Using Student Planning to Advise Students

Overview

Student Planning is a great tool for students to track and plan academic progress here at Saint Peter's University.

As an advisor, you can use this tool to view what courses your student has already taken, which courses they need to complete in their program, and after meeting with them and reviewing their proposed plans, approve, deny, or modify their planned courses for upcoming terms.

**You will use the Student Planning tool to do the following:**

1. **View your Student's Progress:** Using the Advising Tab, see the student's current program progress, and determine which courses they will need to plan your meeting with them.
2. **Review your Student's Plan:** Following your meeting and your student's **request for a review,** approve, deny, or modify their planned courses.
3. **Review Student's Requirements:** Check the student's progress and determine if they need any additional courses added to their plan.
4. **Register**: Register the student directly for course sections.
5. **Drop/Add:** Use Student Planning to drop and add course sections for a student you are advising.
6. **Print the Student's Schedule**: You can print the student's course schedule using Student Planning.
7. **Completing the Review/Archiving a Plan:** Once you have completed reviewing a student, marking their advising as complete, and informing them of approvals./denials/changes.
8. **Fastest Paths:** This is an additional feature that lets you compare your student's progress in their current program with other similar programs.

Each of these steps is documented below.

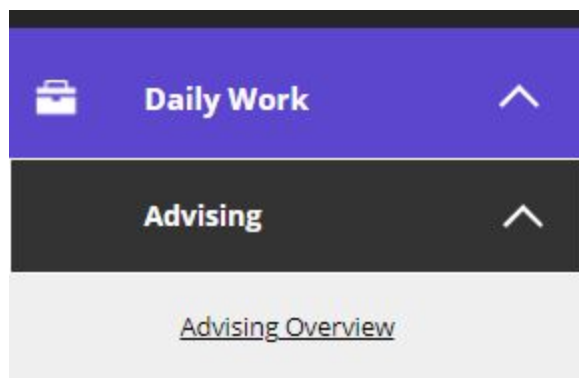## Accessing Student Planning Advising

To access Advising in Student Planning:

1. Login to Colleague Self-Service at https://selfsvc.saintpeters.edu/Student
2. If you have not already done so, you will be prompted to sign in. Use the same user name and password that you use for SPIRIT Online, Blackboard, etc. **NOTE: If you are idle for 24 minutes or more after logging in, you will automatically be logged out and will need to sign in again.**
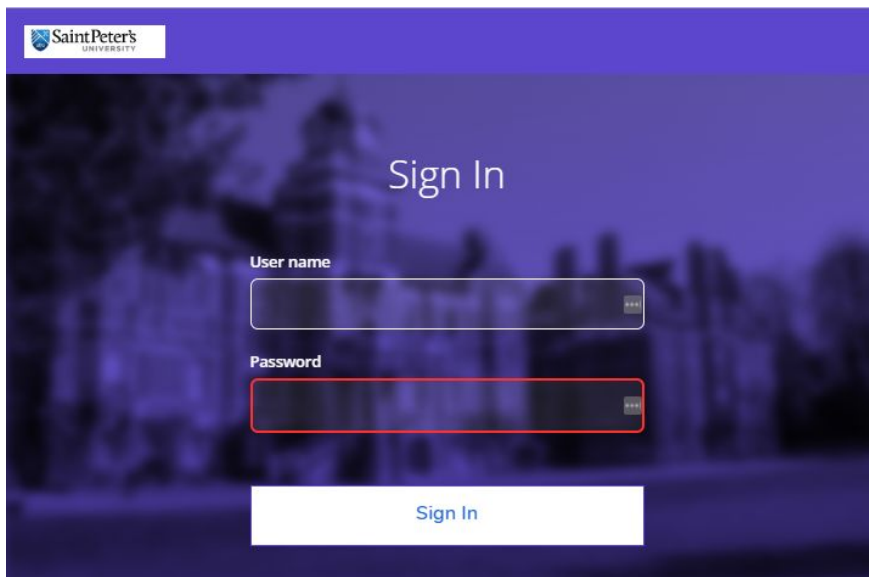
3. You can get to **Advising** by clicking the "Advising" button directly on the main menu.
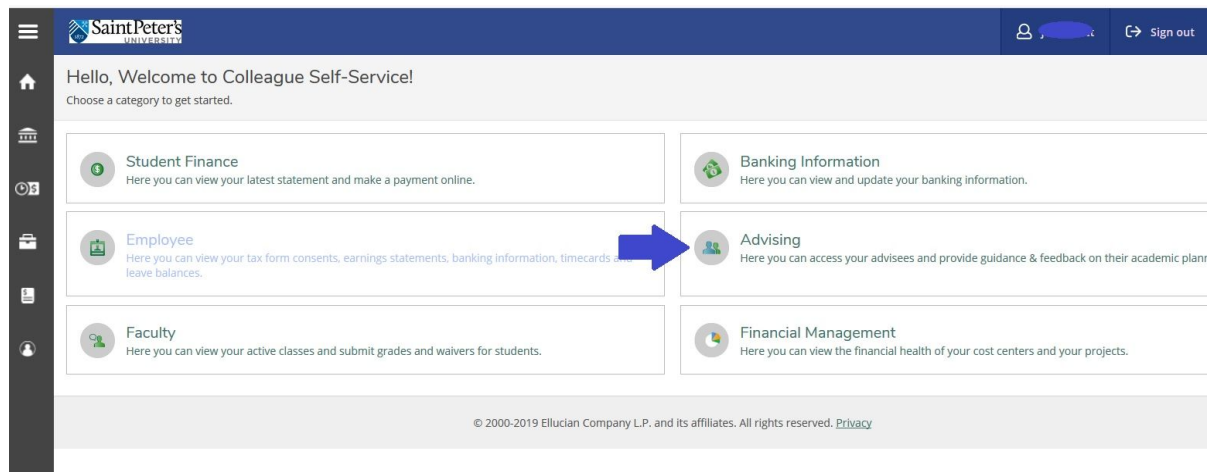
OR, you can access it from the Left Menu. If you are accessing from the Left Menu, click "Daily Work", "Advising", and then "Advising Overview."

Note: If you do not see the links to the Advising Tab in SpiritOnline, please email servicedesk@saintpeters.edu.

Using Advising on Student Planning

After logging in and clicking on the Advising tab, you will see a list of all of your advisees appear. Advisees who have requested a review will appear at the top, and below this, other advisees will appear in alphabetical order. This screen also displays the student's preferred pronoun, and whether they have had an advisement completed previously.

You have one or more advisees who have requested a review. ✕

Who would you like to work with?
Find a student by searching or selecting below.

○ Student
○ Advisor

Type a name or ID... 🔍

	Name	Review Requested	Assigned Advisee	ID	Program(s)	Date of last advisement
	Ammmmmenson, Roar! Use my name as pronoun	✓	👥	0470253	BSBA in Healthcare Management	Last advising date: **2/4/2019**
	Ejypo, Bob N. He/Him/His	✓	👥	0919437	Bachelor of Arts in Elementary Education	Last advising date: **N/A**
	Majors, Elem Ed B. She/Her/Hers	✓	👥	0920227	Bachelor of Science in Biology Bachelor of Arts in Elementary Education	Last advising date: **N/A**

Click the name of an advisee to view their progress and plans. You may also choose to search the list, by typing out the first few letters of their name in the search bar (or, you may search by Spirit ID#)

○ Student
○ Advisor

Type a name or ID... 🔍

✉ Email All My Advisees

Viewing Your Student's Progress

After selecting a student to view, you will see the student's information, and beneath this, several tabs that allow you to view different components of that student's academic history and planned courses.
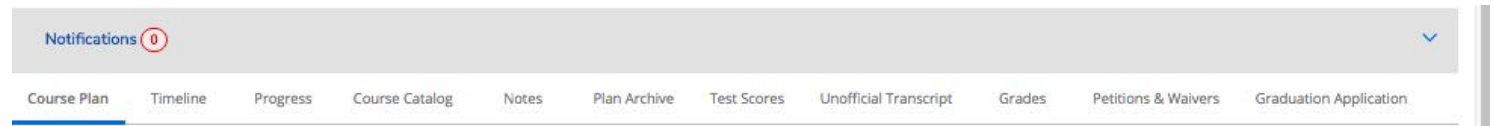
Course Plan: Contains the student's planned courses and registered courses. in the advisor view, you will be able to approve/deny/and lock/unlock planned courses. There's 2 different subtabs - the "list" subtab and the "calendar" subtab (which is what the student sees in their "Schedule" view in Student Planning). Here, you can add/drop/register course sections for that student.
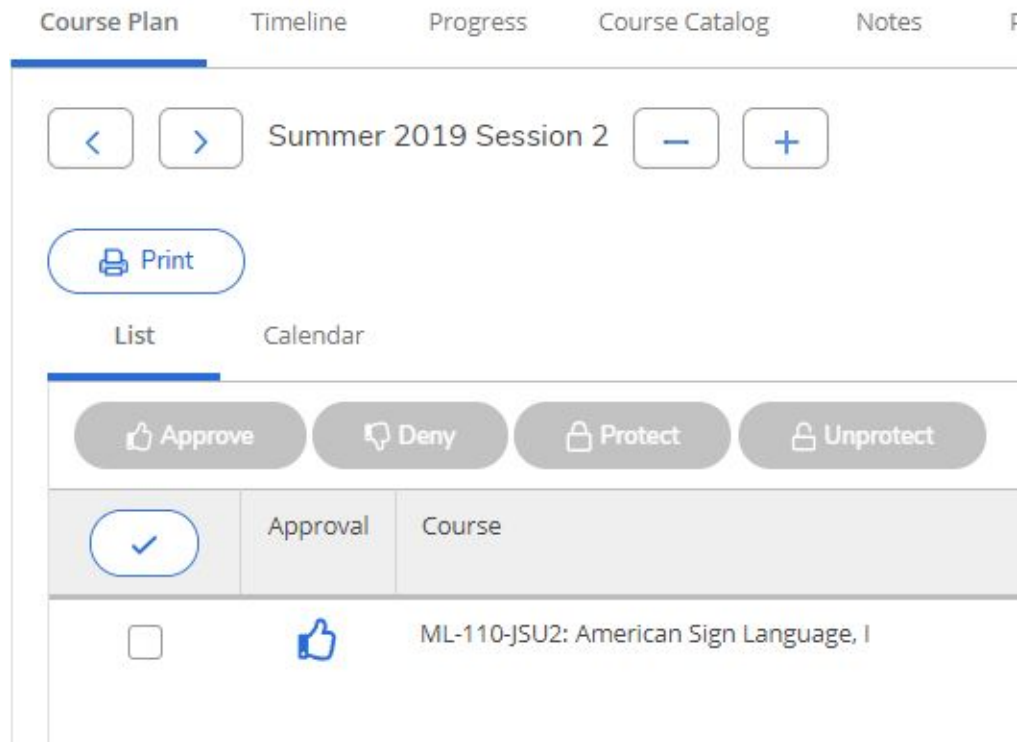
Timeline: This provides a "quick glance" at the student's past, current and upcoming terms, as well as the courses and sections within.
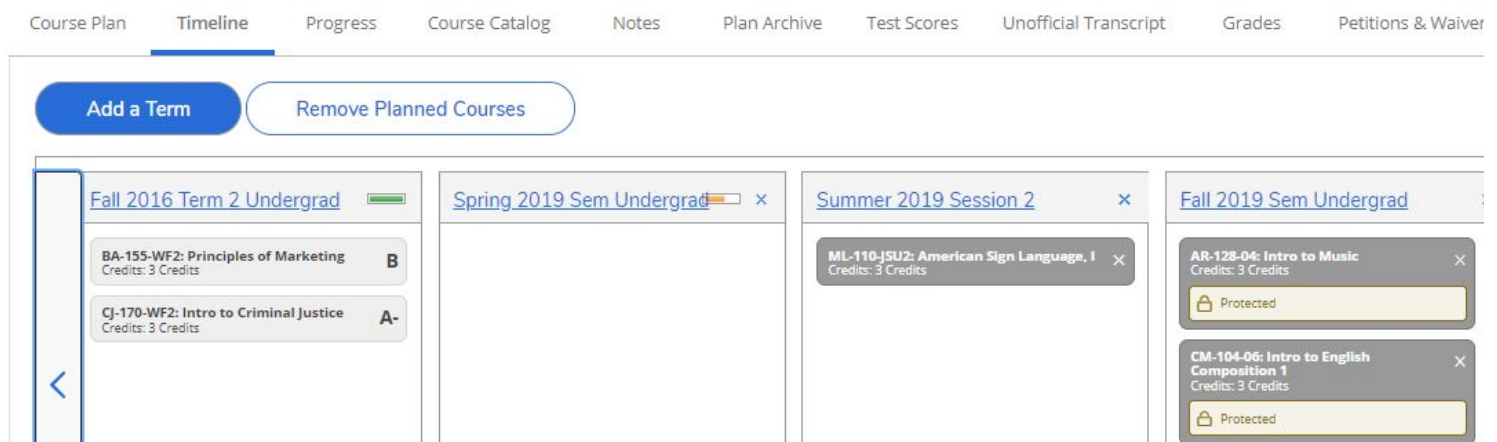
Progress: Contains the student's progress through their current program - this is also what the student sees in their "My Progress" area in Student Planning.

Course Catalog: Allows you to search for courses and sections using a variety of filters, to add to your student's plan.

Notes: Any notes your student has supplied when requesting their review appear here. This also allows you to add a note for your student. If a student has multiple advisors, they can all see the notes that have been shared.

Plan Archive: After you have completed your review, you can choose to archive the plan that was reviewed. Archived plans can be found here as PDF files. They contain the details of the student's plan, what was approved/denied/registered/completed, as well as any notes the student included when requesting review.

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

Archived PDF	Archive Date	Archived By
📄 Download	2/26/2019 12:16:24 PM	Dietz, Barbara
📄 Download	2/26/2019 12:13:59 PM	Dietz, Barbara
📄 Download	2/4/2019 3:56:01 PM	Dietz, Barbara

Test Scores: Where you can see results of a student's Admission, Placements, or other non-course related tests.

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

Admission Tests

Test	Date Taken	Score	Percentile	Status	Status Date
SAT Critical Reading	4/1/2006	410 of 800		✓ Accepted	1/3/2007
SAT Critical Reading	10/1/2006	430 of 800		✓ Accepted	1/3/2007
SAT Critical Reading	11/1/2006	450 of 800		✓ Accepted	1/3/2007

Unofficial Transcript: This hosts the student's current unofficial transcript in PDF format.

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

⚠ These documents are unofficial and do not replace the official signed and sealed transcript provided by the registrar.

📄 Undergraduate Transcript

Grades: Shows the GPA and Attendance, Midpoint and Final grades of all official courses for the student.

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

Fall 2016 Term 2 Undergrad (10/26/2016-12/20/2016)
Term GPA: 3.350

Course Section	Title	Credits	Final Grade	Midterms			
				Attendance2	3	4	5
BA-155-WF2	Principles of Marketing	3	B	P			
CJ-170-WF2	Intro to Criminal Justice	3	A-	P			

Updated: January 13, 2020

Petitions & Waivers: For any course in which students are required to submit petitions or faculty/advisors are required to provide waivers, this shows these courses and their permission status.

Graduation Application: If the student has an Graduation Application, it will be accessible here.

Reviewing a Student's Plan

When a student "Requests Review", you will get an email notification - it will look similar to the example below.
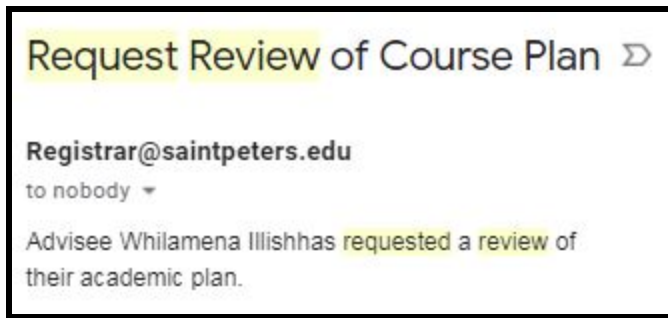
When you log into the "Advising" tab, you will see a tickmark next to that student's name, indicating that they have submitted a request for you to review them.

You will also see a notification at the upper right corner indicating one of your advisees has requested a review:
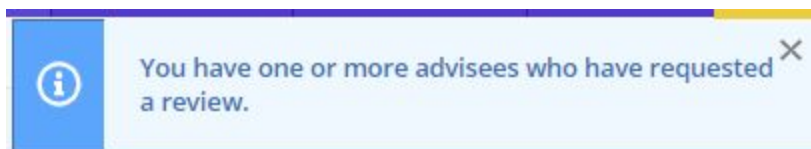
Viewing Student Requirements

In addition to being able to see the courses the student has already planned, you are able to access their current progress, and view requirements they need to fulfill.

1. Click the **Progress** tab, and scroll down. You will see all of the courses they have taken in the current program, and what courses are planned, as well as which courses are not planned/taken yet.
2. Click on any of the courses that a student has not yet taken or planned - you may select a term, and add these to your student's plan.

Updated: January 13, 2020

For example, the below student has a requirement in SPCS History - they must complete 6 credits of "HS" courses - none of which have been identified or planned yet. To find courses to plan, click the "Search" button on the right.

Spcs History

Complete the following item. ⚠ **0 of 1 Completed.** Hide Details

A. History

Complete 6 credits from subject HS:
Complete all of the following items. ⚠ **0 of 1 Completed.** Hide Details

⚠ **0 of 2 Courses Completed.** Hide Details

Status	Course	Search	Grade
ⓘ Not Started			

This will show all courses that fit this requirement. You can choose to filter further using the options on the left, or scroll down and select a course by clicking "Add Course to Plan"

Course Plan	Timeline	Progress	Course Catalog	Notes	Plan Archive	Test Scores	Unofficial Transcript	Grades	Petitions & Waivers	Graduation Applic...

‹ Back To Course Catalog

Filter Results

The following results match requirement: Complete 6 credits from subject HS:
Filters Applied: None

Availability ⌃
☐ Open Sections

Subjects ⌃
☐ History (39)

Locations ⌃
☐ Jersey City Campus (8)
☐ Web Online (2)

Show All Terms ⌃
☐ Fall 2019 Sem Undergrad (6)
☐ Summer 2019 Session 2 (2)
☐ Summer 2019 Session 1 (1)

Days of Week ⌃
☐ Monday (6)
☐ Tuesday (6)
☐ Wednesday (6)
☐ Thursday (6)

HS-121 The Western Tradition (3 Credits)   [Add Course to Plan]
An examination of the origins of early modern history with a special focus on Western civilization.
Requisites:
None

View Available Sections for HS-121   ⌄

HS-122 World Perspectives in History (3 Credits)   [Add Course to Plan]
A chronological continuation of HS-121 with a greater emphasis on global developments.
Requisites:
Requisite with no print text exists - Must be completed prior to taking this course.

View Available Sections for HS-122   ⌄

HS-123 Special Topics in History (3 Credits)   [Add Course to Plan]
An examination of various topics which have significantly impacted the history of the world from the eighteenth century to the present.

After clicking "Add Course to Plan", you will see a description of the course, including any requisites it has. Select a term you would like the student to take this in, and then click "Add Course to Plan".

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Course Details

HS-339 History of Germany, 1815-1945
A survey of German history from the Napoleonic Era to the collapse of the Nazi regime. Modern Western History.

Credits	3
Locations Offered	TBD
Requisites	⚠ Take HS-121 and HS-122 or HS-123; - Must be completed prior to taking this course.
Term	Select a Term... ▾

Close	Add Course to Plan
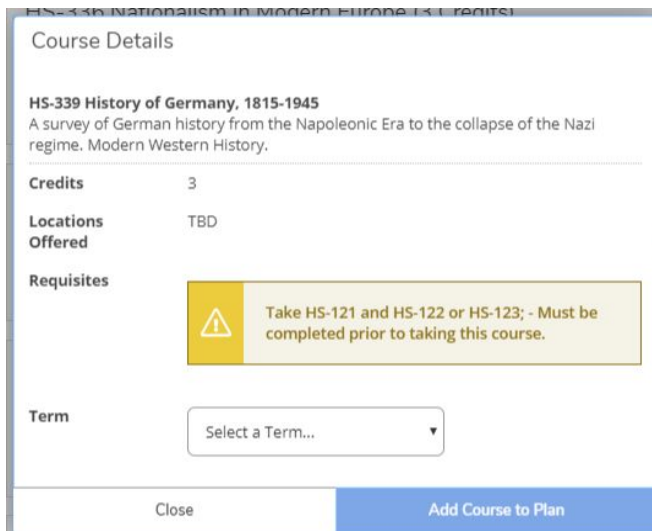
Completing the Student's Review

Once you have carefully reviewed a student's plan, and identified any other courses you wish to be added to that plan:

1. Access the "**Course Plan**" tab, and make sure you are in the "List" subtab. Navigate to the upcoming term.
2. The first tab you land on (Course Plan) will allow you to see their planned courses for the current term, and includes 4 buttons - "Approve", "Deny", "Lock" and "Unlock"

   a. Approve - this lets the student know that they can go ahead and register for a section of this course.
   b. Deny - this lets the student know they can not register for a section of this course. If you "deny" a course that a student has planned, they will be unable to proceed with registering for it.
   c. Lock - this prevents a course from being removed or moved within the student's timeline.
   d. Unlock - removes the above restriction on any "locked" course.
3. Tick the courses that you would like to Approve, and then click the "approve" button.
4. Tick the courses that you would like to Deny, and then click the "deny" button.
5. If there are any courses you would like to Lock, tick these, and click the "lock" button. Both approved or denied courses can be "locked".

Selecting Sections for Registration

If you'd like to register students for sections, follow the steps below:

1. In the **Course Plan** tab, switch from "List" to "Calendar" view. Make sure you are in a student's upcoming term.

2. You will see the courses that are planned for this term. If sections have already been added, you will see them appear on the calendar. If not, then you will need to add a section of the course in order to register the student for it. If this is the case, click "View other sections" at the bottom of the course.
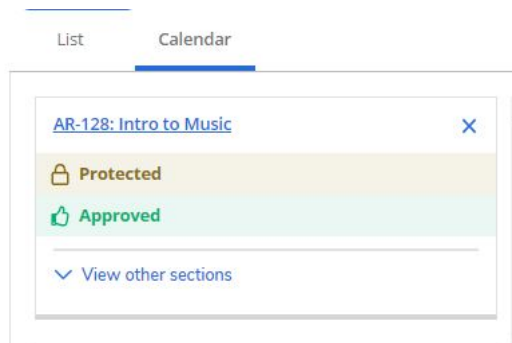
3. Possible sections appear semi-transparent, surrounded by dotted lines. As you hover over a section, it will highlight in a darker yellow on the schedule.
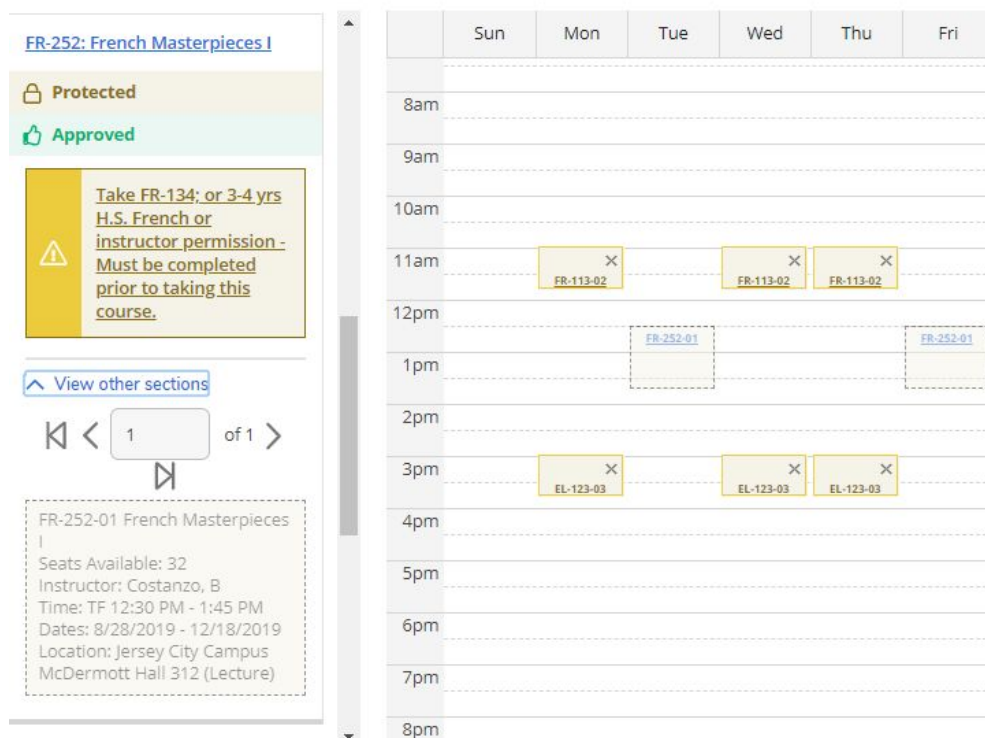
4. *To add a section to your student's plan*, click the section on the left, and you will see additional information about it, including the faculty, description, and more. Then select **Add Section.**

5. *To remove a section from your student's plan*, click the x in the top right corner of the section in the calendar.

6. *To remove a course from your student's plan*, from the left side that has the list of your planned courses, click the x in the top right corner of the course.

7. To register a student for a section, click the blue "Register" button:

Dropping/Adding Courses For Your Student

During the drop/add period, you can use Student Planning to add or drop sections for your students at any time. You can also remove students from a waitlist.

1. In the Advising tab, select a student.
2. In the **Course Plan** tab, switch from "List" to "Calendar" view. Make sure you are in a student's upcoming term.
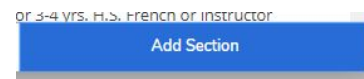1. To drop a course, click **Drop** under each course on the left side you'd like to drop. Even after you drop a course for a student, it will still appear as "Planned".

   ✓ *To remove a section from your student's plan*, click the x in the top right corner of the section in the calendar.

   ✓ *To remove a course from your student's plan*, from the left side that has the list of your planned courses, click the x in the top right corner of the course.
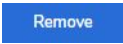
   ✓ To move the course to another term, click the course title and select a new term. You can also "drag and drop" courses from one term to another in the "Timeline" tab.

3. To be remove the student from a waitlist, click **Drop Waitlist**.
4. To add a course/section, follow the directions in the "Selecting Sections for Registration" part of this guide.

Removing a Student's Planned Courses

Once your student has successfully registered, they may end up with remaining planned courses on the calendar that they did not end up registering for. To remove those planned courses:

1. In the **Course Plan** tab, switch from "List" to "Calendar" view. Make sure you are in a student's upcoming term.
2. In the top right corner, click **Remove Planned Courses**.
3. When asked if you are sure, click **Remove** again.
4. Only the courses the student is registered or waitlisted for will remain on your student's schedule.

Printing Your Student's Upcoming Term Course Schedule

Once sections are added and registered, you can print your student's schedule from the **Calendar** view.

1. In the **Course Plan** tab, switch from "List" to "Calendar" view.
2. Navigate to the term you want to print.
3. Click the **Print** button at the upper left.   ⊟ Print

Completing the Review and Archiving a Plan

Once you are satisfied with your student's plan, and have made all necessary changes/suggestions, you can complete the review.

Advisement Complete

Review Complete
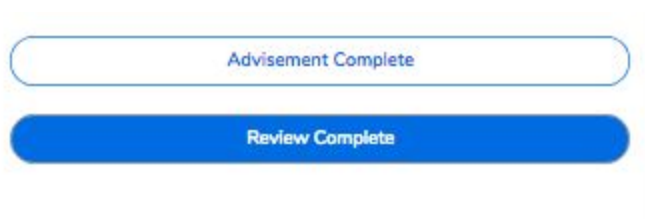
1. At the upper right, select "Advisement complete" This will generate correspondence to the student to let them know that the advisement session has been completed, and will provide a timestamp that you can observe on your list of advisees.

2. Below this, click "Review Complete".

3. You will be asked if you would like to archive the plan. Click "Yes", and this record will be added to the "Plan Archive" tab.

    a. You can use the Plan Archive tab to produce a printable PDF of any plans you have archived for that student. This includes indication of all courses that were approved/denied, registered, planned, as well as the student's notes to you.

Fastest Paths

"Fastest paths" is an additional feature that allows you to look at other programs and see how your student's progress would be if they switched to that program. Think of it as a "What if" scenario - if your student is considering choosing an alternate program, but you want to see how the courses they have already taken/planned would apply, this is where you can view this information.

1. Go to the **Progress** tab.
2. At the upper right, click the "View a New Program" button.
3. Programs similar to the one the student is enrolled in will appear, and show you how much progress the student would have in these programs if enrolled. You may select one of these, or search, or scroll down to locate a program you are interested in comparing. Click "View Program" to load the new program.
4. You will see the program you selected appear. At the upper left, you will see a notification indicating that this appears only temporarily for your comparison - and you can switch back to your original program by clicking

the arrows at the far upper left, or click the X to remove this program.

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

< > Bachelor of Science in Health and Physical Education (x)
(3 of 3 programs)

ⓘ 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.

5. As you scroll down, you will see all of the courses your student is already registered for/have completed/have planned, in the context of that new program you have selected. When you are done viewing this, simply navigate to a different area, and the "new program" will be removed.

Getting Help

If you experience any difficulties using Advising or any other features of Student Planning, please contact Client Services at (201) 761-7800 or via e-mail at servicedesk@saintpeters.edu or the Student Planning Team at studentplanning@saintpeters.edu

STUDENT PLANNING:
FREQUENTLY ASKED QUESTIONS (FAQs) for ADVISORS

How do I access Student Planning?

Student Planning can be accessed by visiting Spirit Online and clicking on the Student Planning link or directly using this link https://www.selfsvc.saintpeters.edu/Student. Please use your network credentials.

Do I need to be on campus to access Student Planning?

No, Student Planning can be conveniently accessed from any device, on or off-campus.

A particular advisee does not appear when I view Student Planning. How do I get them added as my advisee?

If a student is not appearing that should be, send an email to registrar@saintpeters.edu with the students name and ID requesting that the student is added as your advisee.

How do I review my advisees courses or plan for the upcoming term?

Access the Course Plan tab, then select either "Approve", "Deny", "Protect" and "Unprotect"
   a. Approve - this lets the student know that they can go ahead and register for a section of this course.
   b. Deny - this lets the student know they can not register for a section of this course. If you "deny" a course that a student has planned, they will be unable to proceed with registering for it.
   c. Protect - this prevents a course from being removed or moved within the student's timeline.
   d. Unprotect - removes the above restriction on any "protected" course.

Courses that have been approved or denied can be "locked".

Are students able to register for courses that were not approved by advisors?

No, if a course is not approved, the student will not be eligible to enroll in the course.

How do students enroll in a course that is closed?

If a section is closed, the student can be added to the Waitlist (which appears instead of the register button, when a section is closed. Students can add themselves to the waitlist.

How do students drop a course after registering for it?

To drop a course, click on course plan, then calendar view, then review the course you would like to drop (on the left) and click "Drop"

How do I move a student to the top of the waitlist?

To maintain the waitlist, you must use SWLM in Colleague to grant students a higher rating or select "E" to enroll the student.

A seat is available on the waitlist. How does the student move from the waitlist into the course?
The Registrar's office has setup an automated process that runs hourly and will enroll students from the waitlist into the course, provided they have met all the prerequisites. If you notice the student is still on the waitlist after a few hours, please contact the Registrar's office to see what the issue is. It could be a prerequisite, restriction, or there are no available seats.

Can all advisors view the students plan?
If the student has more than one advisor, all advisors have access to the students courses and plan.

Can I send a private note to the student?
The notes area is public and available to all advisors. If you would like to send a private message to the student, you should email them.

What if the academic requirements listed at not accurate or the student has substitutions not appearing in Student Planning but they are visible in SpiritOnline?
If you notice this, please send a screenshot containing the students ID# and the requirement that is not appearing correctly. The student planning implementation team will review and collaborate with ITS on how to correct the academic evaluation.

Resources available to assist you in planning your course schedule:

- A comprehensive guide to the new registration process - [ADVISOR Student Planning Guide 2019](#).
- [Student Planning Video Tutorial for Advisors](#).
- For problems accessing the portal or if you encounter any technical difficulties, please contact the ITS Helpdesk at servicedesk@saintpeters.edu or at (201) 761-7800.
- For questions regarding your degree requirements or classes you are considering, please contact your academic advisor(s).
- General questions regarding Student Planning can be directed to the Student Planning Implementation Team at studentplanning@saintpeters.edu

I still need help. Where can I go?
If you have general questions regarding the use of Student Planning or wish to schedule a training, please contact the Student Planning Implementation Team at studentplanning@saintpeters.edu.

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