Self Service Advisor Training

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

Self-Service modules
Self-Service consists of a number of modules that enable users to complete tasks, such as advising students or applying for graduation, independently.

- Student Planning
- Graduation
- Faculty
- Student Finance

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

Log onto MyDaemen and click on Self Service. This link will automatically take you to the Self Service module.
Select the Advising Tab

Your current advisees will display. Choose the Advisee you would like to access by clicking on their name:

Use the Search box to search for a particular advisee.
- Enter the advisee ID number with leading zeroes.
- Enter the advisee name in either first name and last name order, or last name, comma, first name order.
- Enter a portion of the advisee name such as "Smi" to find all advisees whose last name begins with "smi".
**Progress**

The **Progress** tab is basically a student’s degree audit. It displays student specific information at the top.

![Course Plan](image)

**Progress** is now an interactive degree audit.

Click the **Search** box to see the list of courses that meet that requirement.
It takes you over to the **Course Catalog** and lists the courses that meet the requirement. 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 that are available by choosing a term, instructor, time of day, location, levels, and/or course types.
Add Course to Plan or Add Section to Schedule

The course is Planned on Progress.
View a New Program

View the degree requirements for any program an advisee may be interested in, by searching and selecting a program from the list.

The programs that are related to the student’s current program will appear at the top of the list. Review the related programs during each advising session in order to assist students in selecting courses or electives that may enable them to complete an additional degree or certificate.

- Select a program the student is interested in
- Click View Program
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. Students must receive approval in order to register.

Student Planning will give a warning that a prerequisite or co-requisite exist 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 the Timeline to see future, past terms and multiple terms at the same time.

The number of planned, enrolled or completed credits appear 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 be careful!

To move courses from term to term:

- Add a future term if it not displayed on the timeline:
  - Click Add a Term
  - Select a term to add to plan
  - Click Add Term
- Click on the Course title

- Select the term from the drop down list
- Click **Update Course**
The **Course Catalog** tab allows you access to the entire College catalog. You can use the **Search for courses**… box to search for a particular course or for a word in that course name or description. You can search for a subject by entering it in the **Search for a course subject**: box or scrolling through the list of subjects.

**Registration/Drop/Add**
After selecting courses, go back to the **Course Plan** tab and select the **Calendar** view. 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 the semester planning.

Select the chosen sections on the left.
Click Add Section to Schedule

If the registration period is open and the course is approved, Click Register Now.
The student will be registered for all eligible sections. If there are any reasons a section is not registered, **Notifications** will display.

- **ACNT-1303-101HY** - You must complete the online learner’s workshop before enrolling
- **ARTS-1301-310CL** - Student requires instructors consent to register in ARTS-1301-310CL
- **BUSI-2301-101CL** - The GL account 11-0-0000-0000-4210 has a status of “A” for the 2016 ledger.

The student will still be registered for all other eligible sections. The section will display a status of **Registered** and turns green.
Once registered, drop a section by clicking **Drop** button on that particular section.

Choose the sections to drop or add and click **Update**.

The section returns to a **Planned** status.
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 once saved, they cannot be edited or deleted. 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 the clicking Review Complete. It will also let you know the review is complete and ask if you want to archive the plan.
ALWAYS ARCHIVE 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 advisee’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 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 A
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 where you want to add the course to.
5. Go back to the Progress View
6. Repeat from Step 2

Method B
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. PSYC 1305) and press enter.
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 C
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. PSYC 1305)
4. Add the course to the plan
5. From the picklist, select the term where you want to add the course to.
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.
- 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.
- You can send a note to the student regarding the plan using the Notes tab. This does not notify the student/advisor that there is a note. Use it to provide additional information about the plan.

BEST PRACTICE: Save your plan: Click on Review Complete. Click Yes to archive 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.