



Advising SLCM_WP_310



Course Instructions



- Click **Attachments** (upper right corner)



- Click **QRC Course Navigation pdf**



- Print the pdf
- Use the pdf to navigate the course and take the Assessments at the end of each unit

Course Content



SLCM_WP_310 is intended for faculty and staff who serve as academic advisors. The content includes accessing an advisee's academic record, viewing holds/stops, placement/removal of Advisor holds, advising contact – notes & course recommendations, student booking (registration windows), viewing transfer work, and admitted program of study & major/minor.

- Introduction
- Unit 1 – Advising
- Summary

Learning Objectives



- Upon completing this course, participants will be able to:
 - ♦ Search for a student and student record
 - ♦ View holds and stops
 - ♦ Place and remove advisor holds
 - ♦ Create contact notes
 - ♦ Review student booking
 - ♦ View transfer work
 - ♦ View admitted program of student, major and minor

Prerequisites and Roles



- In order to access advising, the user needs:
 - ♦ To complete the **SLCM_WP_310 Advising** course and pass the assessment
 - ♦ To be designated as a person with the responsibility for lifting advisor holds
 - ♦ To sign the Statement of Responsibility (SOR)
 - Instructions available at:
http://www.uky.edu/IRIS/train/SOR_Information.html
 - If you have signed the SOR in UK_100, you do not need to sign it a second time
- If you do not have access, please work with your college contact to get this access assigned
 - ♦ The college contact list is located at
http://www.uky.edu/IRIS/CM/cm_group.html

Unit 1



Advising

Unit 1 – Advising



- Advisor Holds
- Advisee Records
 - ♦ Schedules
 - ♦ Addresses
 - ♦ Holds/Stops
 - ♦ Unofficial Transcripts
 - ♦ Program of Study and Major
 - ♦ Anticipated Graduation Date

Accessing an Advisee Record



- The advisee record is located on the *myUK* portal under **Student Administration > Advising Services > Advisee Record**.



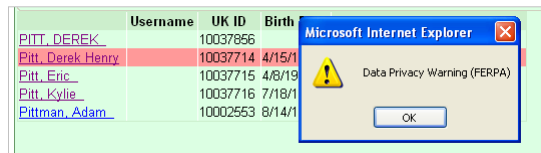
FERPA



- Under the Family Educational Rights and Privacy Act (FERPA), a student can request that their directory information not be shared.
- This means absolutely no information can be released on this student without proper authorization and ID.
- You may still access the data if you have a professional need to know.

	Username	UK ID	Birth Date	
PITT_DEREK		10037856		
Pitt, Derek Henry		10037714	4/15/1987	Data Privacy Warning (FERPA)
Pitt, Eric		10037715	4/8/1987	
Pitt, Kylie		10037716	7/18/1980	

- When you select the student, a message box will appear.



Student Search



- To open a student record for a student who appears on your advisee list, just click on the student's name

	Username	UK ID	Birth Date	
PITT_DEREK		10037856		
Pitt, Derek Henry		10037714	4/15/1987	Data Privacy Warning (FERPA)
Pitt, Eric		10037715	4/8/1987	
Pitt, Kylie		10037716	7/18/1980	

- If a student does not appear on your list, you may conduct a search.
 - Click on the **Find a Student** box and complete one or more fields (**Username, Last Name, First Name, or Student Number**)

Current Student: None Selected

Search by Username:

Last Name:

First Name:

Student Number:

- Click the **Search** button

Student Number:

- Click on the student's name

PITT_DEREK				
Pitt, Derek Henry				
Pitt, Eric				
Pitt, Kylie				

Student Record Display



- ♦ A tabbed list of available information will be displayed.
 - It includes Stops/Holds, Schedule, Address, Documents (which contains the Unofficial Transcript), Program of Study, Anticipated Graduation Date, Windows/Events, and myAdvisees.

The screenshot shows the 'Advisee Record' interface. At the top, it says 'No username found for Student: 60036425'. Below that, it displays 'Current Student: Pitt, Derek Henry 0 - UKID# 10037714' with a 'Data Privacy Warning (FERPA)' and buttons for 'Open Student Selection' and 'Close'. A tabbed menu is visible with 'Stops / Holds' selected. Below the menu is a table with columns 'Stop Type', 'Contact Info', and 'Date'. The table contains two rows: 'Academic Advisor Hold - Contact your academic advisor' with 'Advisor Hold' and '2007-12-11', and 'Young Library Hold - Call 257-0500 ext. 2067' with 'Young Library Hold' and '2007-12-11'. A 'Lift Advising Hold' button is located below the table.

Stop Type	Contact Info	Date
Academic Advisor Hold - Contact your academic advisor	Advisor Hold	2007-12-11
Young Library Hold - Call 257-0500 ext. 2067	Young Library Hold	2007-12-11

Stops/Holds Tab



- **Stops/Holds** tab is the default for the Advisee Record.
- Each hold includes information about the hold.

This screenshot is similar to the previous one but highlights the 'Lift Advising Hold' button with a red circle. The table of stops/holds is also visible.

Stop Type	Contact Info	Date
Academic Advisor Hold - Contact your academic advisor	Advisor Hold	2007-12-11
Young Library Hold - Call 257-0500 ext. 2067	Young Library Hold	2007-12-11

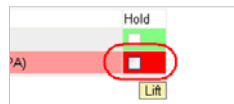
myAdvisees Tab



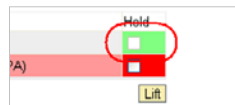
- **myAdvisees** tab provides a list of the students you advise.

Name	Username	DOB	Student #	Hold
Pat. Ivde...		7/18/1990	10037716	<input type="checkbox"/>
Pat. Derek Heroy		4/15/1987	10037714	<input checked="" type="checkbox"/> Data Privacy Warning (FERPA)

- Students with holds will display a red box in the **Hold** column.



- Students without holds will display a green box in the **Hold** column.

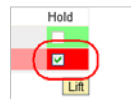


Lifting Advisor Holds

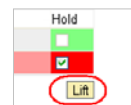


- Use the following steps to lift an advisor hold.

- ♦ Click in the red box



- ♦ Click on the **Lift** button



- ♦ **Note:** To lift the hold on a series of students, you may click more than one red box to select and click the **Lift** button to lift the hold as a group.

- ♦ **Note:** Once an Advisor Hold has been lifted, the red box becomes green.

Schedule Tab



- **Schedule** tab will display the student's current academic record.

Advisee Record | History | Back | Forward

Current Student: Clanding, Horace 0 - UKID# 10020000

Open Student Selection | Close

Stops / Holds | **Schedule** | Address | Documents | Program of Study | Anticipated Graduation Date | Windows / Events | myAdvisees

Course	Hours	Scale	Grades (Mid/Final)	Meeting Time / Location	Status
Spring 2006-2007 SW 505 Section 001 CHILD WELFARE SERVICES	3.0	Normal	*** / ***	LEC - TR 3:30 pm - 4:45 pm T80 Whitehall Classroom Bldg-Rm 241-G0	Booked
Spring 2005-2006 HIS 749 Section 001 DISSERTATION RESEARCH	0	Normal	*** / S		Completed with Success
Fall 2005-2006 HIS 749 Section 001 DISSERTATION RESEARCH	0	Normal	*** / S		Completed with Success

Address Tab



- The **Address** tab provides the student's address(es), which can include any of the following types.
 - ◆ Current
 - ◆ Permanent
 - ◆ International
 - ◆ Email

Address | Documents | Program of Study | Anticipated Graduation Date | Windows / Events | myAdvisees

Current Address:
Address: 32012 Main Street
City: Lexington
Country: US
State / Province: KY
Zip / Postal Code: 45078
Telephone:
Mobile Phone:

Permanent Address:
Address: 32012 Main Street
City: Lexington
Country: US
State / Province: KY
Zip / Postal Code: 45078
Telephone:
Mobile Phone:

International Address:
Address:
City:
Country:
State / Province:
Zip / Postal Code:
Telephone:
Mobile Phone:

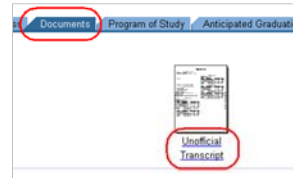
Email Address:
Official UK Email:
All official email from the University will go to this address.

Unofficial Transcript

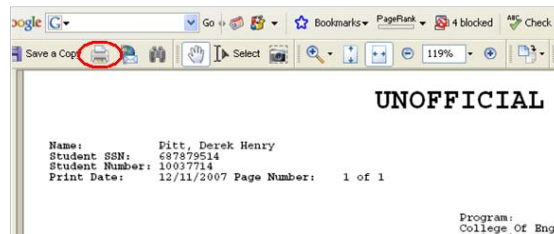


- Use the following steps to display an unofficial transcript for a student.

- ♦ Click on the **Documents** tab
- ♦ Click on **Unofficial Transcript**



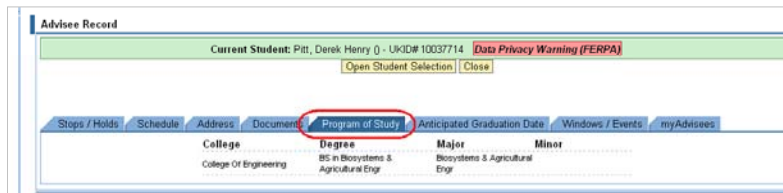
- To print the transcript, click on the **Printer** icon.



Program of Study Tab



- The **Program of Study** tab displays the student's Program(s) of Study.



- The student's College, Degree, Major, and Minor (if applicable) will be displayed.

Anticipated Graduation Date



- Use the following steps to view the student's anticipated Graduation Date.
 - ♦ Click on the **Anticipated Graduation Date** tab

- ♦ To enter an anticipated Graduation date, click on the **Update** button

- ♦ Click on the appropriate date to select

- ♦ Click **Save**

Viewing Other Records



- Use the following steps to view another student's data.
 - ♦ Click the **Open Student Selection** icon

- ♦ Enter the student's name, **Username**, and/or **Student Number** into the appropriate field

- ♦ Click the **Search** icon

Logging off myUK Portal



- When you are finished with your work in Student Administration, you will want to log off the Portal.
- Use the following steps to log off the portal.

- ♦ Click **Log Off**



- ♦ To confirm, click **Yes**



- Be sure you log out, so that no one is able to access student data using your ID!

Summary



- Advisor Holds
- Advisee Records
 - ♦ Schedules
 - ♦ Addresses
 - ♦ Holds/Stops
 - ♦ Unofficial Transcripts
 - ♦ Program of Study and Major
 - ♦ Anticipated Graduation Date



Unit 1 Assessment

SLCM_WP_310 Unit 1

Question 1 of 5

Which tab on the portal toolbar is used to access student records?

- Home
- Student Services
- Student Administration
- Student Records
- SLCM Records

PROPERTIES

On passing, 'Finish' button:

On failing, 'Finish' button:

Allow user to leave quiz:

User may view slides after quiz:

How many attempts:

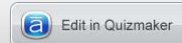
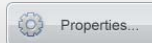
[Goes to Next Slide](#)

[Goes to Previous Slide](#)

[After user has completed quiz](#)

[At any time](#) SLCM_WP_310 Advising

[Unlimited times](#)



Help Websites



- myHelp website:
 - ♦ <http://myHelp.uky.edu/rwd/HTML/index.html>
 - ♦ Contains Quick Reference Cards (QRCs), updated course manuals, Simulations, Frequently Asked Questions, and other job aids
- IRIS website
 - ♦ <http://www.uky.edu/IRIS/>
 - ♦ Contains Information Directory, Forms, and other references

Course Summary



You are now able to:

- Access the IRIS Web Portal
- View an Advising Record
- Lift an Advising Hold
- Conduct a Student Search
- View Addresses
- View Stops
- Print an Unofficial Transcript
- View Programs of Study
- Edit anticipated graduation date

Course Evaluation



- You can provide IRIS Training with feedback on this course by completing the SLCM_AD_310 Student Records course evaluation.
- The evaluation is located at:
http://myhelp.uky.edu/rwd/HTML/SLCM/SLCM_AD_310_Evaluation.html

Course Completion Instructions



- To complete the course, click **Attachments** (upper right corner)
- Click **QRC Course Completion** and print the QRC
 - ♦ **Note:** The QRC will open in another window.
- Click **OK** to close the **Attachments** window
- Follow the steps in the QRC to complete the course

