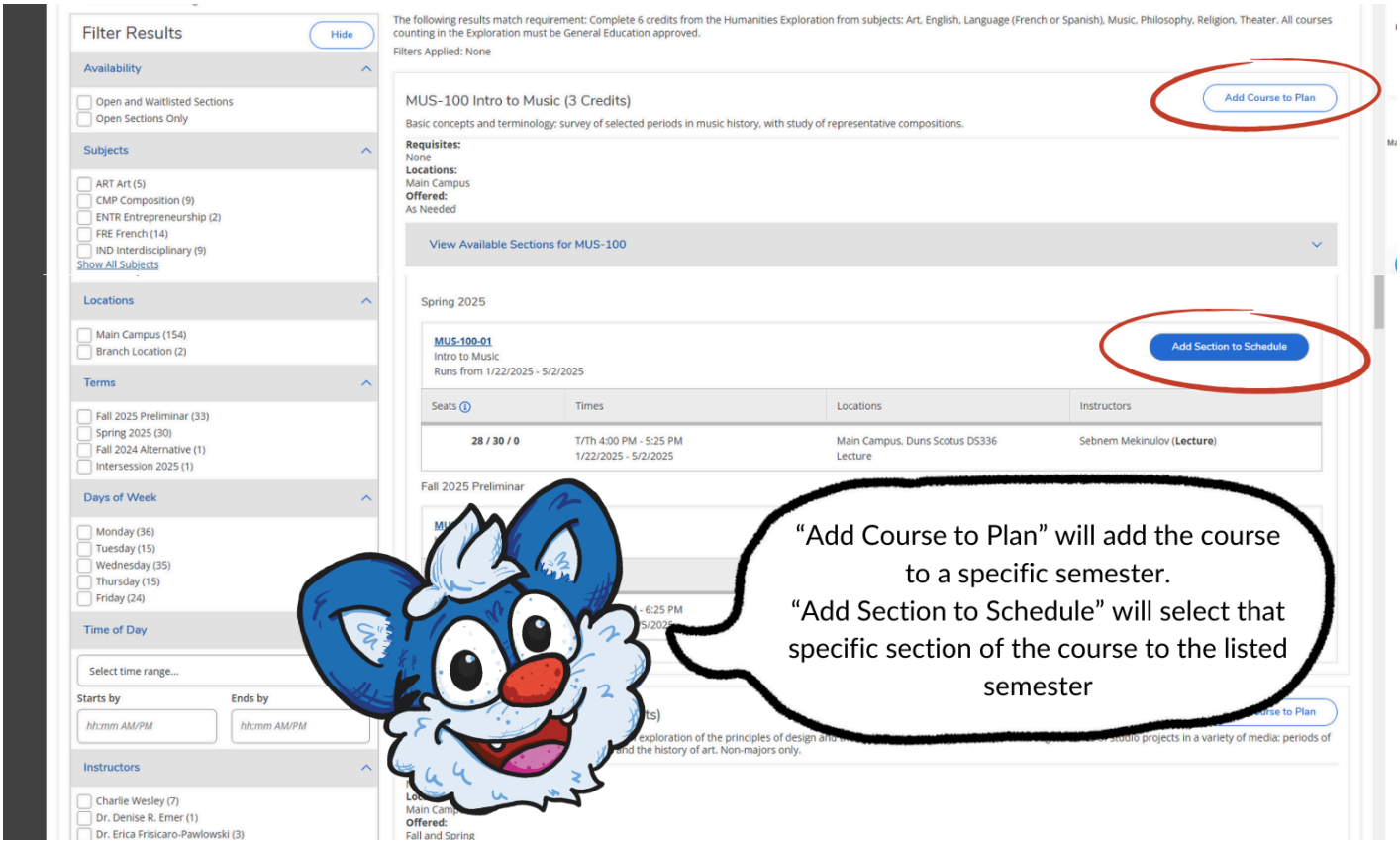
This **Progress** tab is an interactive degree audit. Click the Search box to see a list of courses that meet that requirement.



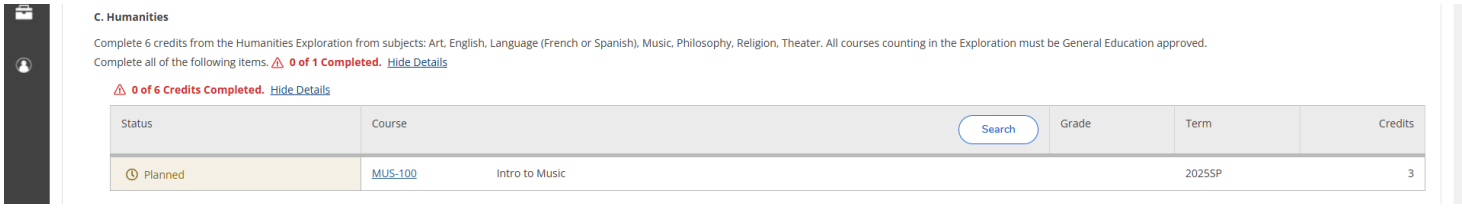
This search feature will take you to the **Course Catalog** and lists the courses that meet the requirements. From here, you see all the active courses that meet your search criteria. Use the filters on the left to filter the list to sections available by choosing a term, instructor, time of day, location, and/or course types.



You can add a course to the Student's plan or schedule.



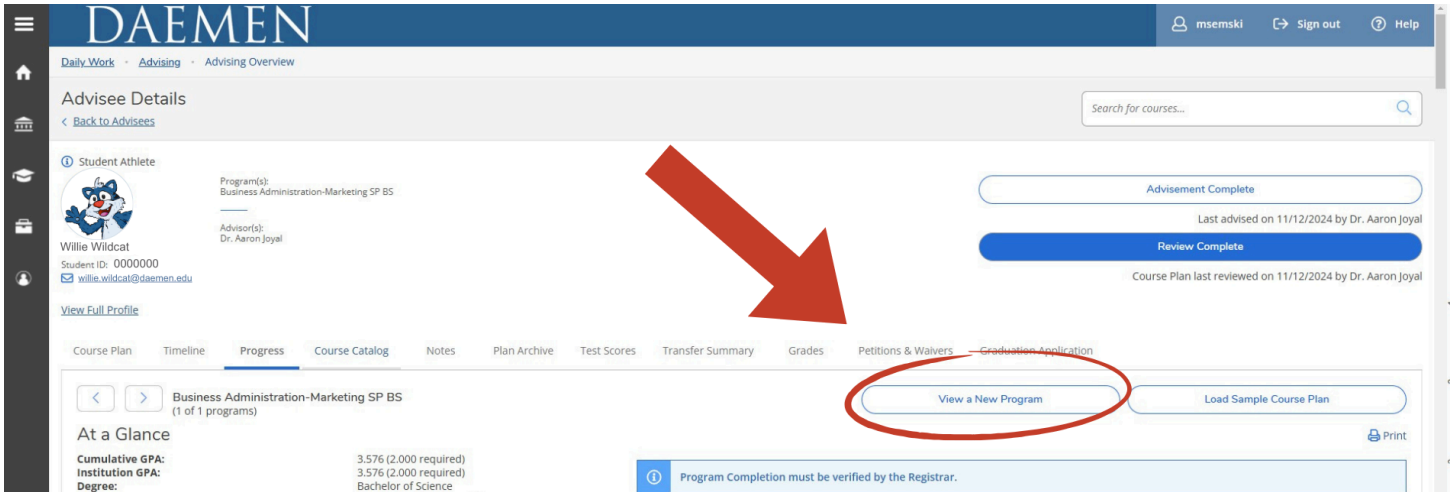
The course will now be "Planned" on the student's <u>Progress.</u>



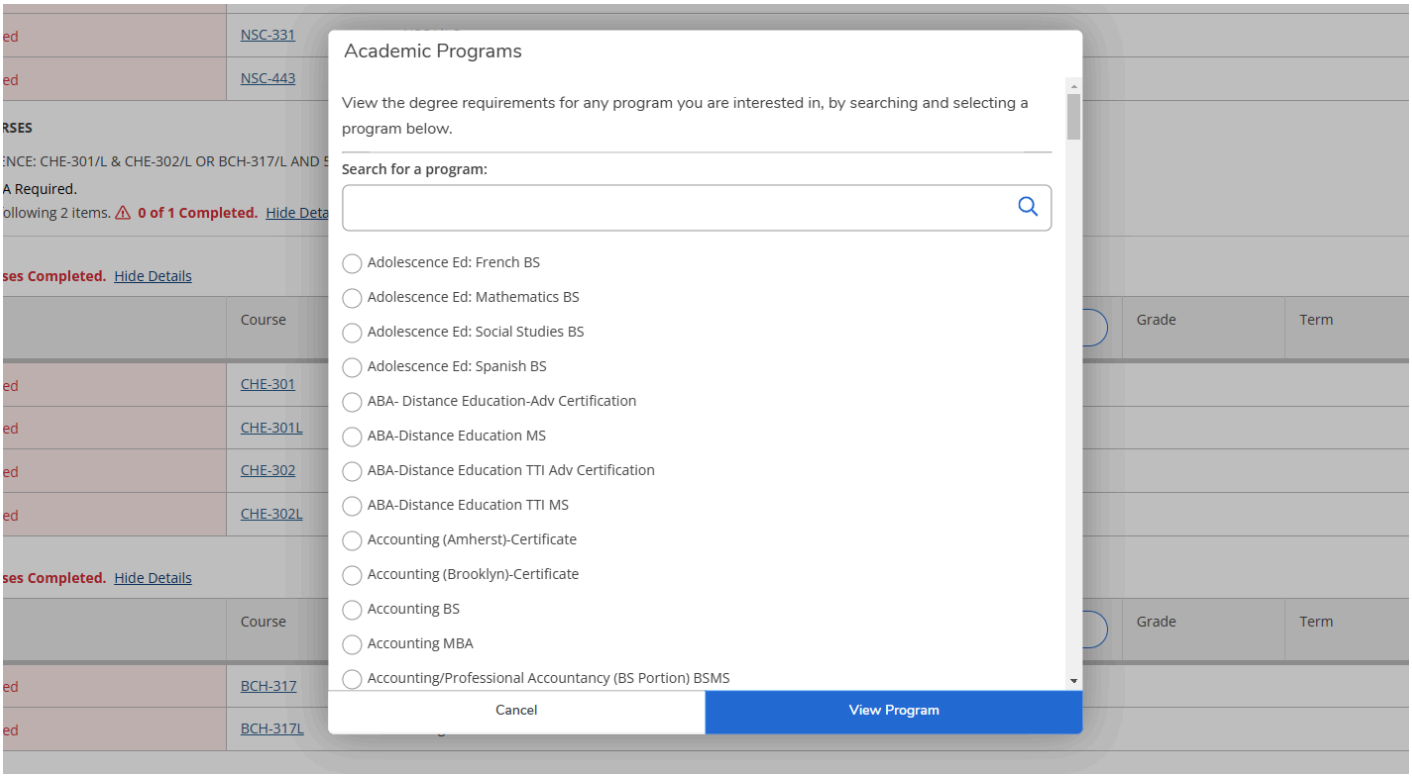
View a New Program

Self-Service's "View a New Program" feature allows you to view the degree requirements for any program an advisee may be interested in.

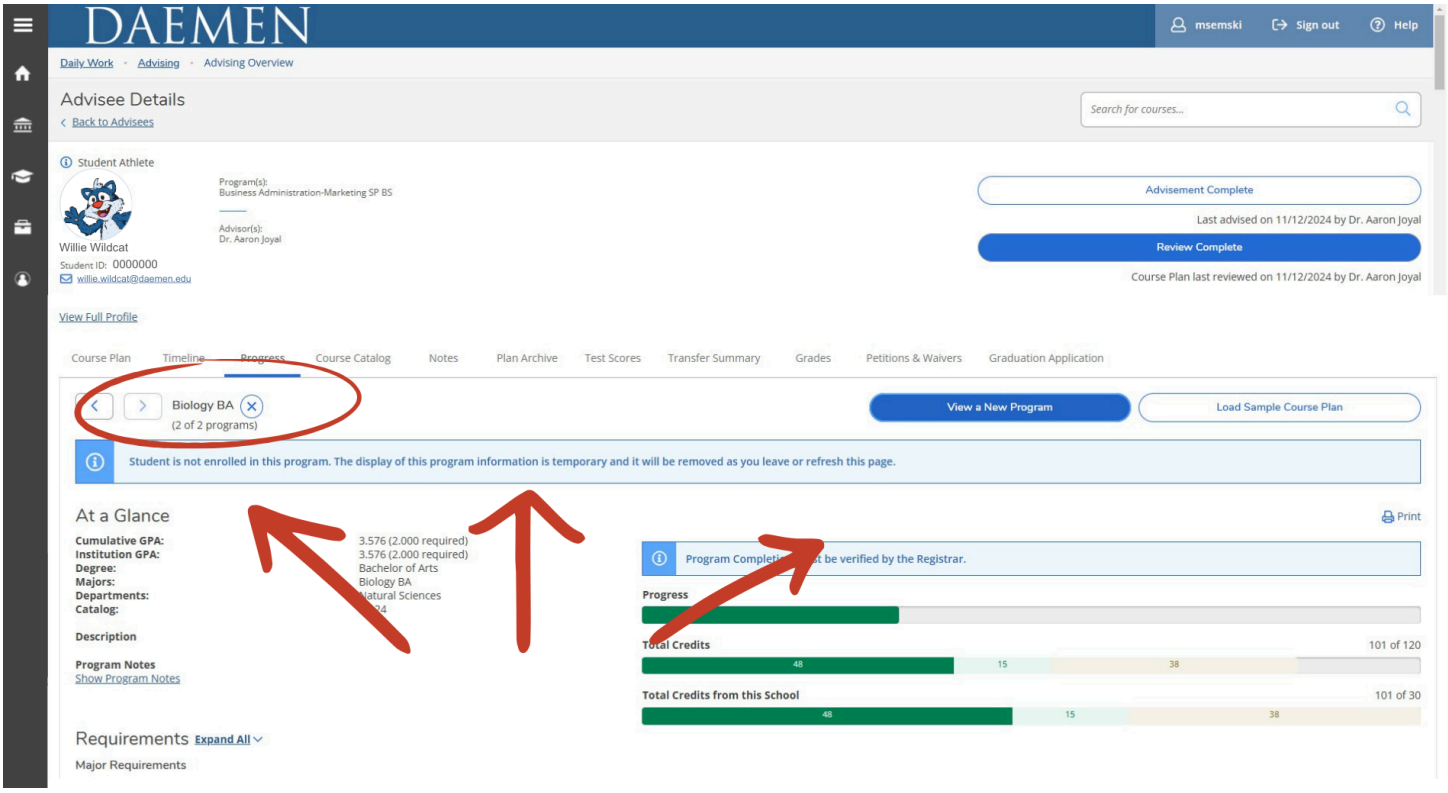
1. Select the "View a New Program" button



2. Then search and select the desired major.

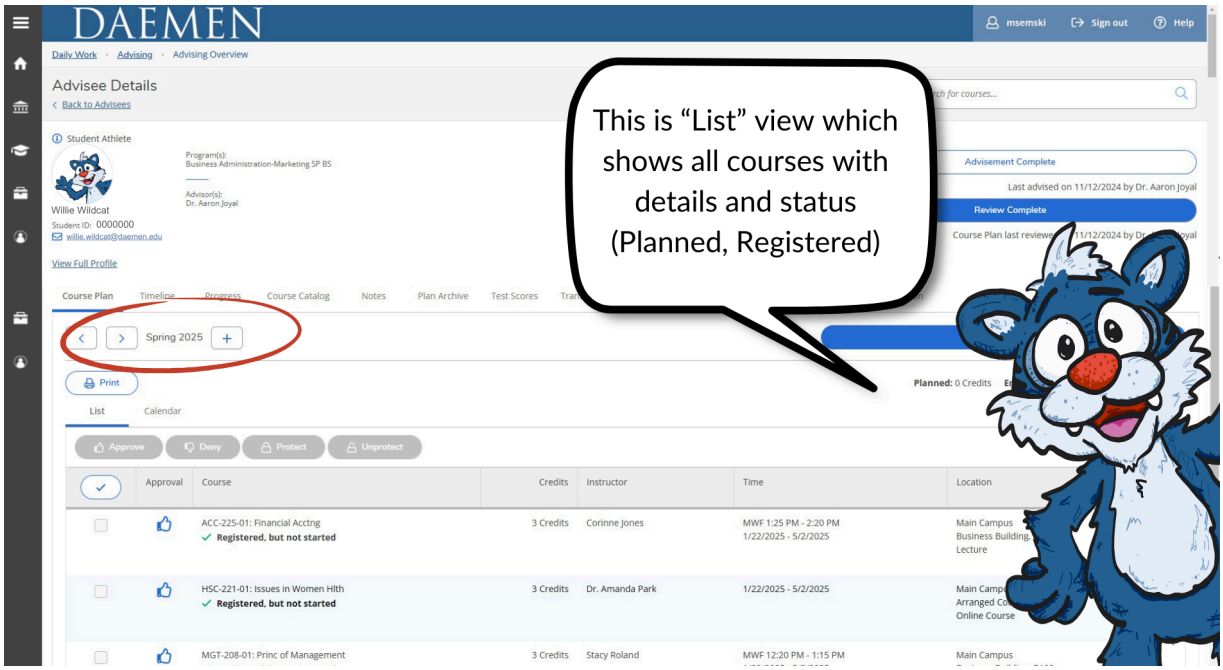


3. Please note that this is not an official evaluation, but gives the degree requirements and a general idea of what previously taken credits will count toward a different degree

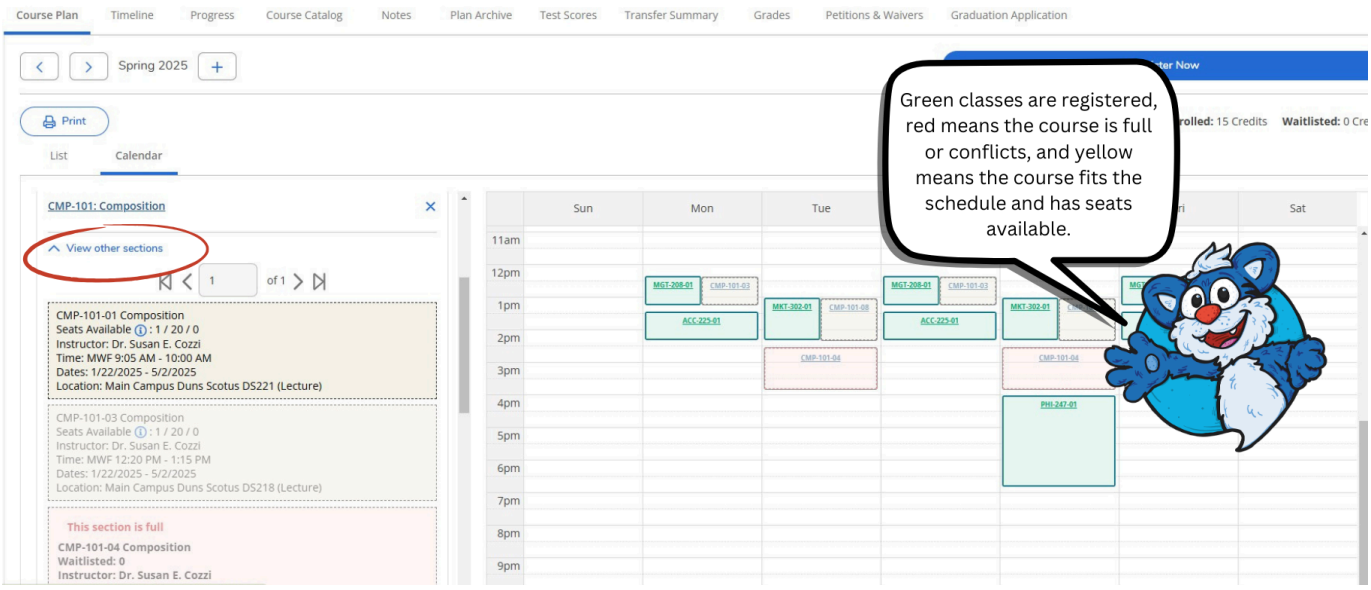


Course Plan

The **Course Plan** will default to the current term if the student is currently registered or if they are not registered, it will default to the last term registered. You can switch between the **List** view and the **Calendar** view



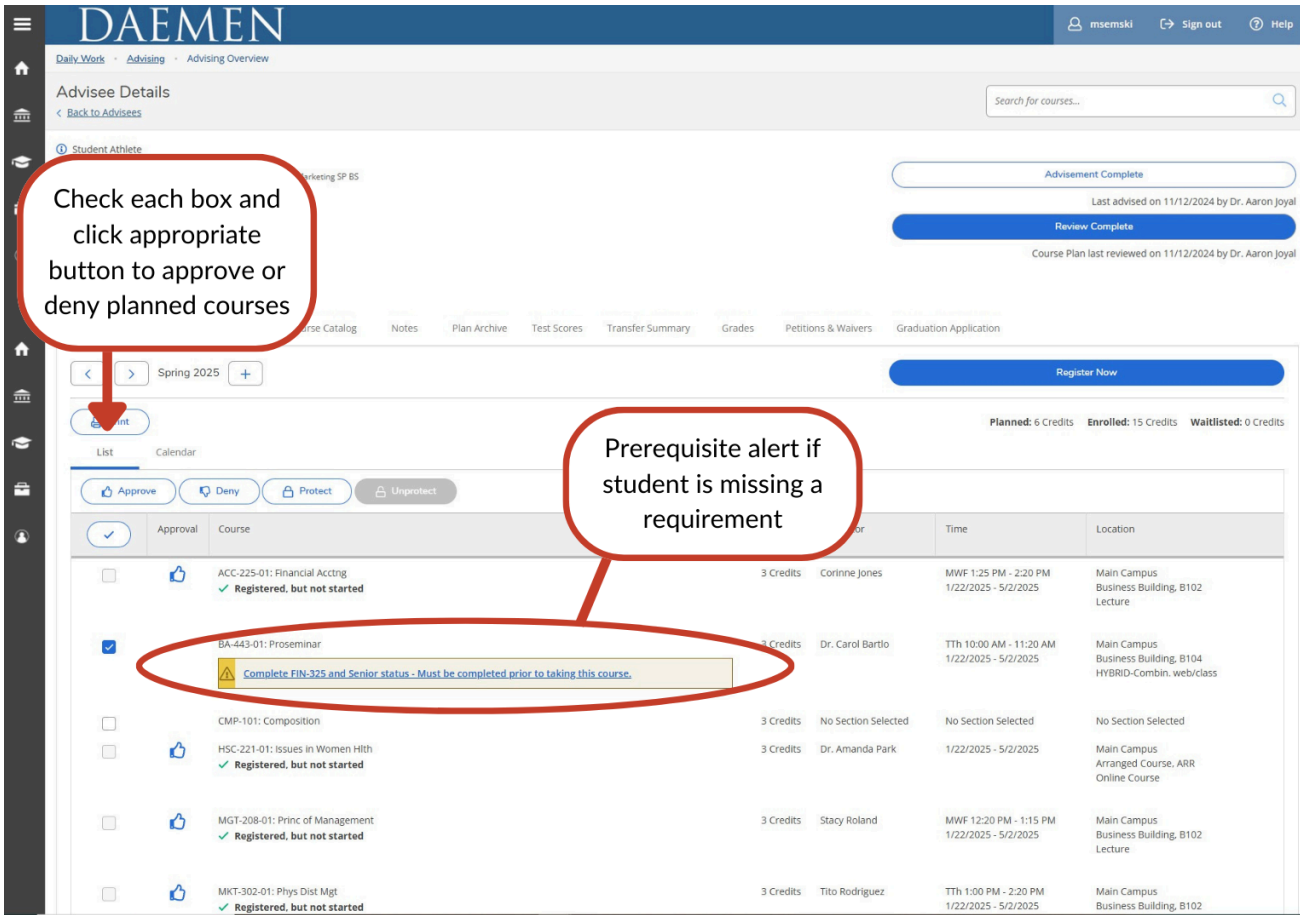
The **Calendar** view is more beneficial when you are helping a student plan their schedule for a particular term because you can easily see section conflicts by clicking "View Other Sections."



COURSE APPROVAL PROCESS

From the Course Plan, you can see what the advisee has planned. A student can plan to take both courses and sections. You can also APPROVE, DENY, and/or PROTECT courses by selecting the course and clicking on the appropriate label in "List" view. Students **must** receive approval to register.

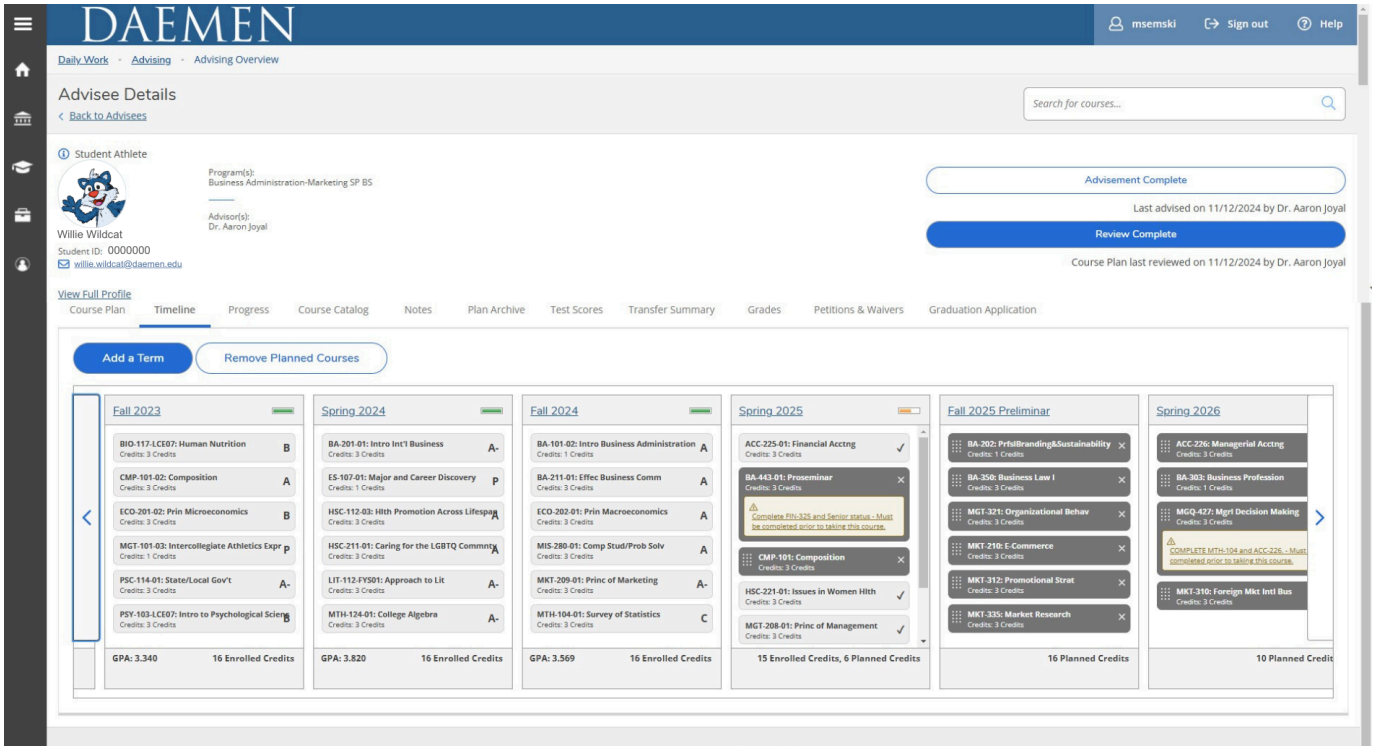
Student Planning will give a warning that a prerequisite or co-requisite exists for a course if it is not currently planned, in progress, or completed.



Protect a course to prevent a student from removing a course from their plan or moving the course from one term to another. To remove a lock on a course, select the course, and then "Unprotect."

Timeline

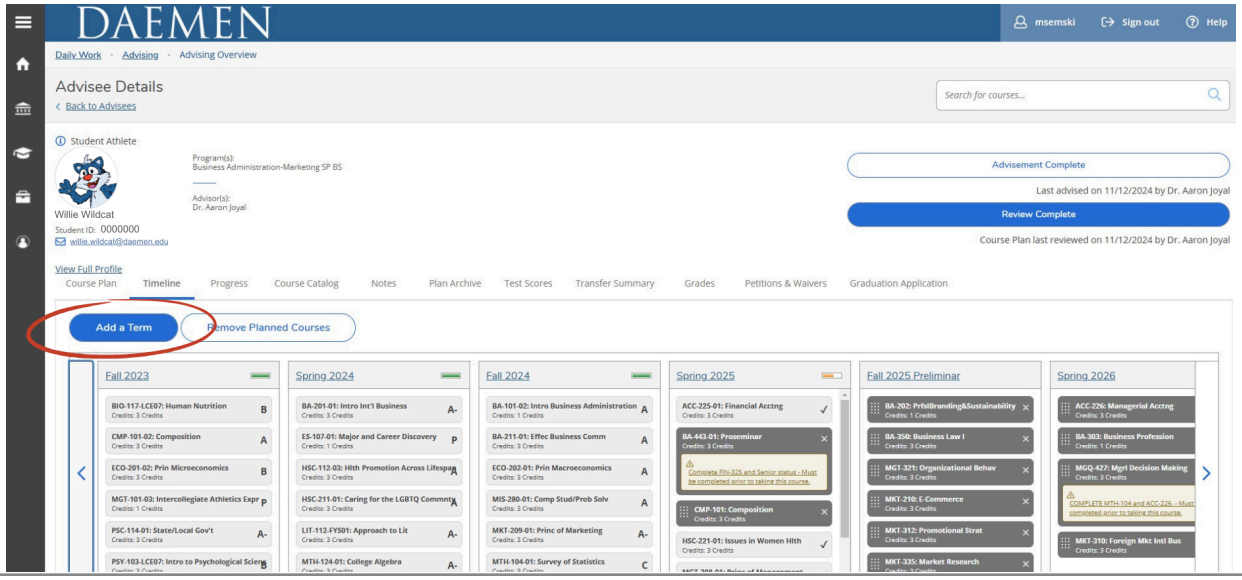
You can also choose **Timeline** to see multiple terms at the same time. You can see past terms and also plan for future terms.



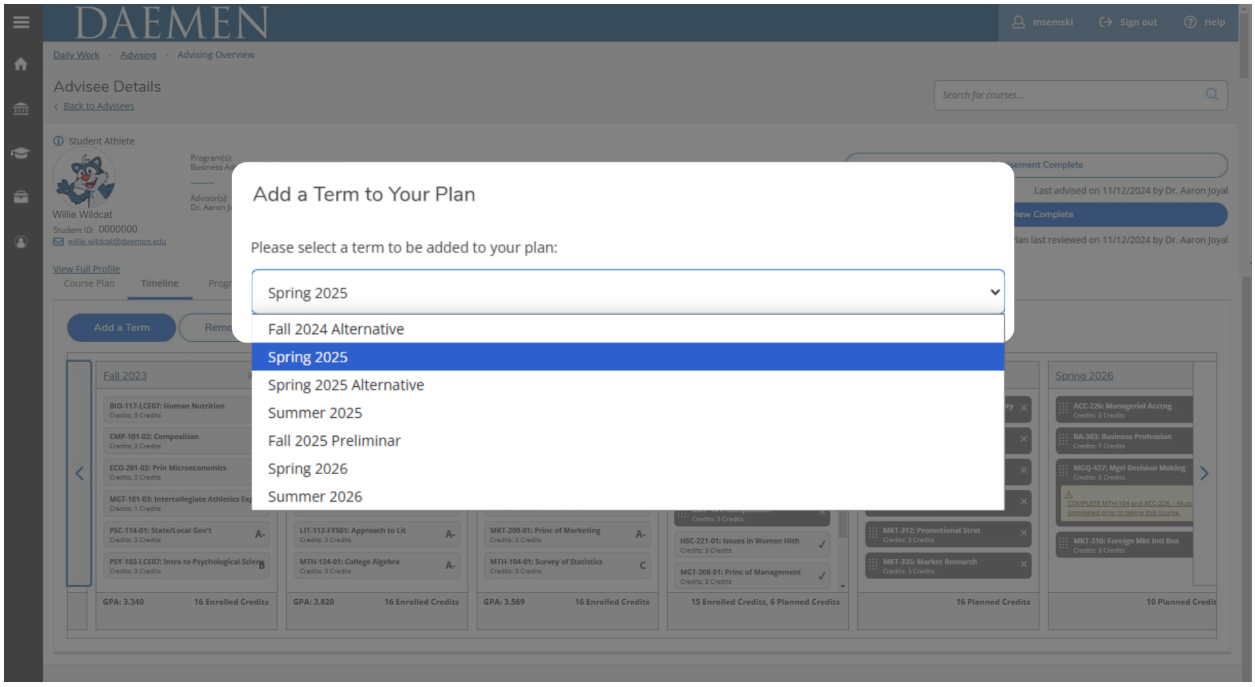
The number of planned, enrolled or completed credits appears at the bottom of each term. The GPA appears if the term is completed.
On the Timeline view, we can remove planned courses. To remove all planned courses, select Remove Planned Courses and choose the term. You cannot undo this option, so use cautionl!

To move courses from term to term:

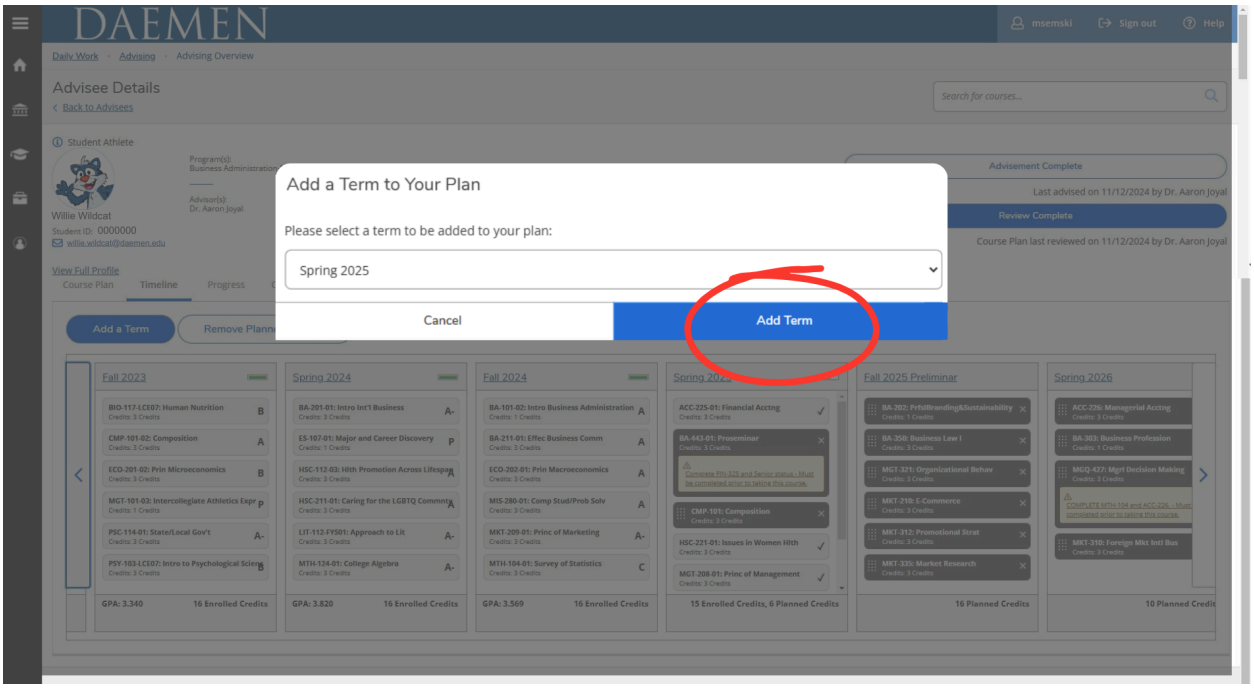
1. Add a future term if it is not displayed on the timeline
2. Click "Add a Term"



3. Select a term to add to the plan



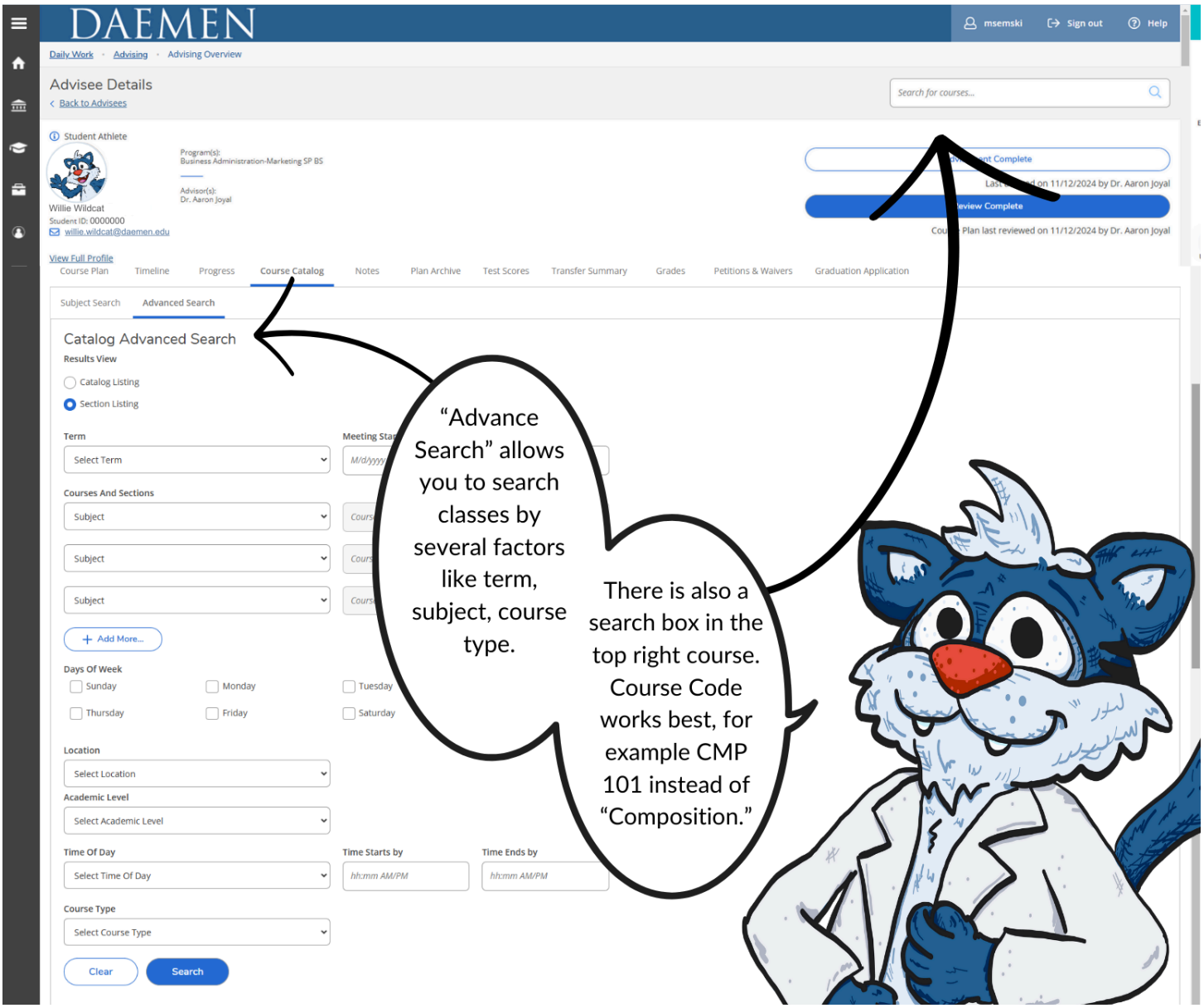
4. Click "Add Term"



Courses can now be dragged and dropped between semesters. Please know that specific sections cannot be moved between semesters as they are unique to that individual semester.

Course Catalog

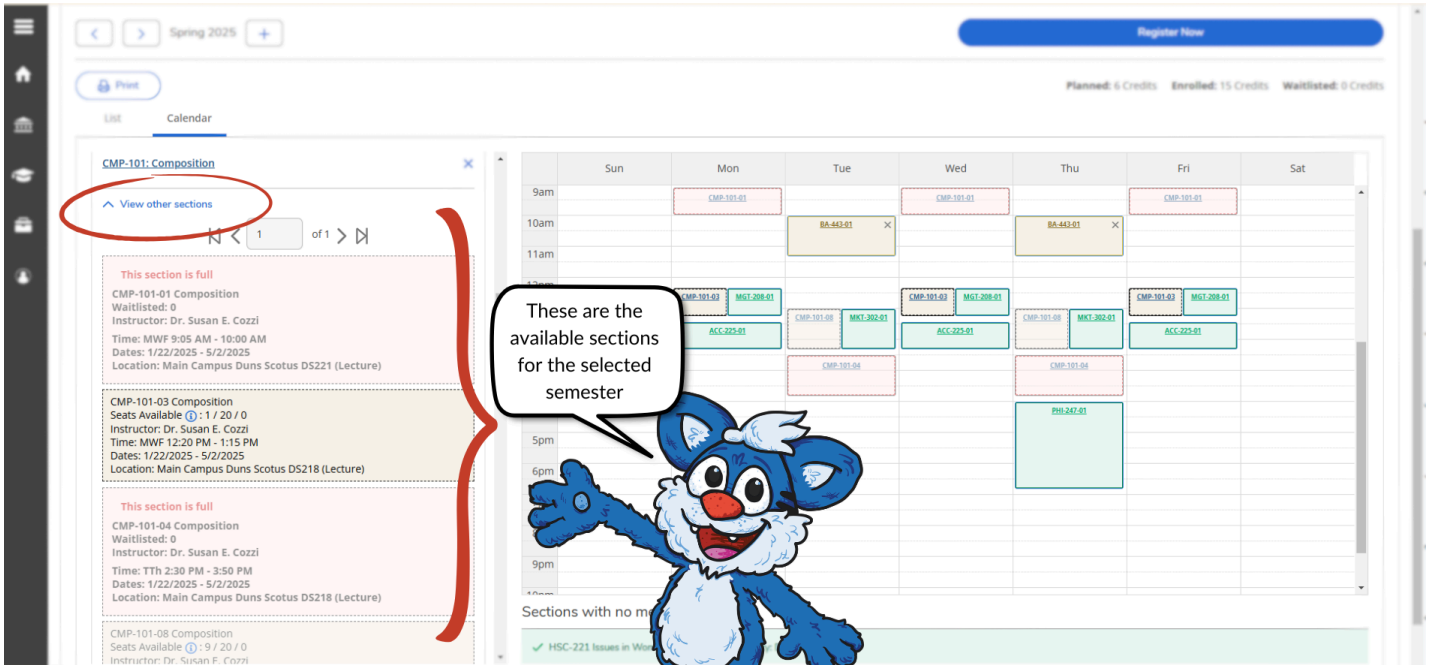
The Course Catalog tab allows you access to the entire College catalog. You can use the Search box in the top-right corner to search. Or you can use the Advanced Search and search by subject, location, course type and more!



Registration/Drop/Add

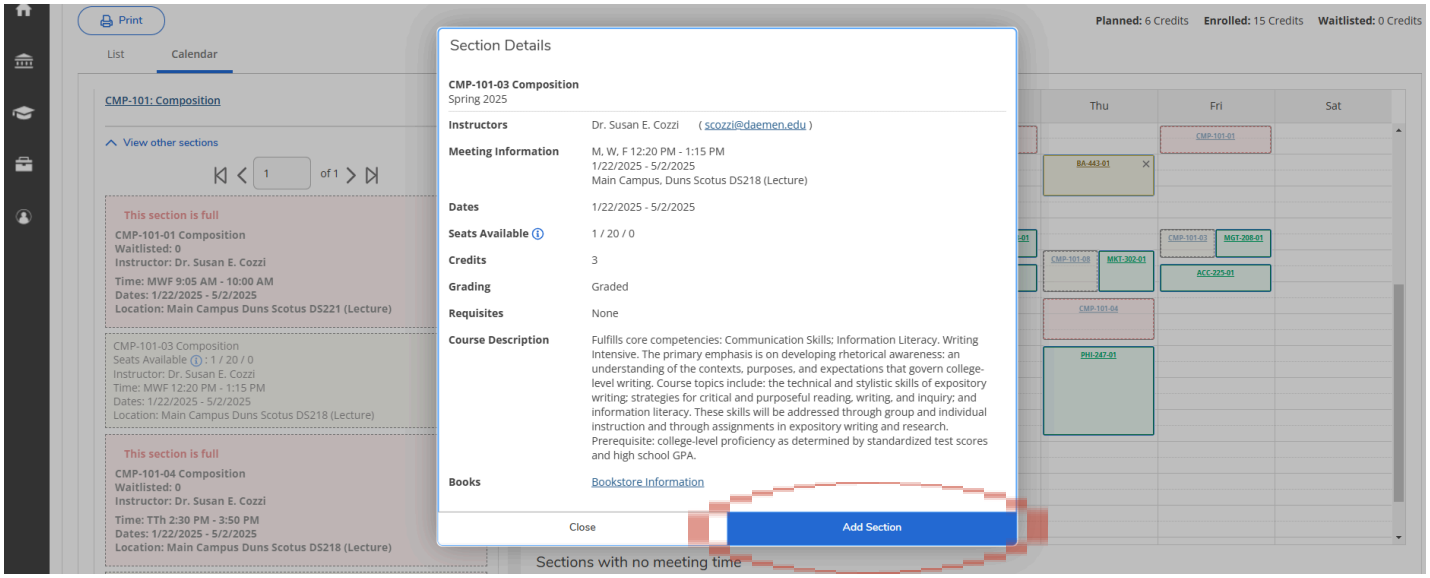
After selecting courses, go back to the Course Plan tab and select the Calendar view.

1. The student's planned courses are listed. If the semester schedule is available, select "View other sections" for each course to get a real-time view of availability for semester planning.

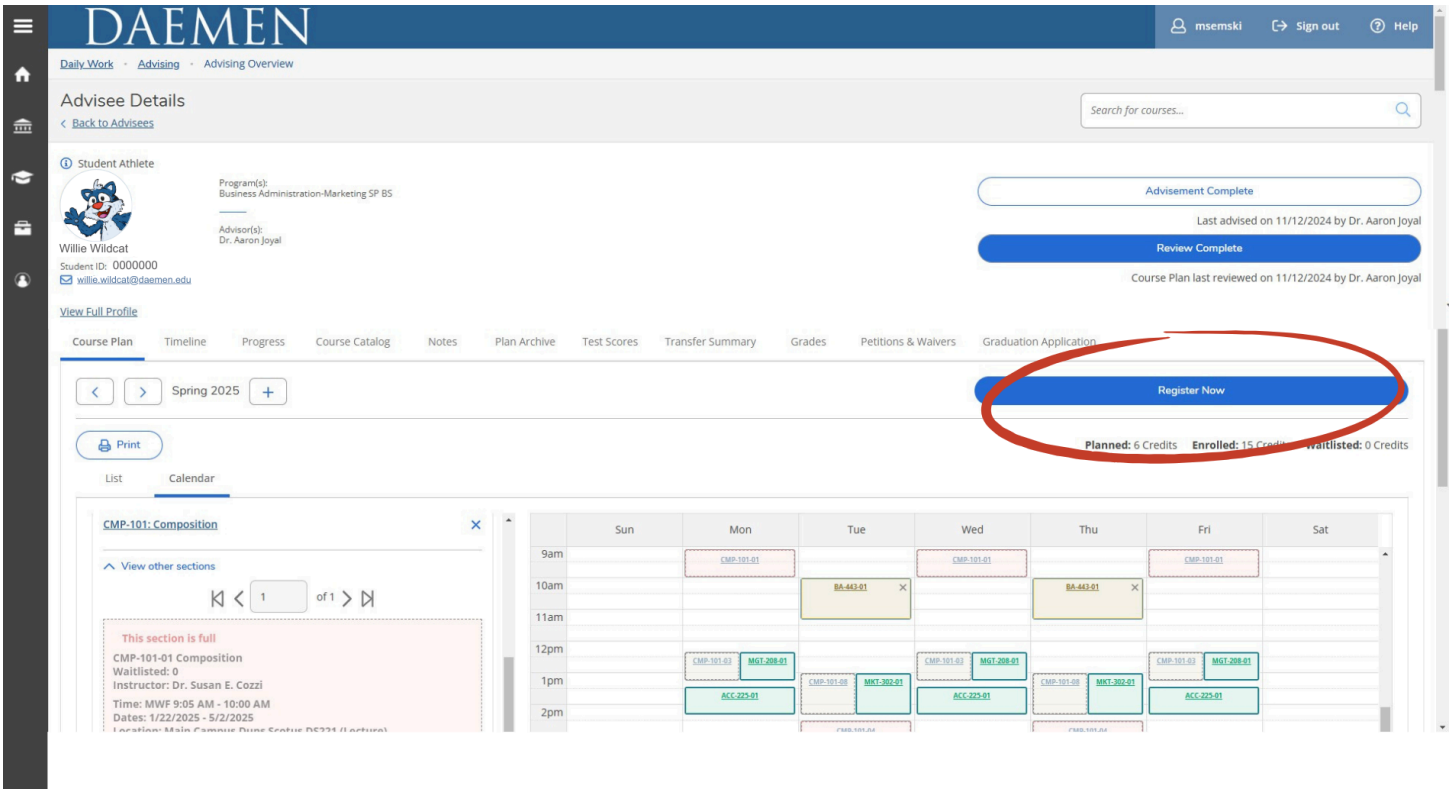


2. Select an appropriate section on the left to review the section details.

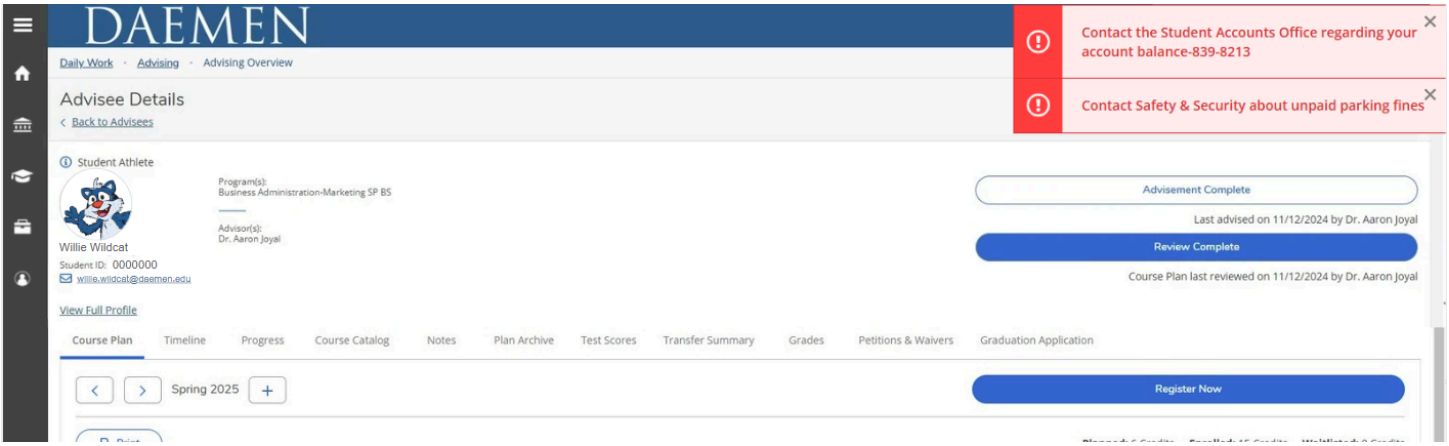
3. Click Add Section to Schedule



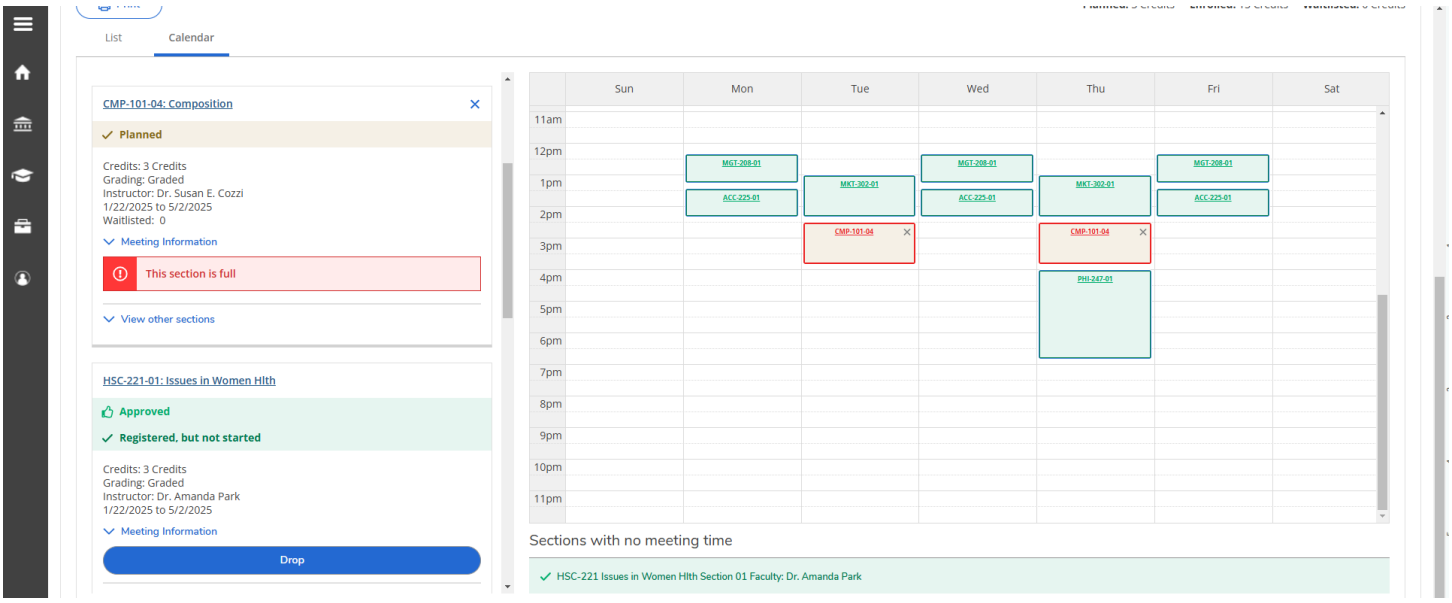
4. If the registration period is open and the course is approved, “Register Now” will enroll the student. **While you do have the ability to register students, we recommend they take the final step in completing their registration.**



5. The student will be registered for all eligible sections. If there are any reasons a section is not registered, Notifications will display.

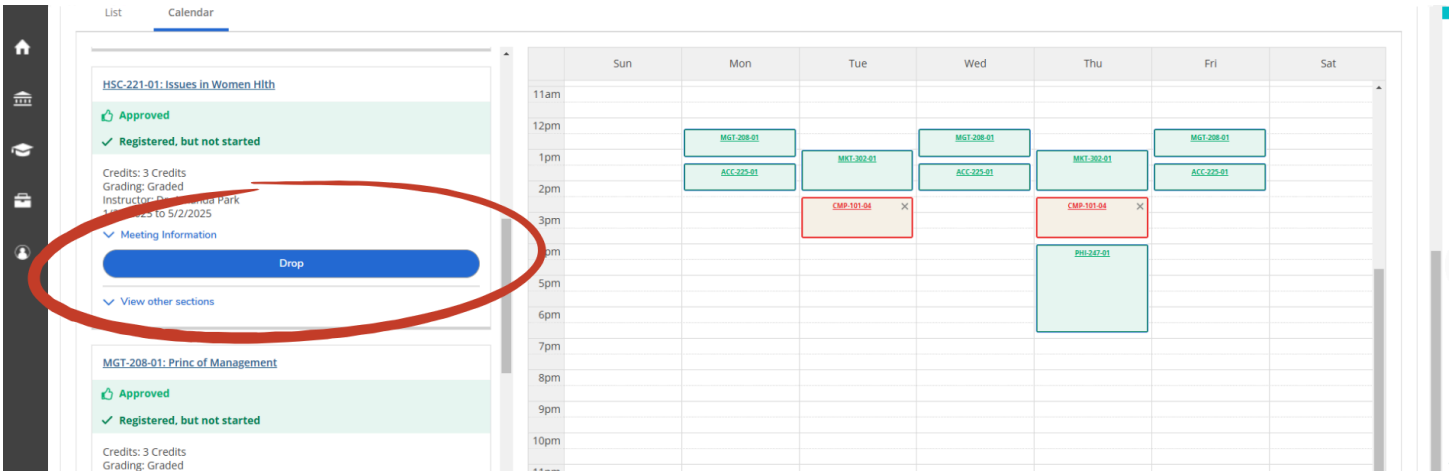


6. The student will still be registered for all other eligible sections. The section will display a status of Registered and turn green.

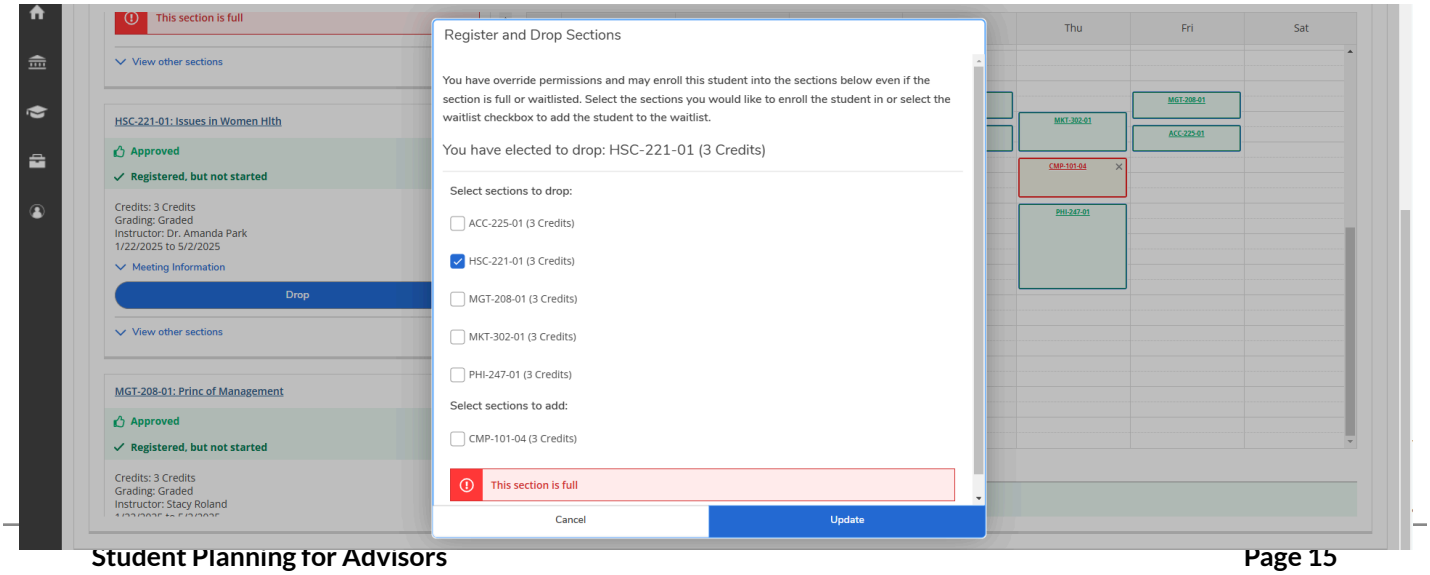


Once registered, drop a section by:

1. Clicking Drop button on that particular section.



2. Choose the sections to drop or add and click “Update” and the section will be listed as planned.

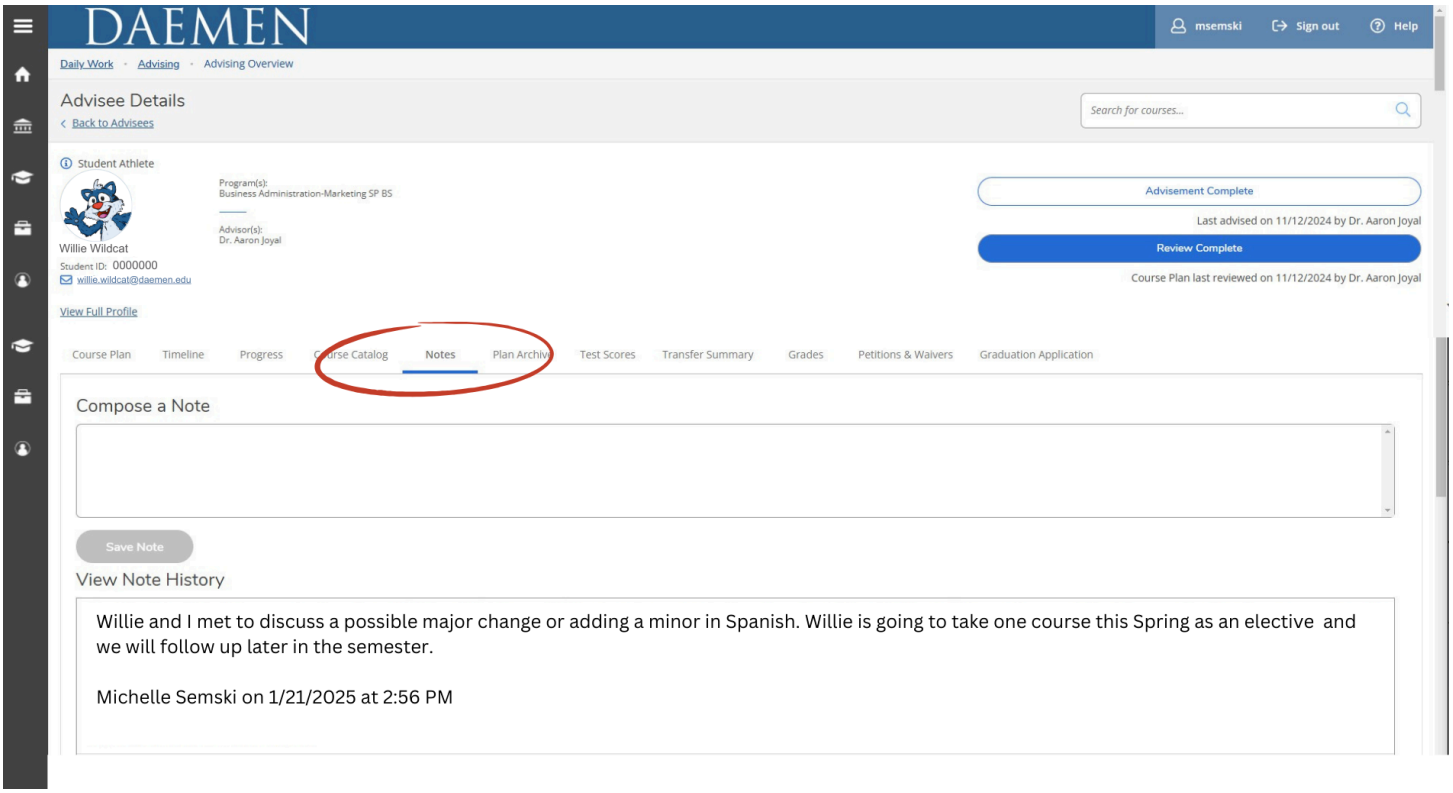


Adding Notes

Select the Notes tab to view notes to and from an advisee. All notes made for the student's plan are listed. Add a note to the plan in the Compose a Note section.

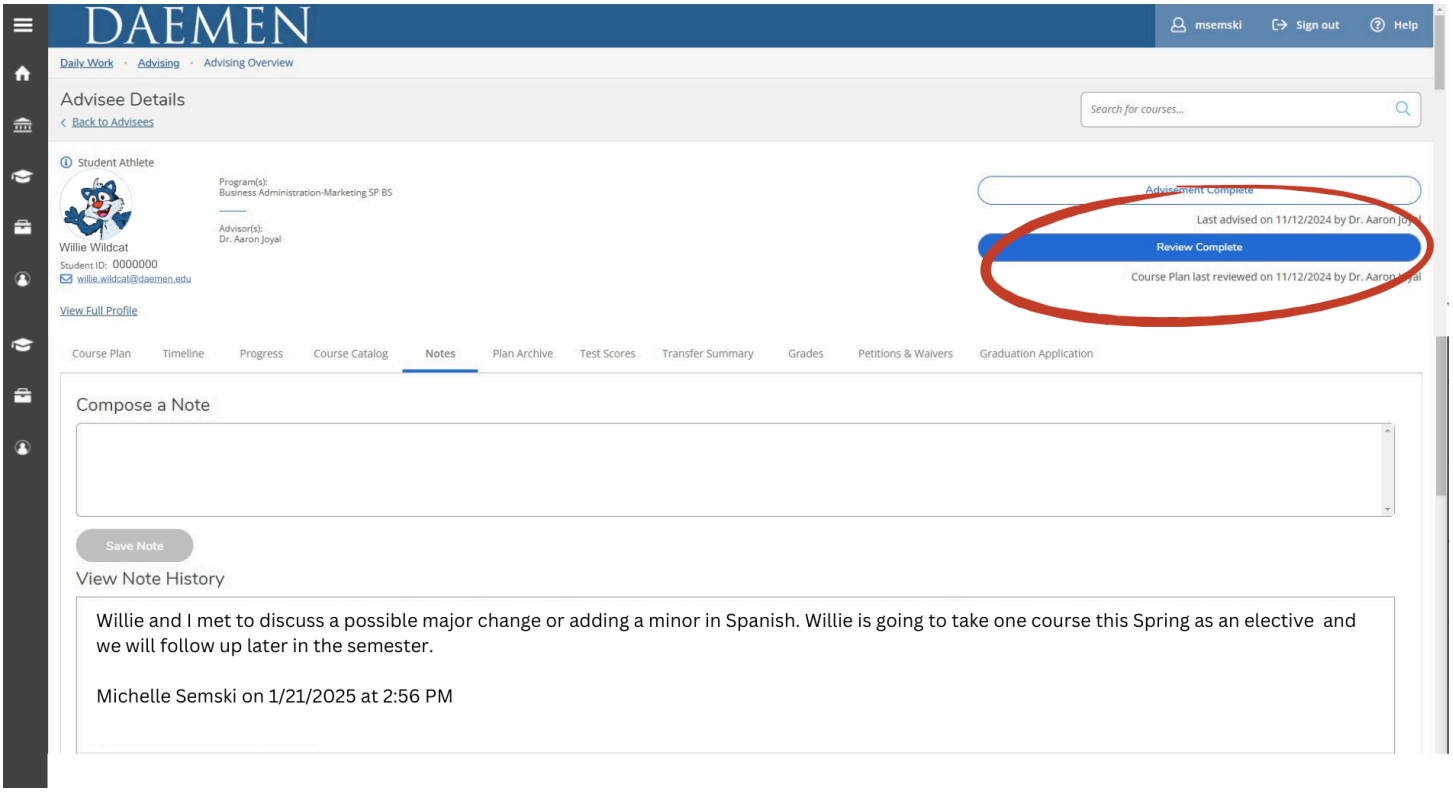
The Notes tab should be used to send a note to your advisee and your advisee can send a note to you as well. Please be careful when sending notes because they cannot be edited or deleted once saved. The notes do remain with the student's record, so if a student changes majors or advisors, it will still be accessible to any advisor who can view the student's plan.

The notes are considered a part of the student's record under FERPA and should be one of your primary methods of communicating with and maintaining notes on the advisee.

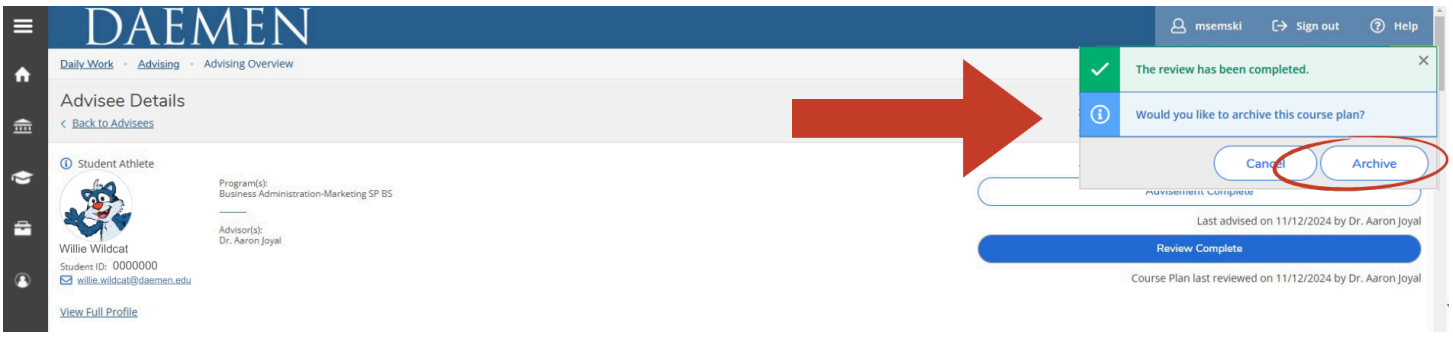


Completing the Review

Once satisfied with the student's plan, mark it complete by clicking "Review Complete." It will also let you know the review is complete and ask if you want to archive the plan.

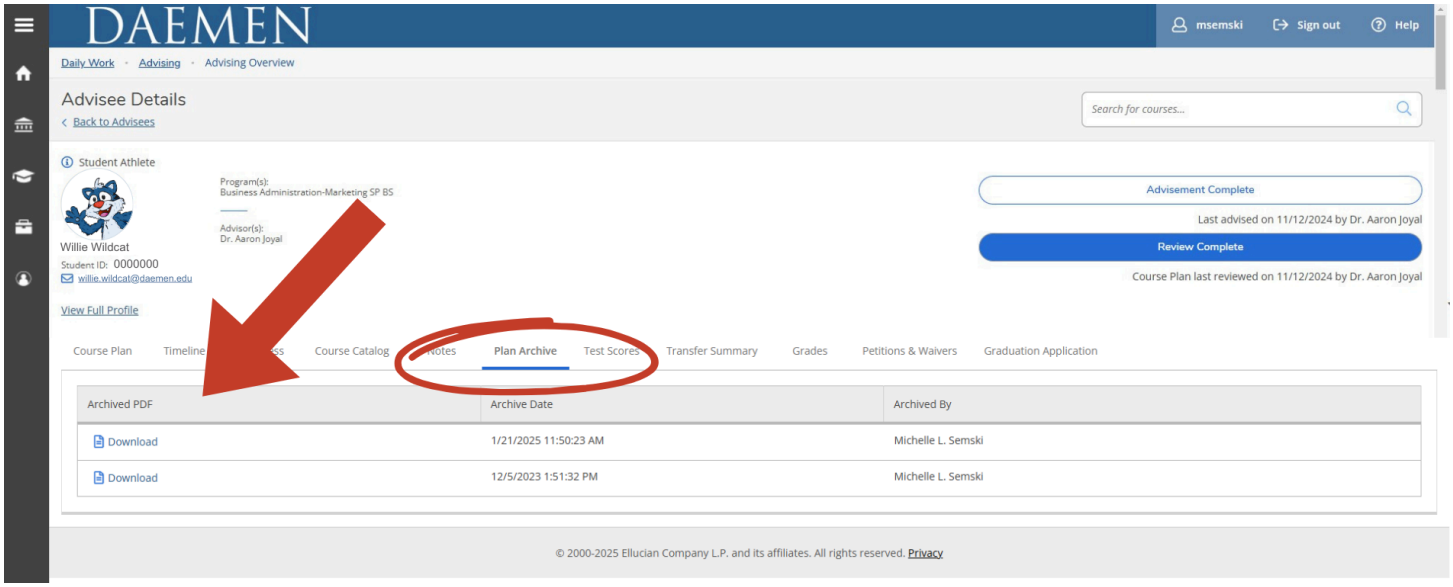


<u>ALWAYS ARCHIVE</u> the plan by clicking the Archive button. Archived Plans are permanently saved and remain with the student's record. This will also remove the time piece next to your advisees's name on your advisee roster and remove them from the top of your advisee list.



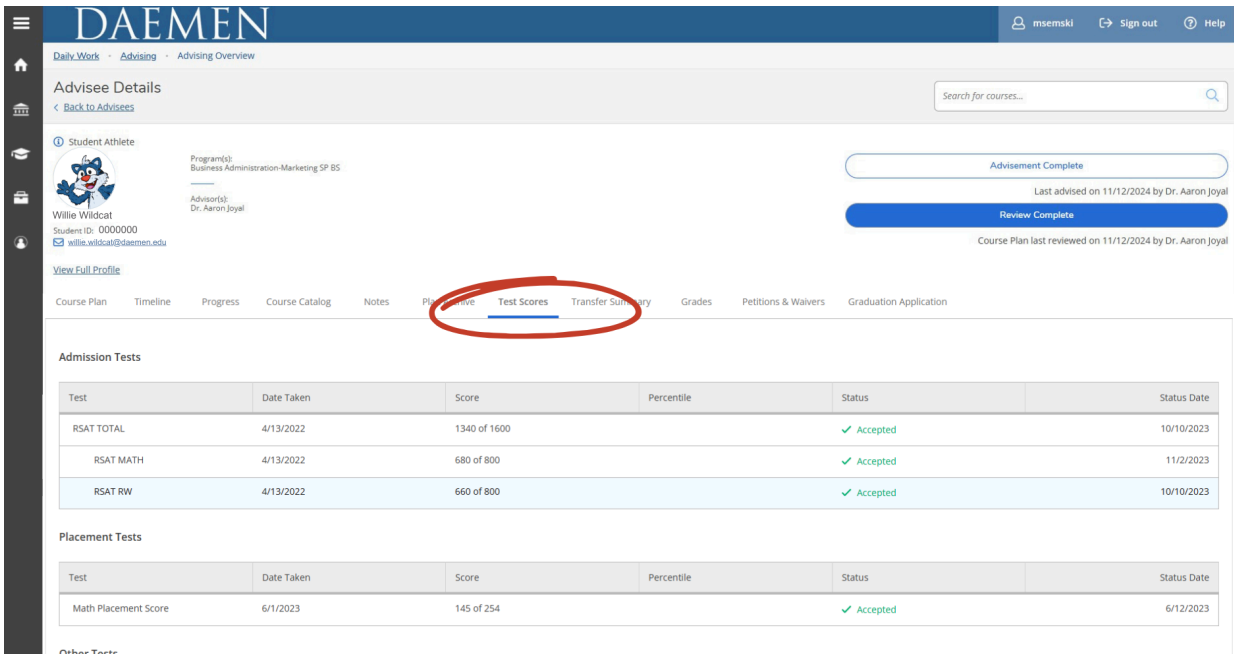
To view the archived advising sessions, select the Plan Archive tab. A list of all the archived course plans is displayed. · Click the Download PDF link for the version of the course plan you want to view.

When prompted by your browser, open the PDF to see all the details of the course plan as it looked at the time it was archived.



Test Scores

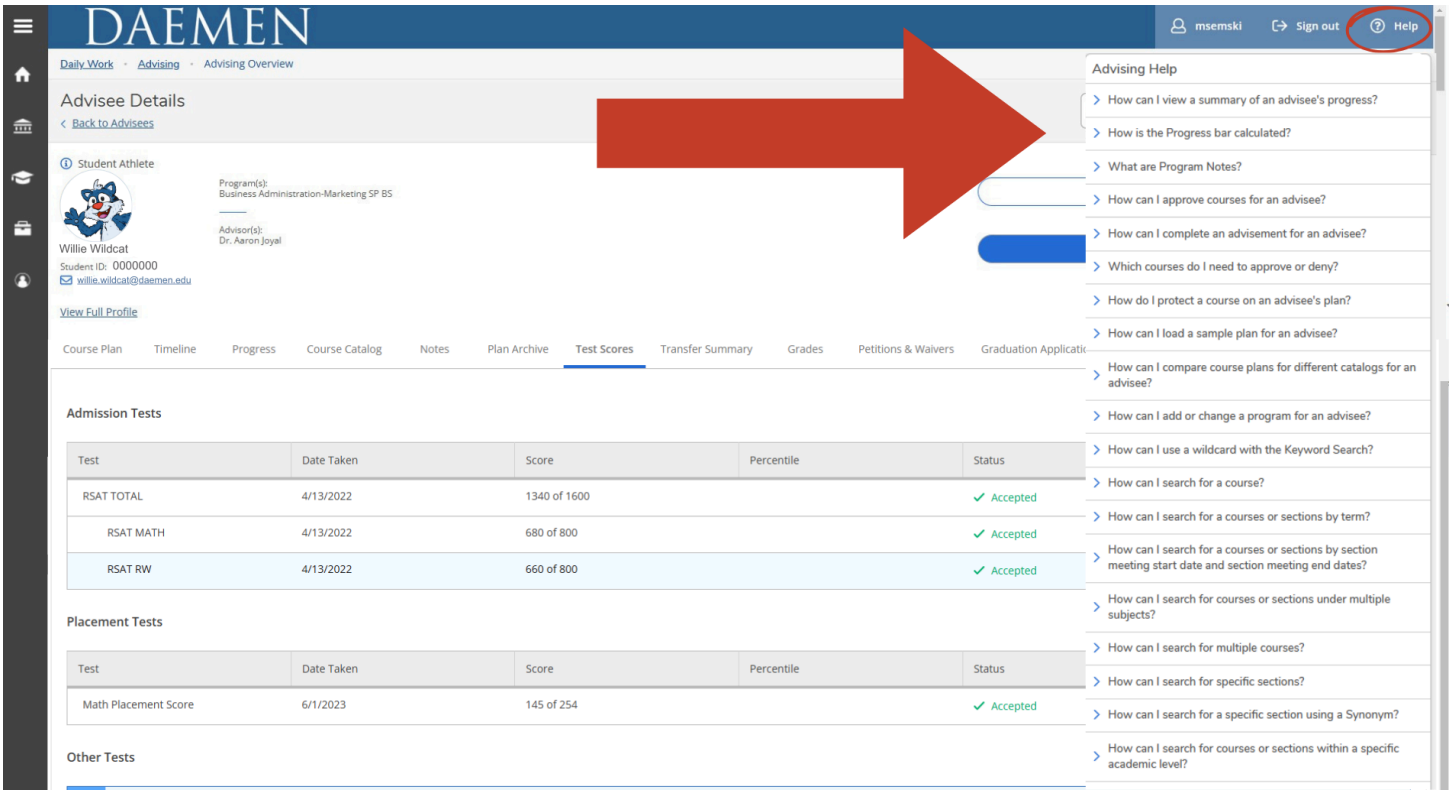
To view the admission, placement, and other tests for an advisee that have been reported to or administered by the college, select Test Scores. Information about each of the tests is displayed including the test type, date taken, and test score.



Help

One other great feature is the Help menu at the top of the page. The Help menu has a detailed list of the most the common questions. It covers most of the basic functions of Student Planning.

If you need additional assistance, please contact: studentplanning@daemen.edu



Three Quick Methods to Create a Plan for a Student

Select Student from List or enter ID Number

Method #1
1. Select "Progress."
2. Select a course that is marked Not Complete OR Select Search for an area Not Complete
3. Add the course to the plan
4. On the picklist, select the term to which you want to add the course.
5. Go back to the Progress View
6. Repeat from Step 2

Method #2
1. Click on "Course Catalog"
2. Search for the course in the top right field, using the specific course subject and course number (i.e. PSY 103)
3. Add the course to the plan
4. From the picklist, select the term where you want to add the course to.
5. Repeat from Step 3

Method #3
1. Click on Course Catalog
2. Click on the subject that you would like to search for (i.e. Psychology).
3. Select the course (i.e. PSY 103)
4. Add the course to the plan
5. From the picklist, select the term which you want to add the course.
6. Repeat from Step 2

Helpful Tips

- You can click on "Progress" or the "Timeline" at any time.
- Progress will display the courses by requirement that are *COMPLETED, NOT STARTED, or PLANNED* in the student's audit.
- The "timeline" will display the courses by term as *COMPLETED, NOT STARTED OR PLANNED.* · You can move courses from term to term via Timeline; click on the course and select a different term from the drop-down menu.
- You can delete any course or term from the Timeline view by clicking the top, right X.
- Students and advisors are not notified when notes are added but are useful to provide additional information about the plan.

Your advisees can request a review of their plan at any time. If they request a review, you will receive email notification. You will also have a notification when you log in and an hourglass notification next to the requesting advisee's name.