

Daemen College

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.

The screenshot displays the MyDaemen portal interface. On the left, a 'Quick Tools' menu is open, listing various services. The 'Self Service' option is circled in red, and a red arrow points to it from the right. Other items in the menu include Blackboard, Colleague, Directory, Email, Library, Offices and Services A to Z, Student Leader Application, and WebAdvisor. The main content area features several widgets: 'myDrive' (Google Drive) with a list of reports and documents; 'Technology' and 'Maintenance' sections with search bars and 'Submit a Helpdesk Ticket' buttons; 'Library' with 'RIC Hours' and 'Library Account' buttons; 'Dining' with logos for 'slice & sizzle', 'griglia', 'gemisto', 'Sabai', and 'TossUp'; 'Employee Engagement' with 'ADP Workforce Now' and 'Employee Forms' buttons; 'Class Cancellations' showing 'No current cancellations'; and 'Athletic Events'. A calendar widget shows dates for the 25th and 26th. The bottom right corner displays event information for Thursday, October 24, 2019, including 'Food Day Info Table' and 'Pastor Kwame - Open Hours'.

Select the Advising Tab

The screenshot shows the Daemen Self-Service portal. The top navigation bar includes the Daemen logo, the user name 'sfennell', and links for 'Sign out' and 'Help'. Below the navigation bar, a welcome message reads 'Hello, Welcome to Colleague Self-Service!' followed by the instruction 'Choose a category to get started.' Three main categories are displayed: 'Course Catalog' (with a sub-description 'Here you can view and search in course catalog'), 'Advising' (with a sub-description 'Here you can access your advisees and provide guidance & feedback on their academic planning.'), and 'Faculty' (with a sub-description 'Here you can view your active classes and submit grades and waivers for students.'). The 'Advising' category is circled in red.

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

The screenshot shows the 'Who would you like to work with?' interface. At the top, there is a search box labeled 'Name or ID:' with the placeholder text 'Type a name or ID...'. To the right of the search box are filter options: 'Student' (selected) and 'Advisor'. A 'Search' button is located to the right of the filter options. Below the search box is a table of students:

Name	ID	Program	Advisor(s)
Test, David G.	0062761	Undeclared	Tanya Crump
Test, Tenacious	0217966	Associate of Applied Science in Bus Adm/Emphasis Acct, Associate of Arts - General Studies	Alexis Vance, Tanya Crump
Test, William S.	0210932	Associate of Arts Degree - Business	Tanya Crump

The 'Test, Tenacious' entry is circled in blue.


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".

This screenshot is similar to the previous one, showing the 'Who would you like to work with?' interface. The search box 'Name or ID:' is circled in blue, indicating where to enter search criteria.

Progress

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



Tenacious Test
Student ID: 0217908
emoores@com.edu

[Review Complete](#)

Advisor(s): Alexis Vance, Tanya Crump

Course Plan | Timeline | **Progress** | Course Catalog | Notes | Plan Archive | Test Scores | Unofficial Transcript

Associate of Applied Science in Bus Adm/Emphasis Acct
(1 of 2 programs)

[View a New Program](#)

[Load Sample Course Plan](#)

At a Glance

Cumulative GPA: ❗ 0.000 (2.000 required)

Institution GPA: ❗ 0.000 (2.000 required)

Degree: Associate of Applied Science

Majors: Bus Adm/Emphasis in Accounting

Departments: Business Management

Catalog: 15-16

Description

Program Notes

[Show Program Notes](#)

Program Completion must be verified by the Registrar.

Progress

Total Credits (0 of 60)

60

Total Credits from this School (0 of 15)

15

Progress is now an interactive degree audit.

Click the **Search** box to see the list of courses that meet that requirement.

A. Human/Creative Arts

Take 3 credits from ARTS-1301,ARTS-1303,ARTS-1304,DRAM-1310, DRAM-2366,ENGL-2307,ENGL-2322,ENGL-2323,ENGL-2327, ENGL-2328,ENGL-2332,ENGL-2333,ENGL-2342,ENGL-2343, ENGL-2351,HUMA-1301,HUMA-1302,MUSI-1301,MUSI-1304, MUSI-1306,MUSI-1308,MUSI-1309,MUSI-1310,PHIL-1301, PHIL-1304,PHIL-2306,SPAN-2311,SPAN-2312;

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

Status	Course	Grade	Term	Credits
❗ Not Started	ARTS-1301 Art Appreciation (050)	<input type="text" value="Search"/>		
❗ Not Started	ARTS-1303 Art History I (050)			
❗ Not Started	ARTS-1304 Art History II (050)			
❗ Not Started	DRAM-1310 Intro to Theatre (050)			
❗ Not Started	DRAM-2366 Dev of Motion Pict I (050)			
❗ Not Started	ENGL-2307 Creative Writing I (050)			
❗ Not Started	ENGL-2322 British Lit I (040)			
❗ Not Started	ENGL-2323 British Lit II (040)			
❗ Not Started	ENGL-2327 American Lit I (040)			
❗ Not Started	ENGL-2328 American Lit II (040)			
❗ Not Started	ENGL-2332 World Lit I (040)			
❗ Not Started	ENGL-2333 World Lit II (040)			
❗ Not Started	ENGL-2342 Forms Lit I - Post-Apocalyptic			

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.

The screenshot shows a web-based Course Catalog interface. On the left side, there is a vertical sidebar containing various filter categories, each with a list of options and checkboxes. A red circle highlights this entire sidebar area. The main content area on the right displays search results for courses matching a requirement. At the top, it lists course numbers and titles, followed by a list of filters applied (currently none). Below this, several course cards are shown, each with a title, credit value, and a brief description. Each card includes a 'View Available Sections' button and an 'Add Course to Plan' button. The courses listed are:

- ARTS-1301 Art Appreciation (060) (0 CEUs)**: An introduction to the visual arts through the study of formal elements, iconography, major historical movements and the history of aesthetics as well as an exploration of the historical and contemporary media. Students will learn to analyze visual art. A few classes will be dedicated to field trips and studio experience. Prerequisite: TSI Reading 348 or equivalent developmental course.
- HUMA-1301 Humanities I (040) (0 CEUs)**: This is an interdisciplinary, multi-perspective assessment of cultural, political, philosophical and aesthetic factors critical to the formulation of values and the historical development of the individual and of society. The course covers early civilization to 1800. Prerequisite: ENGL 1301 with a grade of 'C' or better.
- MUSI-1301 Fund of Music (060) (0 CEUs)**: This is an elementary course in the fundamentals of music, notation, scales, keys, primary chords and basic rhythmic patterns. No previous musical knowledge is needed. Class electronic piano lab for applying musical knowledge is part of course. Prerequisite: TSI 348 reading or equivalent developmental course.
- PHIL-1301 Intro to Phil (040) (0 CEUs)**: A study of major issues in philosophy and/or the work of major philosophical figures in philosophy. Topics in philosophy may include theories of reality, theories of knowledge, theories of value, and their practical applications. Prerequisite: ENGL 1301 with a grade of 'C' or better.
- HUMA-1302 Humanities II (0 CEUs)**: This is an interdisciplinary, multi-perspective assessment of cultural, political, philosophical and aesthetic factors critical to the formulation of values and the historical development of the individual and of society. The course covers 1800 to present. HUMA 1301 is not a prerequisite for HUMA 1302. Prerequisite: ENGL 1301 with a grade of 'C' or better.

Add Course to Plan or Add Section to Schedule

ARTS-1301 Art Appreciation (050) (0 CEUs) **Add Course to Plan**

An introduction to the visual arts through the study of formal elements, iconography, major historical movements and the history of aesthetics as well as an exploration of the historical and contemporary media. Students will learn to analyze visual art. A few classes will be dedicated to field trips and studio experience. Prerequisite: TSI Reading 346 or equivalent developmental course.

Requisites: TSI Reading 346 or equivalent developmental course. - Must be completed prior to taking this course.

View Available Sections for ARTS-1301

Credit Fall 2015

Art Appreciation (050) 010IN **Add Section to Schedule**

Seats	Times	Locations	Instructors
25	8/24/2015 - 1/8/2016	Internet Course, Internet INT Internet Lecture	Peet, C

Art Appreciation (050) 011IN **Add Section to Schedule**

Seats	Times	Locations	Instructors
25	8/24/2015 - 1/8/2016	Internet Course, Internet INT Internet Lecture	Bowes, G

Art Appreciation (050) 211CL **Add Section to Schedule**

Seats	Times	Locations	Instructors
25	Th 6:00 PM - 8:50 PM	COM Main Camous. Fine Arts Bldg. 135	Bowes, G

The course is **Planned** on Progress.

Humanities/Creative Arts Requirement

Complete the following item. 0 of 1 Completed. ✔ Fully Planned [Hide Details](#)

A. Human/Creative Arts

Take 3 credits from ARTS-1301, ARTS-1303, ARTS-1304, DRAM-1310, DRAM-2366, ENGL-2307, ENGL-2322, ENGL-2323, ENGL-2327, ENGL-2328, ENGL-2332, ENGL-2333, ENGL-2342, ENGL-2343, ENGL-2351, HUMA-1301, HUMA-1302, MUSI-1301, MUSI-1304, MUSI-1306, MUSI-1308, MUSI-1309, MUSI-1310, PHIL-1301, PHIL-1304, PHIL-2306, SPAN-2311, SPAN-2312;

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

Status	Course	Grade	Term	Credits
✔ Planned	ARTS-1301 Art Appreciation (050)		FA2015	3
❗ Not Started	ARTS-1303 Art History I (050)			
❗ Not Started	ARTS-1304 Art History II (050)			

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.

Programs	Progress
<input type="radio"/> Administrative Support Certificate	<input type="text"/>
<input checked="" type="radio"/> Associate of Applied Science - Entrepreneurship	<input type="text"/>
<input type="radio"/> Associate of Applied Science/Emphasis in Management	<input type="text"/>

[More...](#)


Or, choose a different program:

2D/3D Modeling Certificate

4-8 Bilingual Generalist

4-8 Eng/Lanq/Read & Social Studies

- Select a program the student is interested in
- Click **View Program**



Tenacious Test
Student ID: 0217966
✉ cmoore@com.edu

Review Complete

Advisor(s): Alexis Vance, Tanya Crump

Course Plan
Timeline
Progress
Course Catalog
Notes
Plan Archive
Test Scores
Unofficial Transcript

◀ ▶

Computer Aided Drafting Certificate

(4 of 4 programs)

×
+
View a New Program

Load Sample Course Plan

⚠ Student is not enrolled in this program. The display of this program information is temporary and it will be removed as you leave or refresh this page.

At a Glance

Cumulative GPA: ❗ 0.000 (2,000 required)

Institution GPA: ❗ 0.000 (2,000 required)

Majors: CAD Drafting

CCDs: Certificate 15-42 Hours

Departments: Drafting

Catalog: 14-15

Description

Program Notes
[Show Program Notes](#)

📌 Program Completion must be verified by the Registrar.

Progress

Total Credits (12 of 16)

16

Total Credits from this School (12 of 8)


12

Requirements

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



Tenacious Test
Student ID: 0217966
✉ cmoore@com.edu

Review Complete

Advisor(s): Alexis Vance, Tanya Crump

Course Plan
Timeline
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Course Catalog
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Plan Archive
Test Scores
Unofficial Transcript

◀ ▶

Credit Fall 2015

-
+

Remove Planned Courses

Planned: 9 Credits
Enrolled: 0 Credits
Waitlisted: 0 Credits

List

Calendar

Approve
Deny
Protect
Unprotect

Select	Approval	Course	Credits	Instructor	Time	Location
<input type="checkbox"/>		ACCT-2302: Prin of Managerial Accounting ⚠ ACCT 2301 - Must be completed prior to taking this course.	3	No Section Selected	No Section Selected	No Section Selected
<input type="checkbox"/>		ACNT-1303: Introduction to Accounting I	3	No Section Selected	No Section Selected	No Section Selected
<input type="checkbox"/>		BUSI-2301: Business Law	3	No Section Selected	No Section Selected	No Section Selected

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.

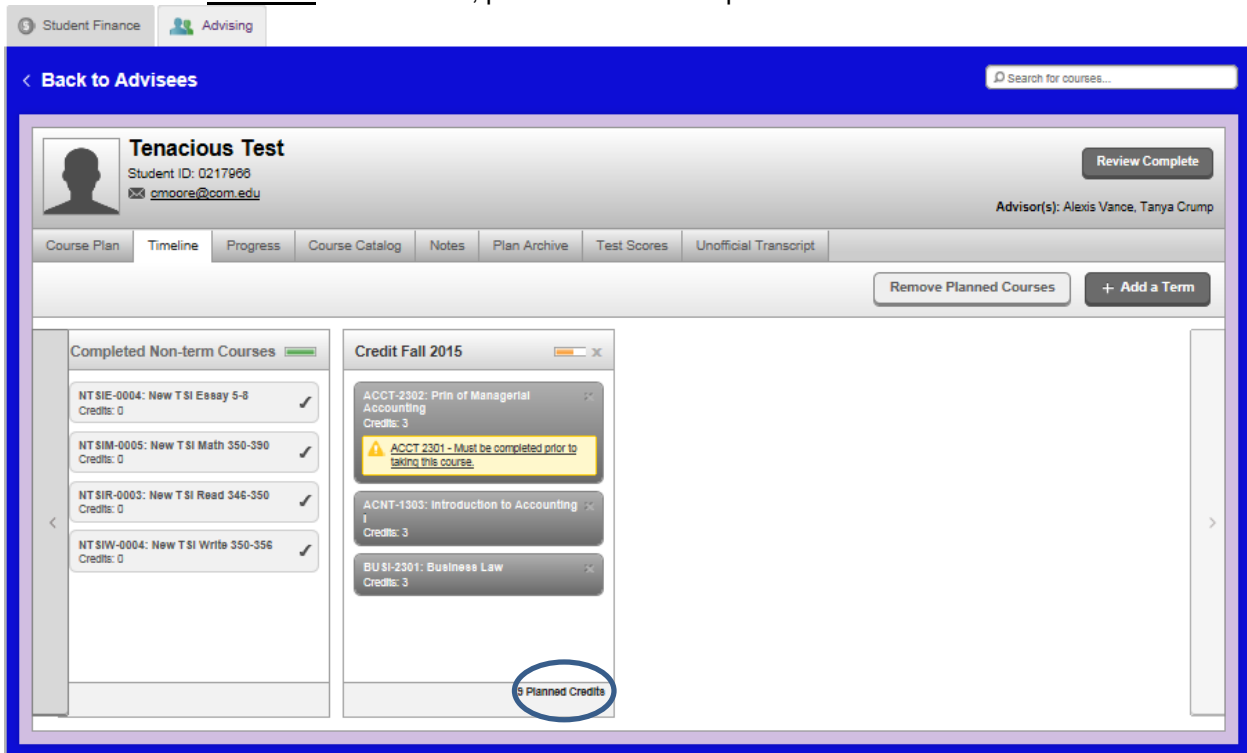
Student Planning will give a warning that a prerequisite or co-requisite exist for a course if it is not currently planned, in progress or completed.

select	Approval	Course	Credits	Instructor	Time	Location
<input type="checkbox"/>		ACCT-2302: Prin of Managerial Accounting ⚠️ ACCT 2301 - Must be completed prior to taking this course.	3	No Section Selected	No Section Selected	No Section Selected
<input type="checkbox"/>		ACNT-1303: Introduction to Accounting I	3	No Section Selected	No Section Selected	No Section Selected
<input type="checkbox"/>		BUSI-2301: Business Law	3	No Section Selected	No Section Selected	No Section Selected

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.



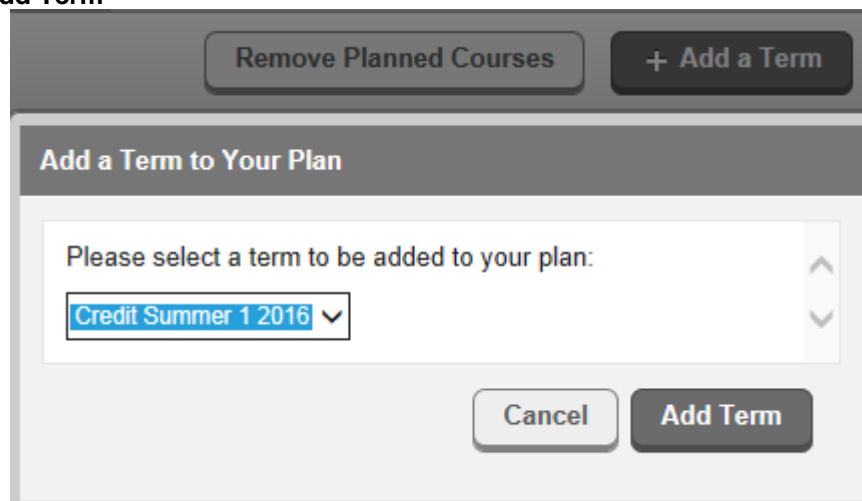
The number of planned, enrolled or completed credits appear at the bottom of each term. The GPA appears if the term is completed.

On the **Timeline** view, we can remove planned courses.

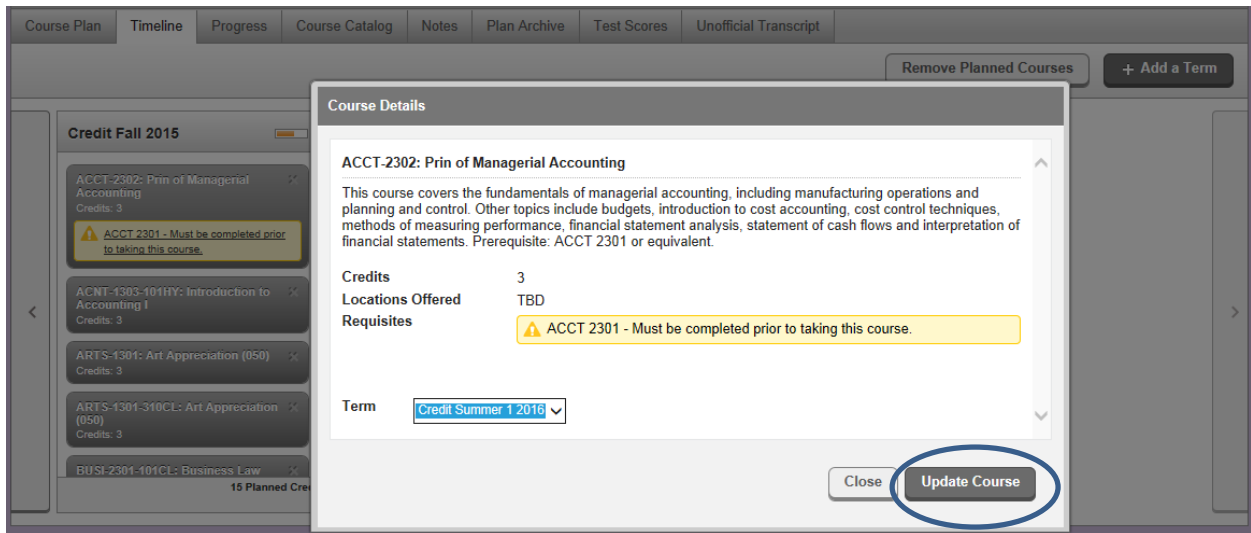
To remove all planned courses, select **Remove Planned Courses** and choose the term. You cannot undo this option, so be careful!

To move courses from term to term:

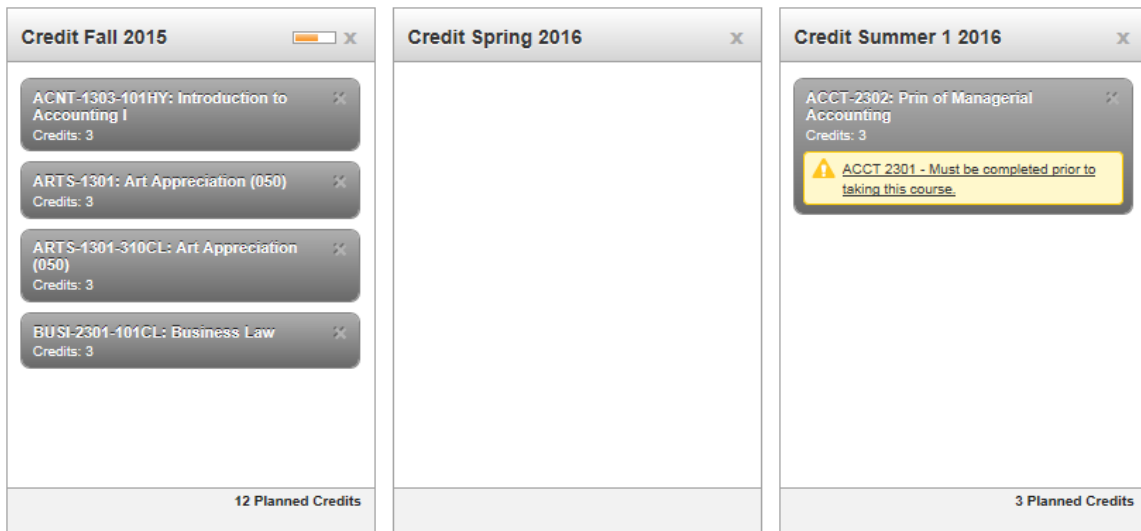
- Add a future term if it not displayed on the timeline:
 - Click **Add a Term**
 - Select a term to add to plan
 - Click **Add Term**



- 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.

Tenacious Test
 Student ID: 0217966
 Email: cmoore@com.edu

Review Complete

Advisor(s): Alexis Vance, Tanya Crump

Course Plan | Timeline | Progress | **Course Catalog** | Notes | Plan Archive | Test Scores | Unofficial Transcript

Search for a course subject:

- ABE Essay Exit
- Abe Math Diagnostic
- ABE Math Exit
- ABE Reading Diagnostic

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.

Course Plan | Timeline | Progress | Course Catalog | Notes | Plan Archive | Test Scores | Unofficial Transcript

Credit Fall 2015

Planned: 12 Credits | Enrolled: 0 Credits | Waitlisted: 0 Credits

Remove Planned Courses | Register Now

List | **Calendar**

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8am		ARTS-1301-310CL		ARTS-1301-310CL			
9am							
10am							
11am			BUSI-2301-101CL	ACCT-2302-101CL			
12pm					BUSI-2301-101CL	ACCT-2302-101CL	
1pm							
2pm							
3pm							
4pm							

(050) Seats Available: 25
 Instructor: Bowes, G
 Time:
 Dates: 8/24/2015 - 1/8/2016
 Location: Internet Course Internet INT (Internet Lecture)

ARTS-1301-310CL: Art Appreciation (050)
 Seats Available: 25
 Instructor: Peet, C
 Time: MW 7:30 AM - 8:50 AM
 Dates: 8/24/2015 - 1/8/2016
 Location: COM Main Campus Fine Arts Bldg. 133 (Lecture)

This section is full

ARTS-1301-VCT1: Art Appreciation (050)
 Seats Available: 0
 Instructor: Faculty, C
 Time:
 Dates: 8/24/2015 - 1/8/2016
 Location: Midland College Internet INT (Internet Lecture)

BUSI-2301: Business Law

View other sections

1 of 1

Select the chosen sections on the left.

Section Details

PTAP-1110-TMC: Introduction to Patient Care
Fall Semester 2016

Instructors Kraus, J
Meeting Information MWF 10:00 AM - 12:00 PM
 8/15/2016 - 12/15/2016
 Lester B. Pearson Hall 301 (Lecture)

Dates 8/15/2016 - 12/15/2016

Seats Available Unlimited

Credits 1
Grading Graded

Requisites None

This course introduces basic information regarding the health care system in general and the profession of

Click **Add Section to Schedule**

If the registration period is open and the course is approved, Click **Register Now**.

Credit Fall 2015 Remove Planned Courses

Planned: 15 Credits Enrolled: 0 Credits Waitlisted: 0 Credits

List Calendar

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
7am							
8am		ARTS-1301-310CL		ARTS-1301-310CL			
9am							
10am							
11am			BUSI-2301-101CL		BUSI-2301-101CL		
12pm							
1pm							
2pm							
3pm							
4pm							

ACCT-2302: Prin of Managerial Accounting

Denied

ACCT-2301 - Must be completed prior to taking this course.

[View other sections](#)

ACNT-1303-101HY: Introduction to Accounting I

Approved

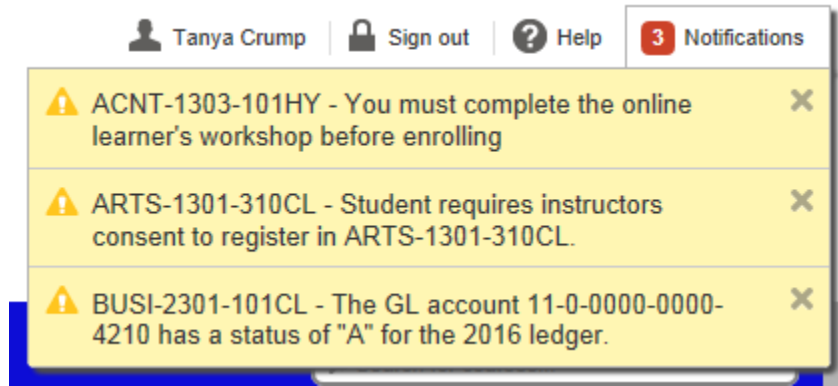
Planned

Credits: 3
 Grading: Graded
 Instructor: Williams, M
 8/24/2015 to 1/8/2016
 Seats Available: 25

[Meeting Information](#)

[View other sections](#)

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



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

The screenshot shows a registration interface for 'Credit Fall 2015'. At the top, it displays 'Planned: 12 Credits', 'Enrolled: 3 Credits', and 'Waitlisted: 0 Credits', along with a 'Register Now' button. Below this is a navigation bar with 'List' and 'Calendar' options. The main area is a calendar grid with days of the week (Sun-Sat) and times (6am-3pm). Two sections are highlighted with blue boxes:

- ARTS-1301-310CL: Art Appreciation (050)**: Status 'Planned' (yellow background). Details include Credits: 3, Grading: Graded, Instructor: Peet, C, 8/24/2015 to 1/8/2016, Seats Available: 25. A 'Register' button is visible.
- BUSI-2301-101CL: Business Law**: Status 'Registered' (green background). Details include Credits: 3, Grading: Graded, Instructor: De Los Reyes, R, 8/24/2015 to 1/8/2016. A 'Drop' button is visible.

The calendar grid shows the following section placements:

- ARTS-1301-310CL (Planned) on Monday 8am and Wednesday 8am.
- BUSI-2301-101CL (Registered) on Tuesday 11am and Thursday 11am.

Once registered, drop a section by clicking **Drop** button on that particular section.

Register and Drop Sections

You have elected to drop: BUSI-2301-101CL (3 Credits)

Select sections to drop:

- BUSI-2301-101CL (3 Credits)

Select sections to add:

- ACNT-1303-101HY (3 Credits)
- ARTS-1301-310CL (3 Credits)

Cancel Update

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

The section returns to a **Planned** status.

BUSI-2301-101CL: Business Law

✓ Planned

Credits: 3
Grading: Graded
Instructor: De Los Reyes, R
8/24/2015 to 1/8/2016
Seats Available: 25

> Meeting Information

Register

> View other sections

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.

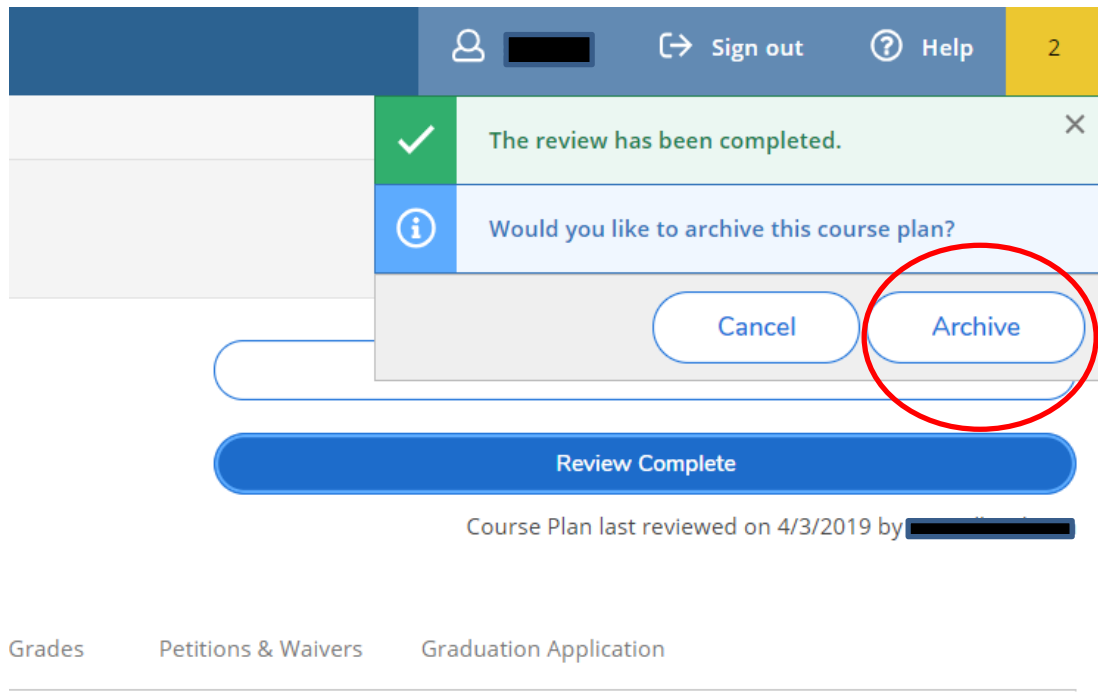
The screenshot shows the 'Notes' tab for a student named Tenacious Test (Student ID: 0217966, Email: cmoore@com.edu). The interface includes a 'Compose a Note' section with a text area and a 'Save Note' button. The 'View Note History' section displays a note from Ms. Crump dated 10/30/2015 at 8:30 PM. A 'Review Complete' button is highlighted with a blue box in the top right corner. The top navigation bar includes 'Student Finance' and 'Advising' tabs, and a search bar for courses.

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.

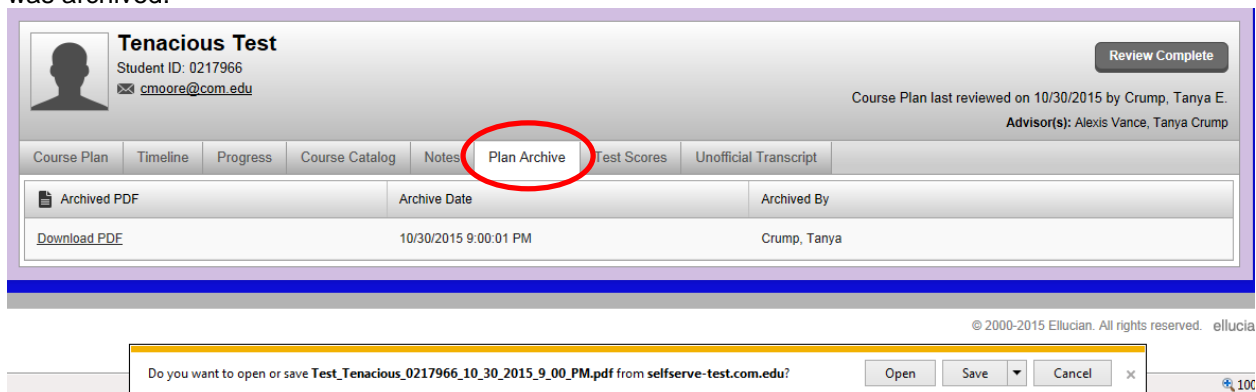
The screenshot shows the 'Review Complete' button in a student planning system. The button is highlighted with a red oval. The interface includes a 'DAEMEN' header, a search bar, and a 'Course Plan' section with a 'Timeline' tab. The 'Timeline' section shows a course plan for Fall 2018, Spring 2019, and Fall 2019. The 'Review Complete' button is located in the top right corner of the 'Course Plan' section.

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 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.

**Tenacious Test**
Student ID: 0217966
✉ cmoore@com.edu

[Review Complete](#)
Course Plan last reviewed on 10/30/2015 by Crump, Tanya E.
Advisor(s): Alexis Vance, Tanya Crump

[Course Plan](#) | [Timeline](#) | [Progress](#) | [Course Catalog](#) | [Notes](#) | [Plan Archive](#) | **Test Scores** | [Unofficial Transcript](#)

Admission Tests
No tests of this type have been recorded.

Placement Tests

Test	Date Taken	Score	Percentile	Status	Status Date
New TSI Essay	7/24/2015	5 of 8		1 Notational Only	7/24/2015
New TSI Math	7/24/2015	350 of 390	0	1 Notational Only	7/24/2015
New TSI Reading	7/24/2015	350 of 390	0	1 Notational Only	7/24/2015
New TSI Writing	7/24/2015	350 of 390		1 Notational Only	7/24/2015

Other Tests

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 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.