Academic Advising in myUFL

PVO100

UF | myUFL

UF Office of Human Resource Services
Training and Organizational Development
UNIVERSITY *of* FLORIDA

Course Registration/Materials

- Additional live training sessions available at https://mytraining.ufshands.org/
    - Log in using your GatorLink username and password
    - Search for PVO100
    - Select > Register and choose one of the sessions
- Toolkits including instruction guides and simulations are available at http://hr.ufl.edu/learnandgrow/toolkits-resource-center/ under Student Information Systems

Overview

This session will cover:

- Advisee Student Center
- Audits/WHATIF Audits
- Milestones
- Reading/Writing Exceptions
- Advising Notes
- Universal Tracking

Objectives

- Recall the steps for viewing a student including degree program, student groups, milestones, service indicators, advising notes, current schedule, and past/future enrollment.
- Describe the steps for running an audit and summarize the components of the audit page.
- Summarize the steps required for reading, adding, or updating advising notes.
- Recall the steps for reading and writing exceptions on audits.
- Explain the use of the Universal Tracking (UT) term and how to change this information.

Introduction

- UF is committed to quality academic advising in order to provide academic guidance and support to students.
- Being able to view student information, read audits, and view excess hours are essential tools for advisors.
- Advisors help students:
    - Determine degree requirements
    - Change majors
    - Drop courses
    - Choose classes
    - Handle registration issues
    - Identify needed resources

- Students are responsible for tracking their academic progress to ensure timely graduation.
- Students must review their degree audit each semester to ensure they fully understand their remaining degree requirements.
- There are many items that may impact what the student and advisor can see on the degree audit.

Items on a Degree Audit

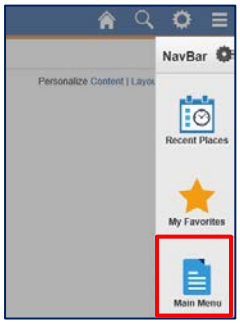
- Degree Program Participation
- Degree Attributes
- Student Groups
- Milestones
- Service Indicators
- Advising Notes
- Current Schedule
- Past/Future Enrollment

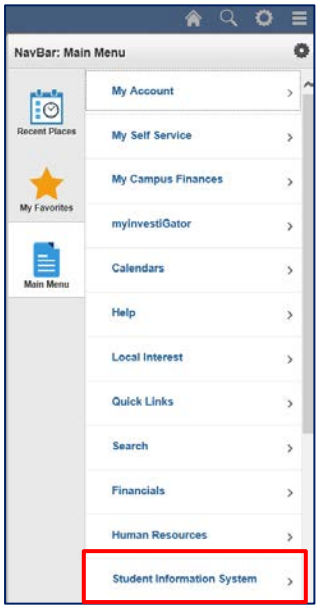
This information can be found in the Student Center

View a Student

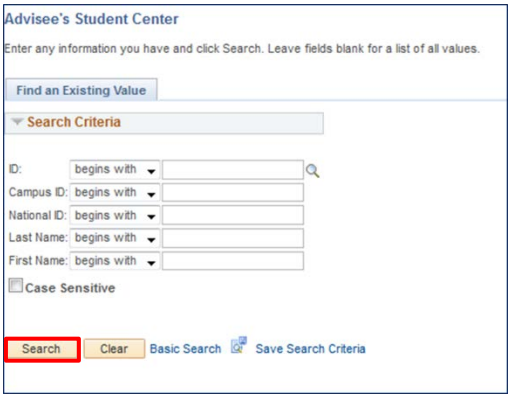
- Log into myUFL with your username and password.
- Click on the NavBar in the upper right corner.

- Navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center
  > Advisee Student Center

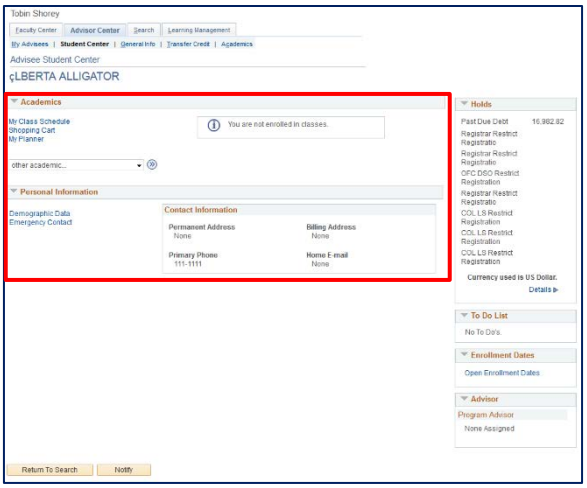




- Enter UFID or last name and first name
- Click Search



- Review Academic and Personal Information

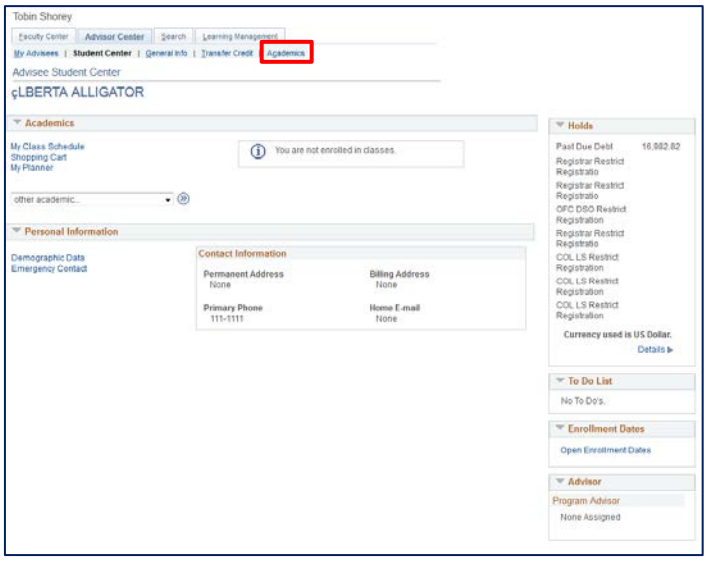


Degree Program/Attributes

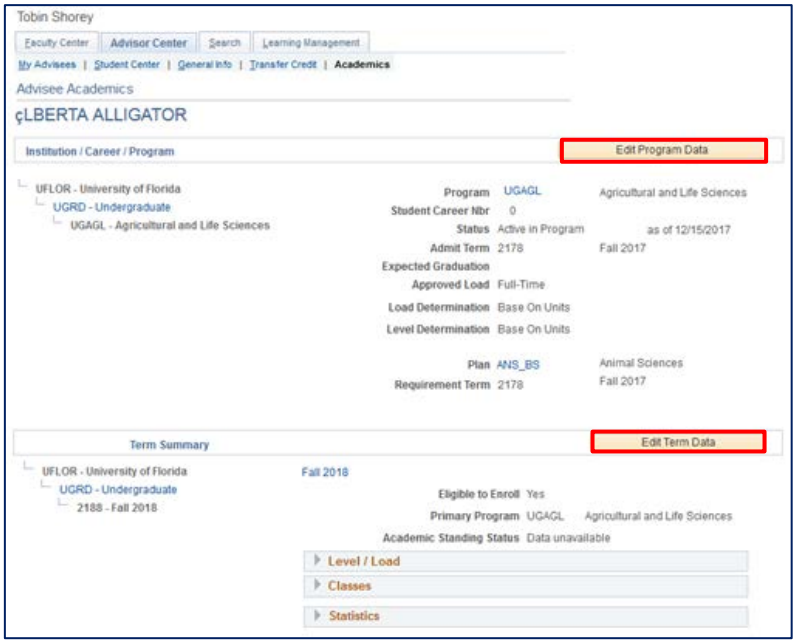
- When a student is matriculated by admissions, a Student Program/Plan record is created which includes:
    - Career
    - Program
    - Plan
    - Sub-Plan
- Additional training related to Student Program/Plan may be found at: http://hr.ufl.edu/learnandgrow/toolkits-resource-center/student-information-systems/.
- In order for a student's majors, minors, and certificates to appear on the degree audit, they must be in "Active" status on the student's Student Program/Plan stack.

Status = Active in Program

- Navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center
  > Advisee Student Center
- Click on the Academics Tab



- "Edit Program Data" will not be available if you are not authorized to change student majors (Student Program/Plan) or catalog year (Requirement Term).



Student Groups

- Any identified group to be tracked

- Can be used to manage:
    - Enrollment
    - Immunization requirements
    - Mandatory health insurance requirements
- Will impact what a student sees when they view their degree audit

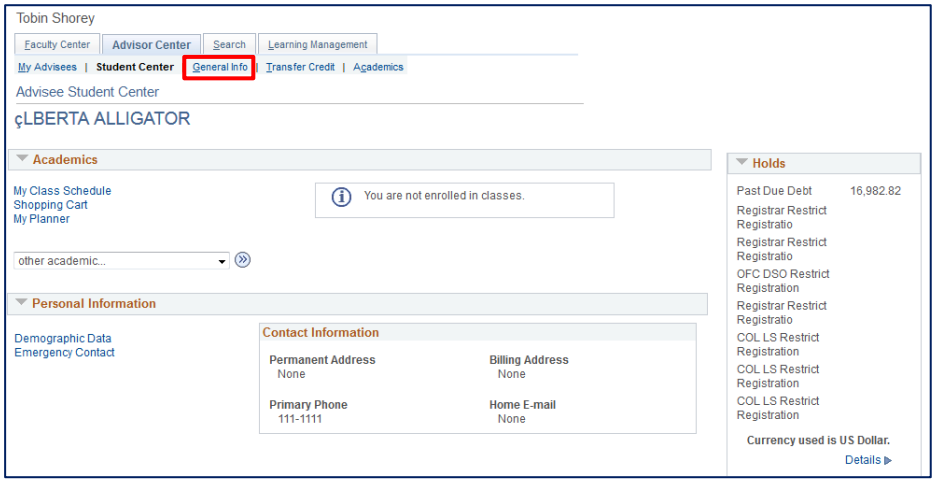
Student Group Examples

- UF Online
- Innovation Academy
- PaCE
- Student Veterans
- Preview Session date/time
- Study Abroad Programs

Additional training related to Student Groups may be found at: http://hr.ufl.edu/learnandgrow/toolkits-resource-center/student-information-systems/.

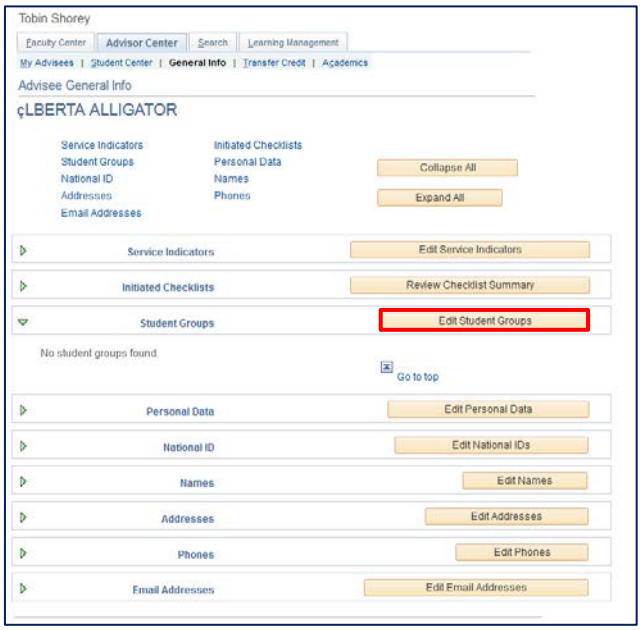
Student Group Navigation

- Navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center
  > Advisee Student Center
- Click the General Information tab



Student Groups

- Click “Edit Student Groups”

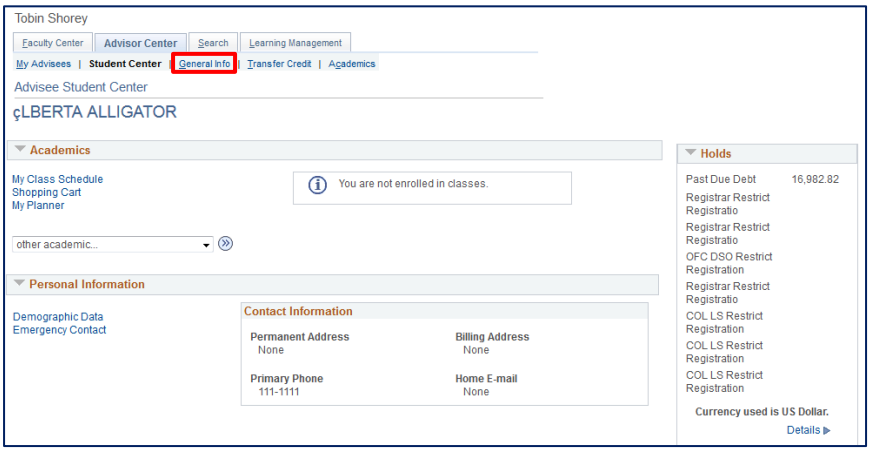


Service Indicators

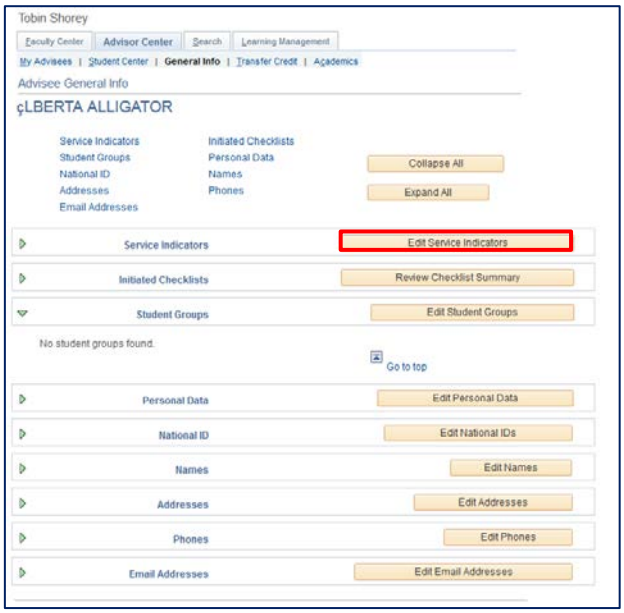
- A way to prevent services or identify a service that should be granted
- Types:
  - <u>Negative</u>: Prevents an action from happening in the database, like a hold
    - ➢ Example: Universal Tracking or AIM service indicators that restrict students from registration or graduation
  - <u>Positive</u>: Provides information
    - ➢ Example: Good Life Informational Hold

Service Indicator Navigation

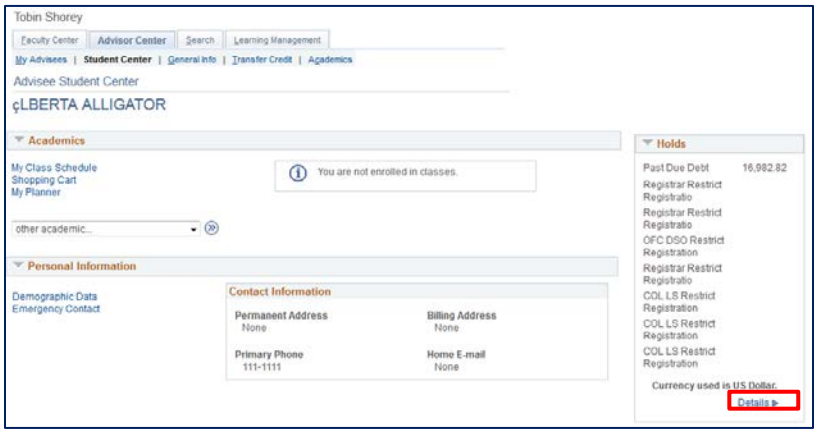
- Navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center
  > Advisee Student Center
- Click the General Information tab



- Click “Edit Service Indicators”



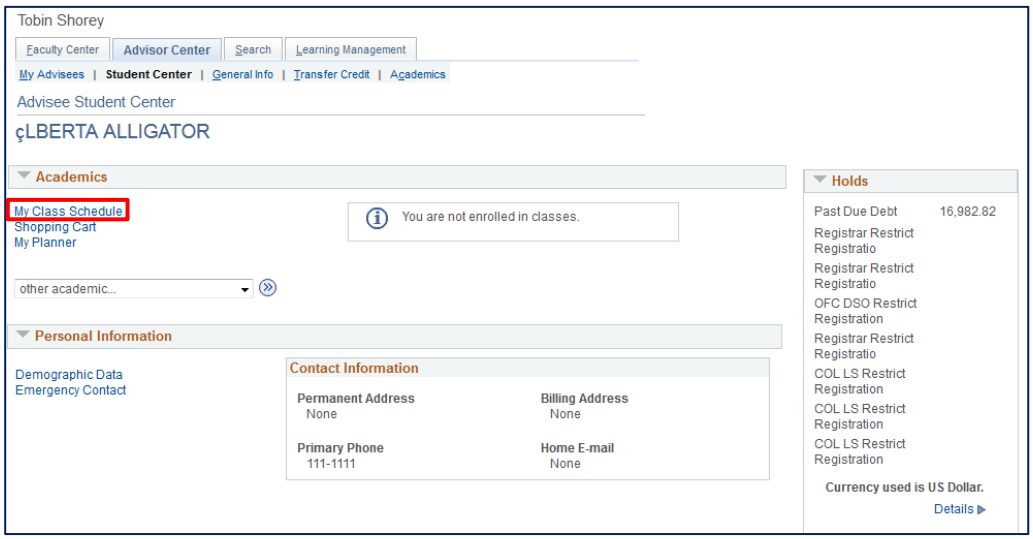
- Click “Details” to provide more information



Additional training related to applying and releasing service indicators may be found at: http://hr.ufl.edu/learnandgrow/toolkits-resource-center/student-information-systems/service-indicators/

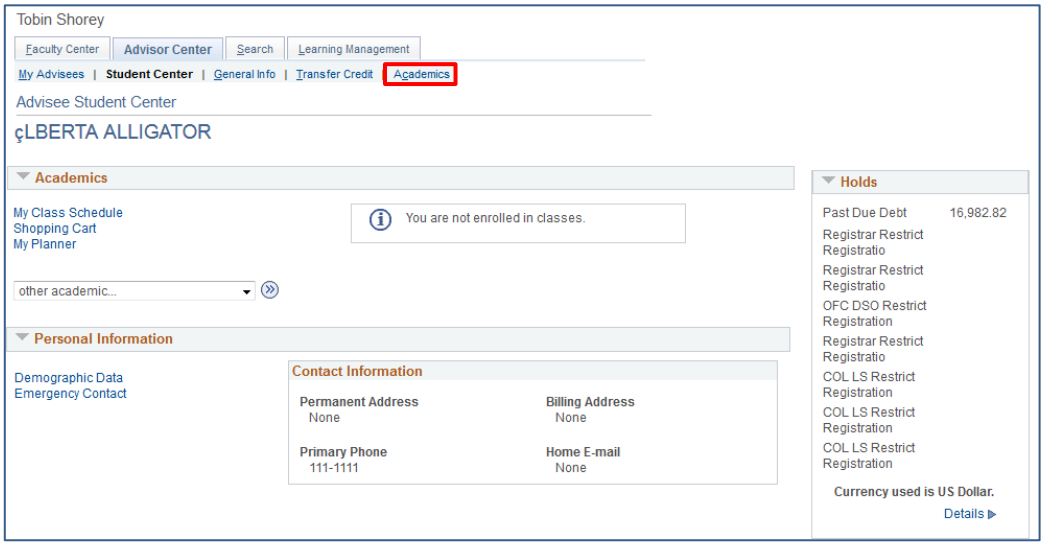
Current Schedule

- Advisors and students can quickly view current enrollment.
- This also appears on the degree audit.
- Navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center
  > Advisee Student Center
- Click “My Class Schedule”

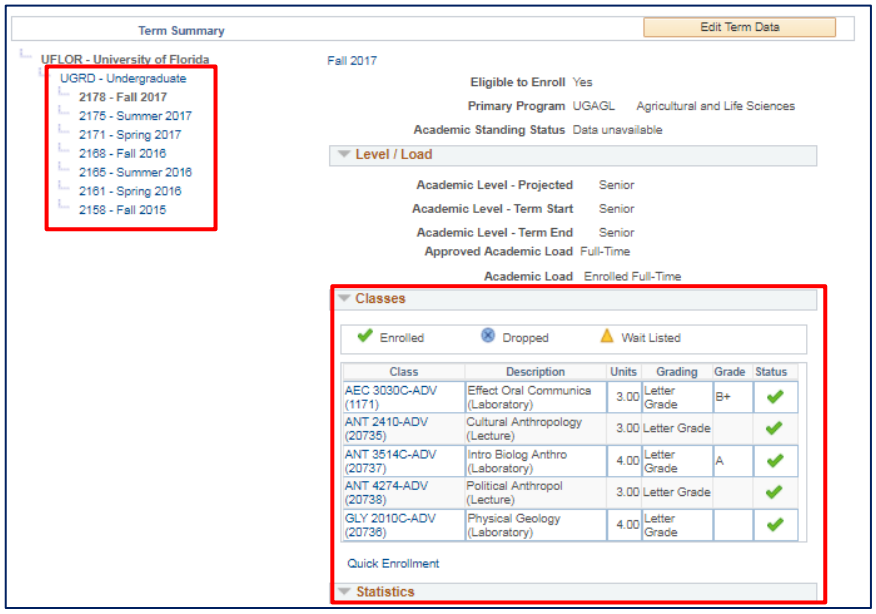


Past/Future Enrollment

- All enrollment displays on the Advisee Student Center.
- Navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center
  > Advisee Student Center
- Click on the Academics tab to view registration by term.



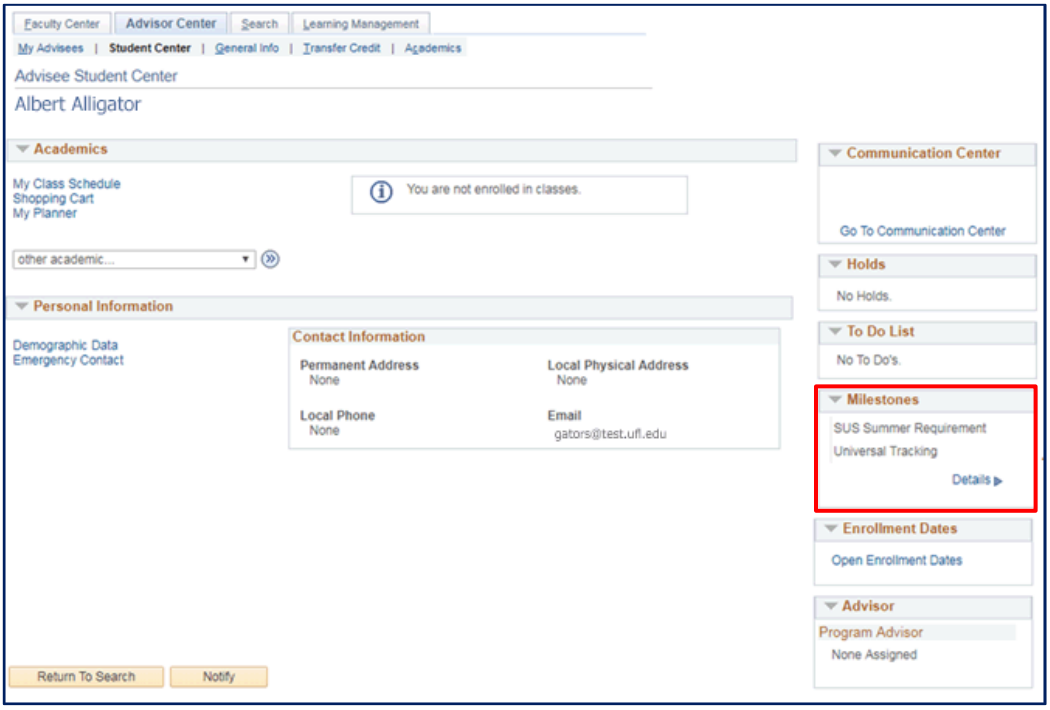
- Select the term you wish to view (below).
- Course information and statistics will appear.



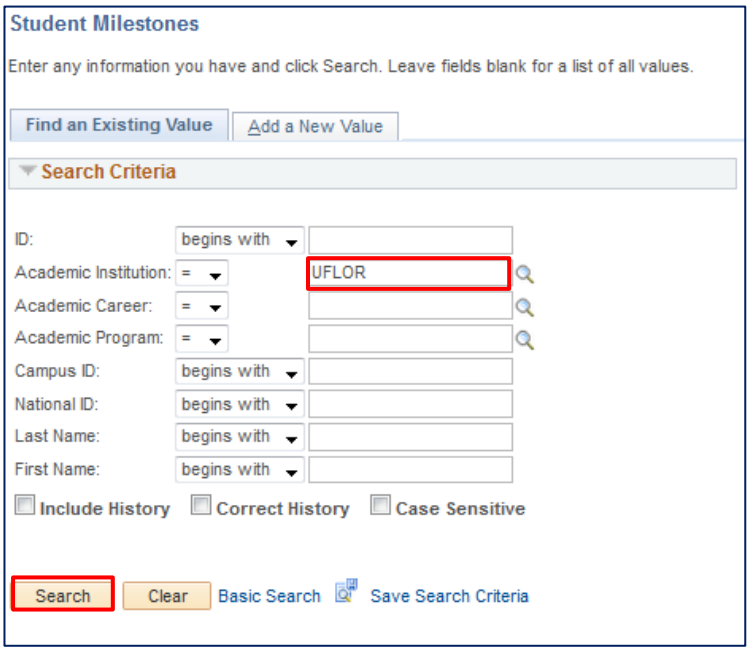
Milestones

- Milestones are academic requirements that are not necessarily course-related.
- Milestones may include items such as thesis/dissertation, universal tracking, exit exams or summer SUS requirement, or other non-course requirements that apply to the student.
- Academic advisors can add or remove milestones to students' records to impact degree audits and demonstrate progress through their degree program.
- To view milestone information, navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center

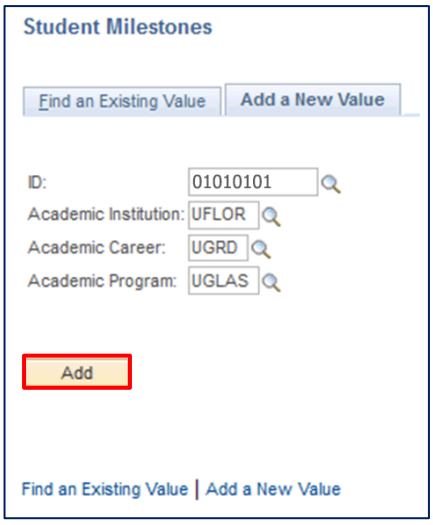
> Advisee Student Center



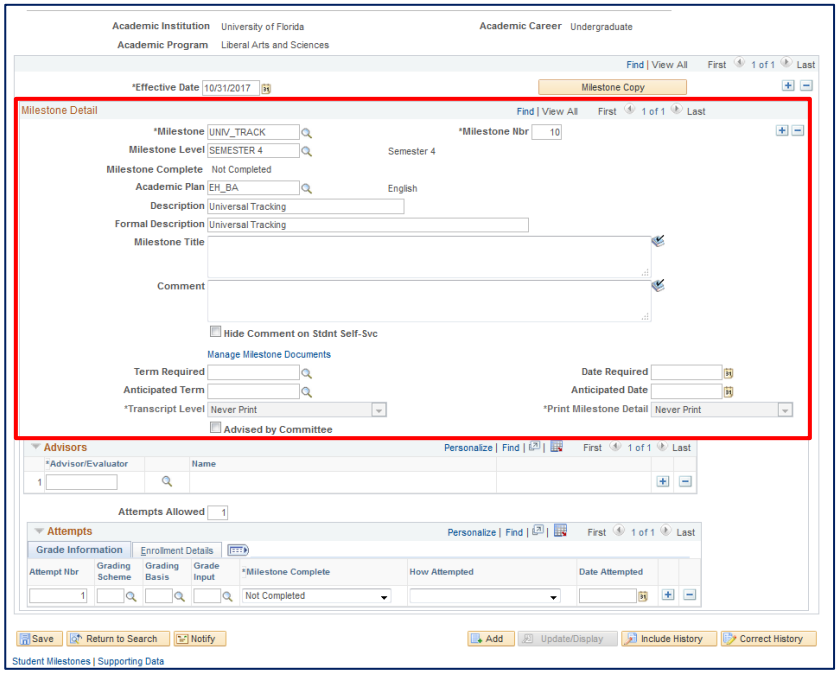
- Milestones are tied to a student's program of study (e.g. UGLAS for Liberal Arts and Sciences).
    - A student in multiple programs (dual degree) may have multiple milestone records.
    - Be sure to assign the Milestone to the correct program.
- The effective date of the milestone is checked when adding an Academic Plan on a milestone.
    - You cannot add a milestone for a plan with a date that pre-dates the admission to the student's Program/Plan.
- Advisors and department staff in programs that feature an honors thesis component for graduation with Summa and Magna Cum Laude status will have to update milestones for their graduating students.
- Navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Records and Enrollment
  > Enroll Students
  > Student Milestones
- Search for student



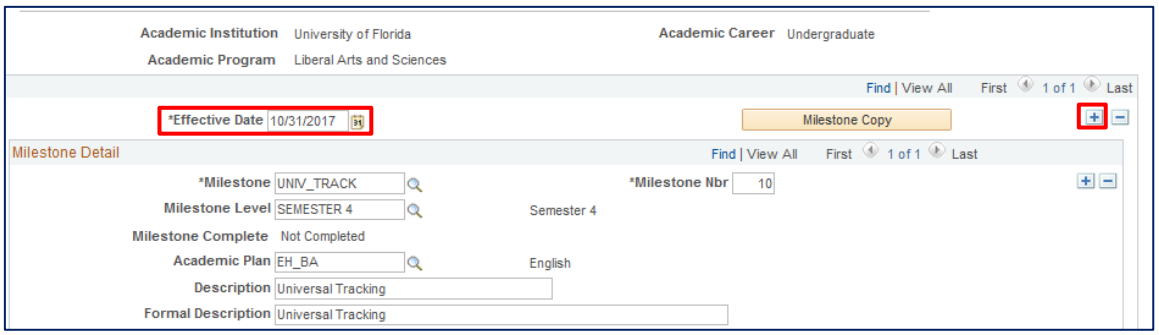
- If the search does not pull up the student in question
  - Select “Add a New Value” tab at the top of the screen and fill in the relevant information
  - Click Add



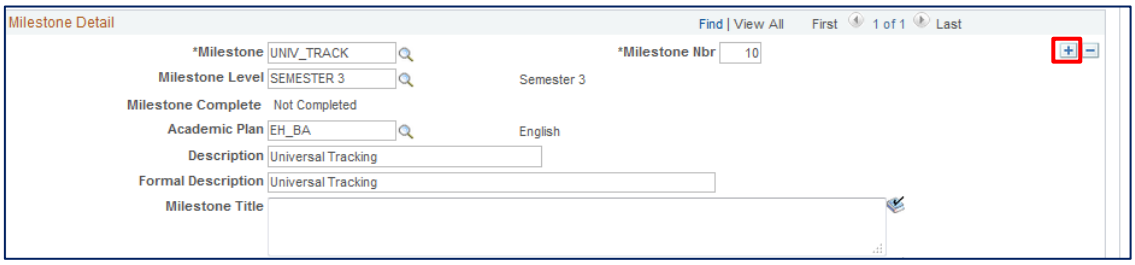
- If the student already has milestones assigned to two or more programs, the search feature will pull up both “stacks.”
- Select the relevant program to continue.
- If the student has milestones for only one program, the milestone info will appear.



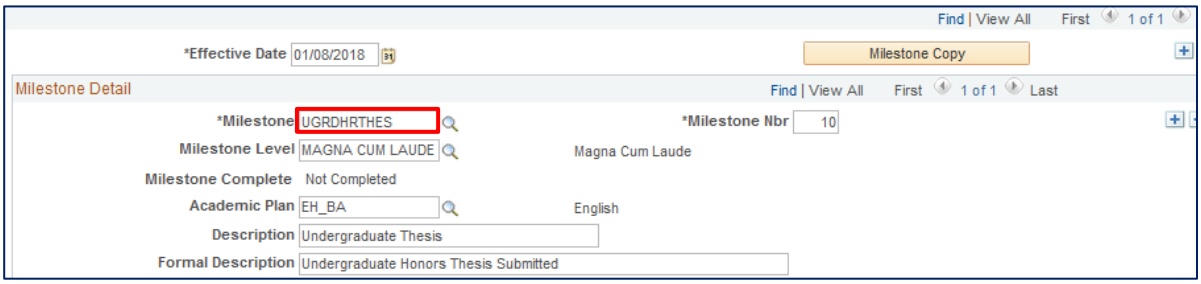
- To add a new milestone, click the "+" button on the same line as the effective date to add a new effective date (NOTE: this will pull all previous milestones forward automatically).



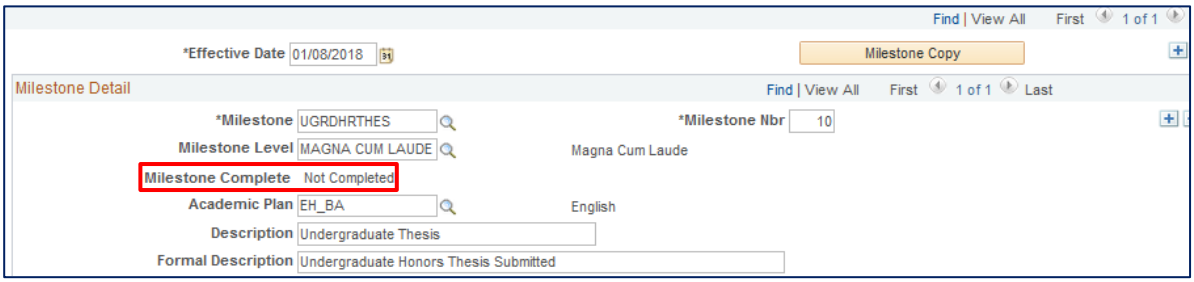
- Next, select the "+" sign within Milestone Detail to add a new milestone.



- On the screen that appears, select the milestone that the student is earning, and the milestone level.
  - For Honors Theses and projects, select "UGRDHRTHES".
  - For the Milestone Level, select Magna or Summa Cum Laude. CUM LAUDE does not require a milestone.



- Also enter the student's Academic Plan on the milestone before selecting Save.
- Adding this will cause the degree audit to evaluate GPA, Course, and Milestone requirements to determine if the student meets requirements to graduate MAGNA CUM LAUDE.



- Additional training related to Graduate Committees and Milestones may be found at: http://hr.ufl.edu/learnandgrow/toolkits-resource-center/ under "Student Information Systems"

New Features in myUFL

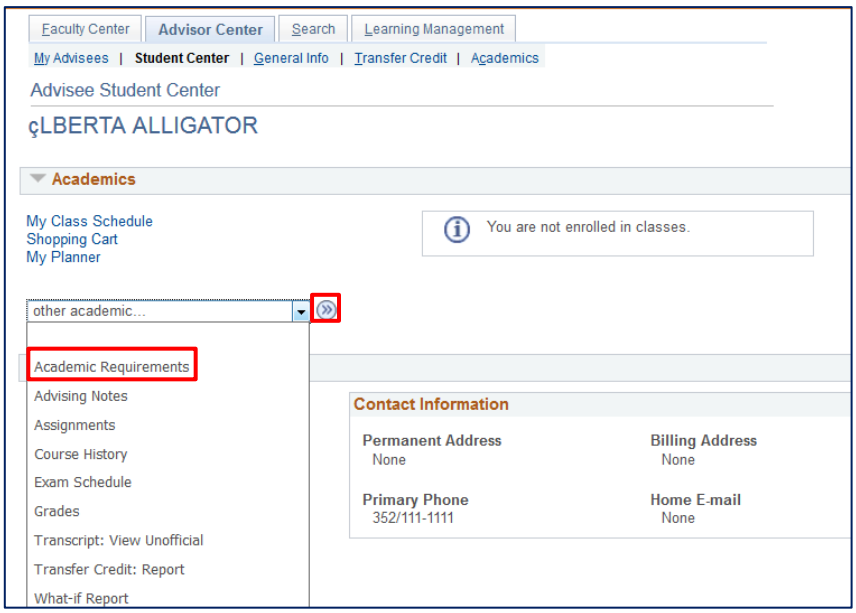
- Academic Advising is now integrated with current enrollment so there is not a delay from when a student drops or adds a course to when it appears on the audit.
- Advisors can post exceptions directly from the audit using a drop-down menu.
- Students and advisors can view the same degree audit.

Meet Albert!

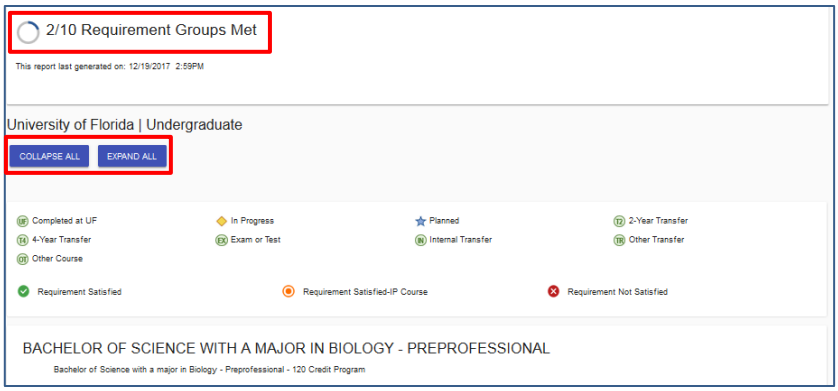
- You are an advisor in the College of Liberal Arts & Sciences and are running an audit on a student named Albert. He is a pursuing a Bachelor of Science in Biology.

Run an Audit

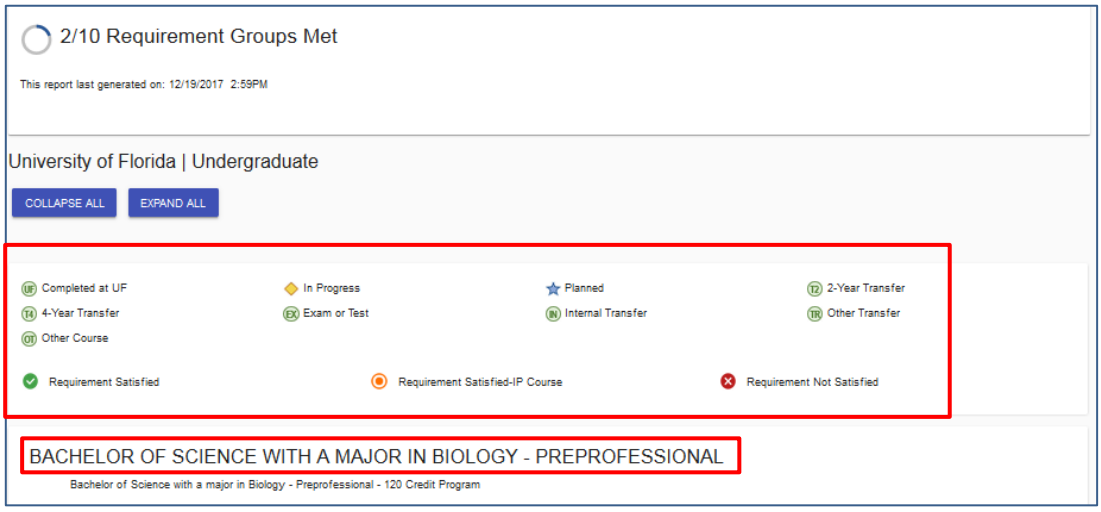
- Navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center
  > Advisee Student Center
- Select Academic Requirements from the drop-down menu and click >>.



- Header, including name and number of Requirement Groups met (see below)
- Open or close all Requirement Groups, Requirements, and Requirement Lines (see below)

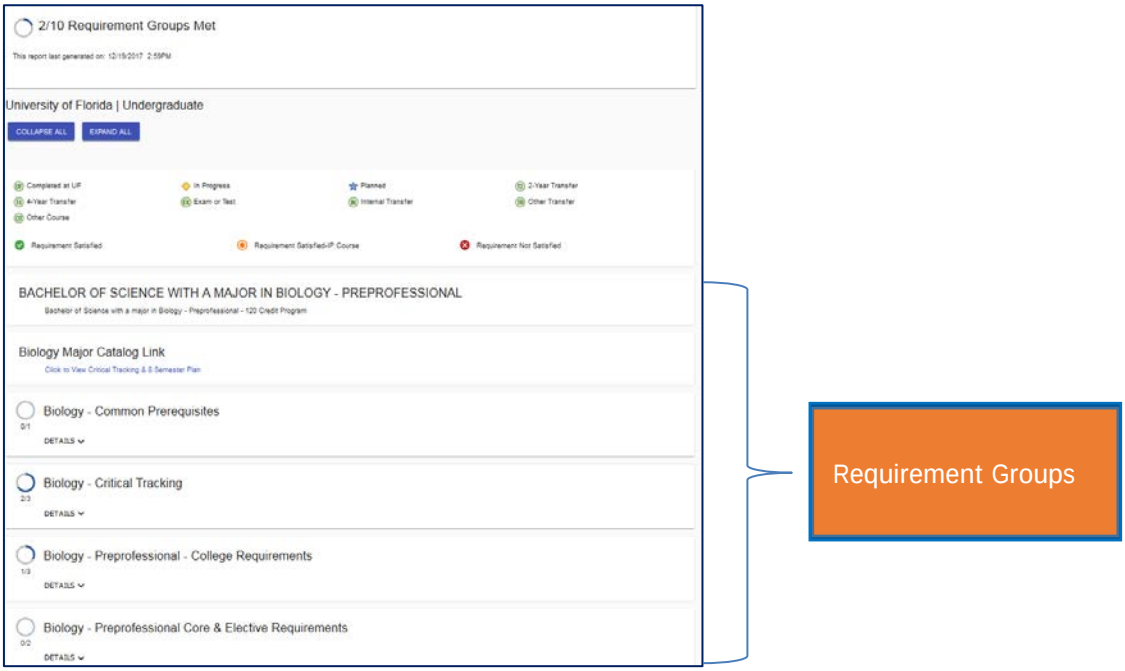


- Key information for reading Degree Audit (see below)
- First Requirement Group of each program will be in all capital letters (see below)



Requirement Groups

- Separate boxes on the degree audit that can open/close
- Groups of Requirements can be arranged in two default configurations:
    - **AND**: All Requirements must be met to meet the Requirement Group
    - **OR**: Requirement Group is met when the prescribed number of requirements are met
- An attachment point between Student Records (Student Program/Plan Stack) and Degree Audit Requirements

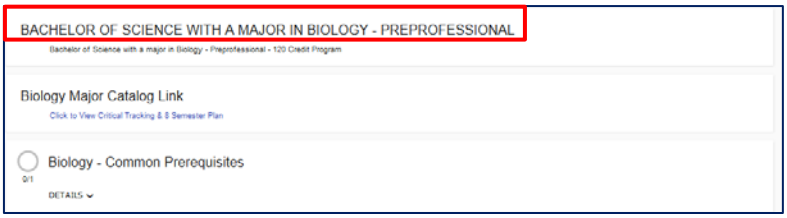


Characteristics of Requirement Groups

- Demarcated as separate boxes on the degree audit
- If requirements must be fulfilled, will include:
    - Status Indicators
        - Met
        - In Progress
        - Unmet

    - Details link
    - If all requirements met, will have this symbol: 
- As delivered, courses do not share between Requirement Groups.
- Share sets have been set-up to allow Requirement Groups to share unless there are specific curricular reasons to **NOT** allow this.
- Requirement Groups can measure
    - Min/Max GPA

    - Minimum course count
    - Grade points per unit
- Can be pre-conditioned to only appear on a student's degree audit when specific conditions are met
- Measuring at the Requirement and Requirement Line Levels
- First Requirement Group of every major, minor, and certificate will appear in all capital letters

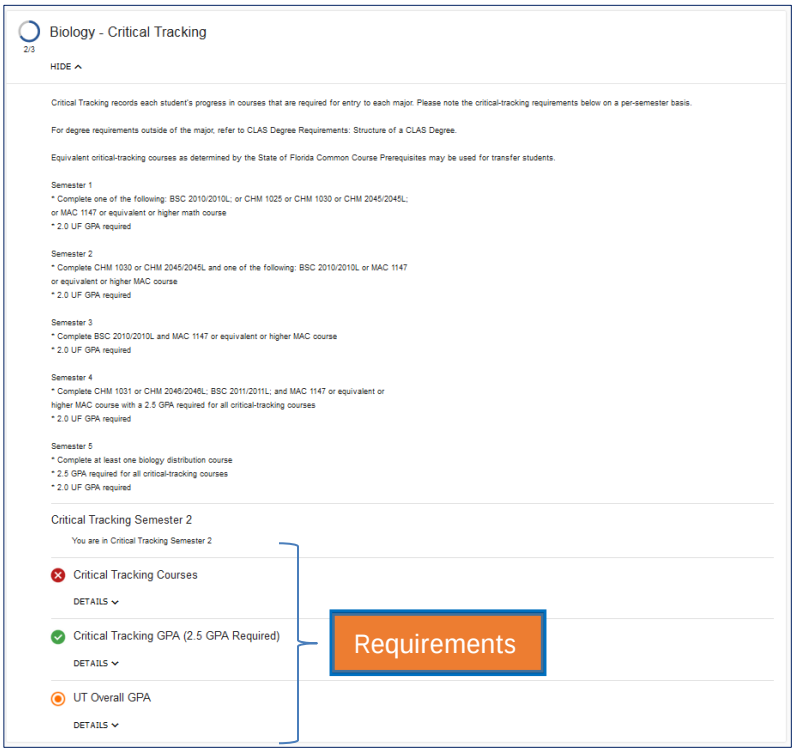


Requirement Groups

- Undergraduate degree programs will have 12 Requirement Groups

1. Degree Name	7. Graduation with Honors Requirements
2. Catalog Link	8. General Education Good Life & State Core
3. Common Prerequisites	9. General Education Summary
4. Critical Tracking	10. General Education International/Diversity Requirement
5. College Requirements	11. University Writing Requirement (Gordon Rule)
6. Core or Major Requirements	12. University Requirements

- Next level within Requirement Groups and contained by lines

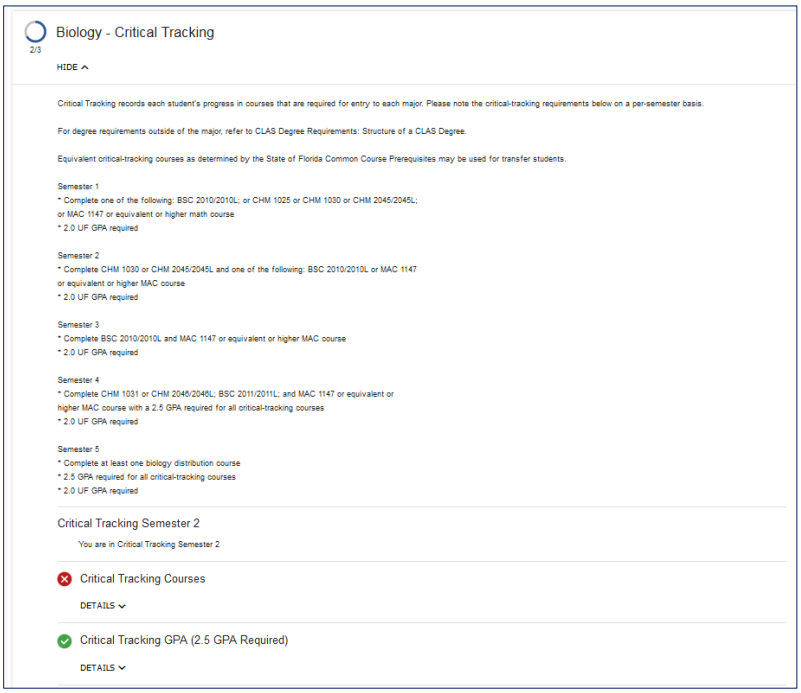


- Requirement Lines arranged into two default configurations:
  - **AND**: All Requirement lines must be met to meet the Requirement
  - **OR**: Requirement is met when the prescribed number of Requirement Lines are met

Characteristics of Requirements

- Status indicator sits to the left of the Requirement indicating if it's:
  - Met
  - In Progress
  - Unmet

  **Unless it is flagged to "Hide Status"
- Requirements can be set to "Verify" or "Include in All Statistics." In almost **ALL** cases, UF requirements are set to "Include in All Statistics" so that courses used are flagged as "used" in reports.
- The Critical Tracking informational text above the Requirements in this example is attached to the Requirement Group.
- The lines separating the Requirements from the Requirement Group text are indented.



Biology - Critical Tracking

2/3

HIDE

Critical Tracking records each student's progress in courses that are required for entry to each major. Please note the critical-tracking requirements below on a per-semester basis.

For degree requirements outside of the major, refer to CLAS Degree Requirements: Structure of a CLAS Degree.

Equivalent critical-tracking courses as determined by the State of Florida Common Course Prerequisites may be used for transfer students.

Semester 1
* Complete one of the following: BSC 2010/2010L; or CHM 1025 or CHM 1030 or CHM 2045/2045L;
or MAC 1147 or equivalent or higher math course
* 2.0 UF GPA required

Semester 2
* Complete CHM 1030 or CHM 2045/2045L and one of the following: BSC 2010/2010L or MAC 1147
or equivalent or higher MAC course
* 2.0 UF GPA required

Semester 3
* Complete BSC 2010/2010L and MAC 1147 or equivalent or higher MAC course
* 2.0 UF GPA required

Semester 4
* Complete CHM 1031 or CHM 2046/2046L; BSC 2011/2011L; and MAC 1147 or equivalent or
higher MAC course with a 2.5 GPA required for all critical-tracking courses
* 2.0 UF GPA required

Semester 5
* Complete at least one biology distribution course
* 2.5 GPA required for all critical-tracking courses
* 2.0 UF GPA required

Critical Tracking Semester 2

You are in Critical Tracking Semester 2

Critical Tracking Courses

DETAILS

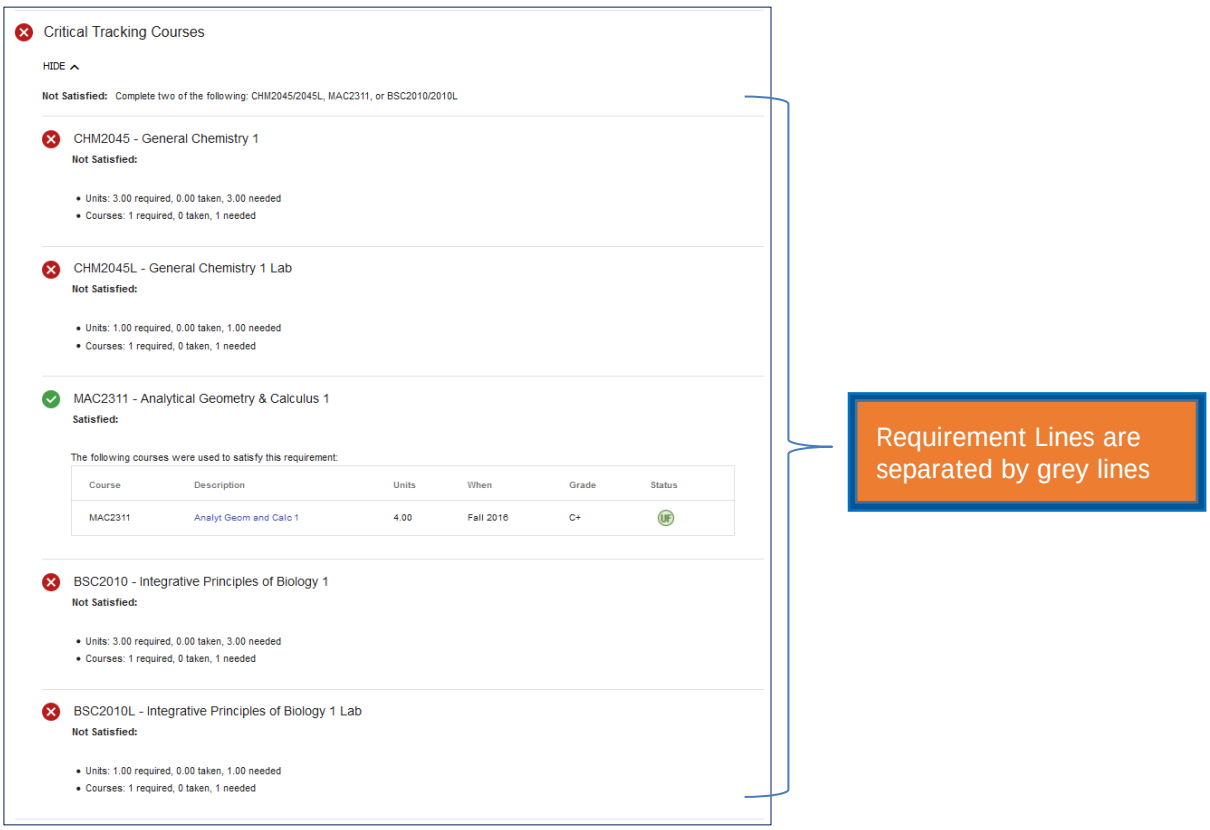
Critical Tracking GPA (2.5 GPA Required)

DETAILS

- "Used" courses in requirements CANNOT be "used" again in other requirements within a Requirement Group.
- Requirements can be pre-conditioned to only appear on a student's degree audit when specific conditions are met. This is frequently used in Universal Tracking.
- Requirements can measure:
    - Minimum Units
    - Minimum Courses
    - Minimum GPA
    - Minimum Grade Points/Unit
- In the vast majority of cases, these measurements are actually done at the Requirement Line Level

Requirement Lines

- Next level within Requirements-Requirement Lines are always housed under Requirements
- Can open and close to show conditions for completion
- Requirement Lines are automatically open when you open a Requirement

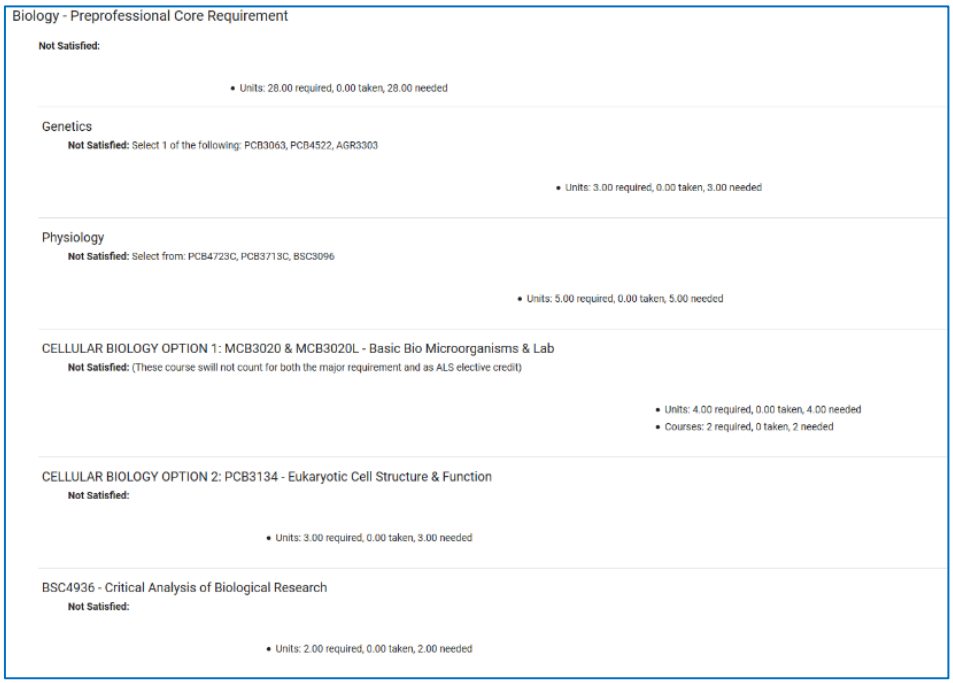


Characteristics of Requirement Lines

- A status indicator sits to the right of the Requirement Line indicating if it is Met, In Progress, or Unmet unless it is flagged to "Hide Status."
- This is the level where minimum requirements and used statistics are most often captured.
- Varying levels of detail can be provided about courses or milestones that satisfy Requirement Lines based upon how the Requirement Line is built.
- Requirement Lines can be set to hide or display courses that can be used to fulfill it. This is done by selecting "Display Select Line" while creating the Requirement.
- Completed Requirement Lines display course information for how they were met
- Most of the time, the Requirement Line is the level at which you will make exceptions
- Requirement Lines can be connected by conjunctions:
  - "AND"
  - "OR"
    - OPTION 1
    - OPTION 2

Clearly denotes that only one of them has been met

- "OR" Requirement Lines that exist in a requirement that is otherwise connected by "AND" will appear like this. (see below) When one of these is met, the other will disappear.



- Requirement Lines can be set to “Verify”
    - Verify will not “use” courses.
    - This is most often used for GPA calculations.
- Requirement Lines can be set to “Include in All Statistics”
    - “Include in All Statistics” is set to actually count the course in the degree program.
    - Setting at this level OVERRIDES what is set at the Requirement level.
    - Any course used in an “Include in All Statistics” Requirement Line cannot be used by any other Requirement Line flagged to “Include in All Statistics” within a Requirement or Requirement Group unless that line is set to “Verify.”
- When courses are used to fulfill Requirement Lines, a Status Column appears to indicate if the coursework was completed through Enrollment, Transfer Coursework, or Test Credit.
- Current and future registration will display on the degree audit with a status of “in progress.”

WHATIF Audit

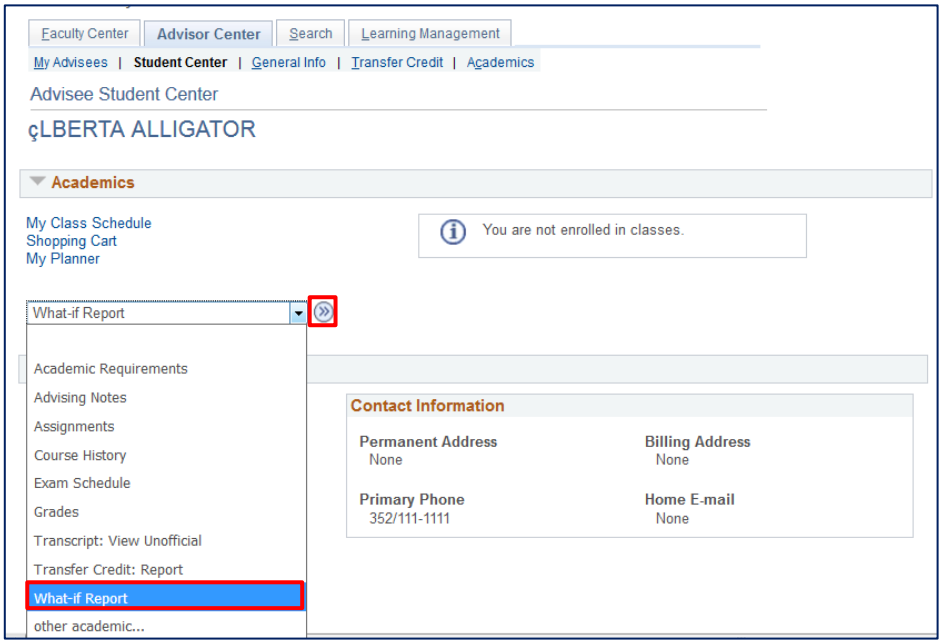
- Allows a student and advisor to see what a student would look like if they modified their Student Program/Plan.
- For example, Albert, a biology student, is considering changing majors and wants to see what courses he would need to graduate.

Run a WHATIF Audit

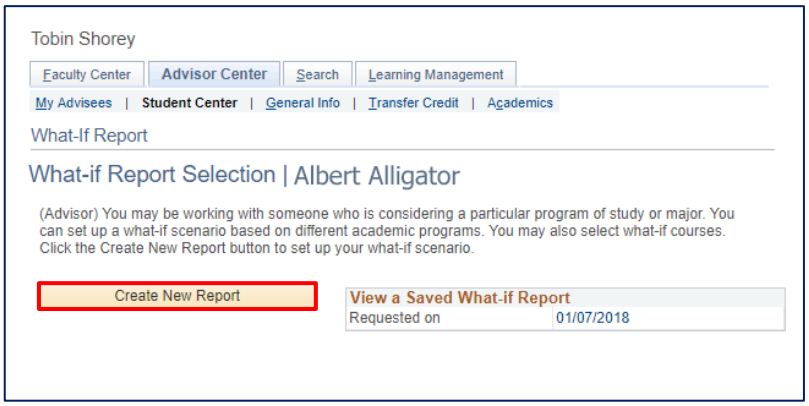
- Navigate to myUFL

> NavBar
> Main Menu
> Student Information System
> Self Service
> Advisor Center
> Advisee Student Center

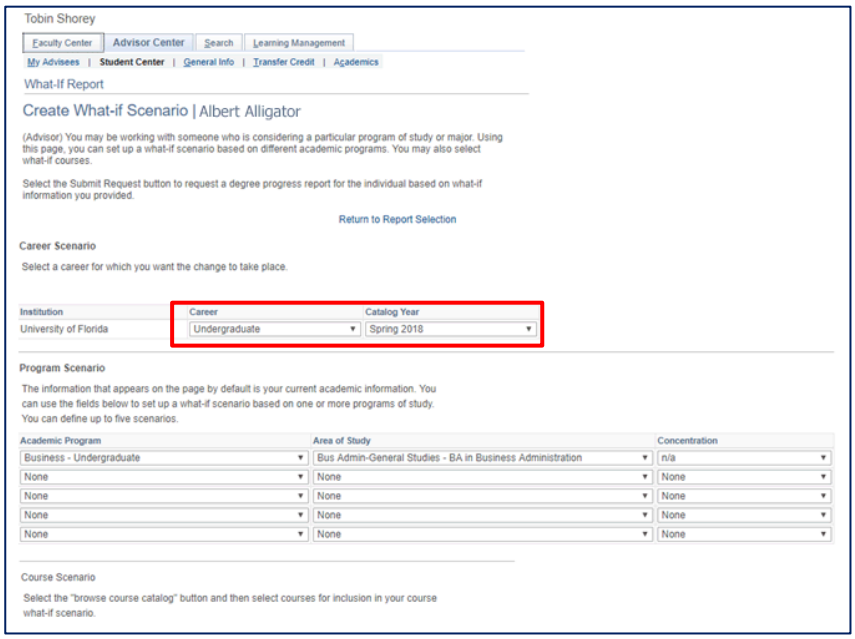
- Search for Student
- Select “What-If Report” from the drop-down menu
- Click >>



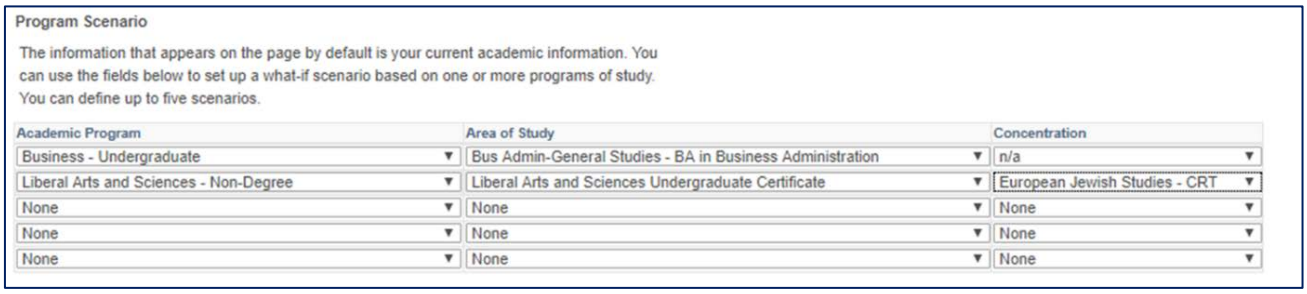
- Click “Create New Report” to create a new combination.



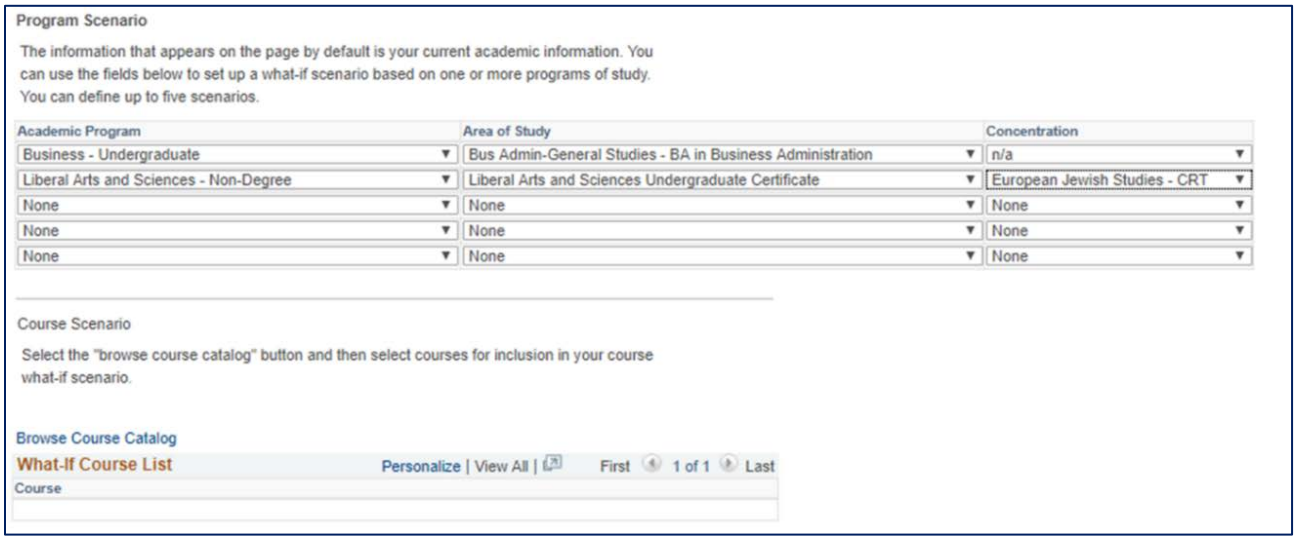
- Note: If a WHATIF report has been recently run for a student, it will appear as a link next to the Create New Request button. It is always recommended to create a new request.
- Review relevant Career and Requirement Term (Catalog Year).



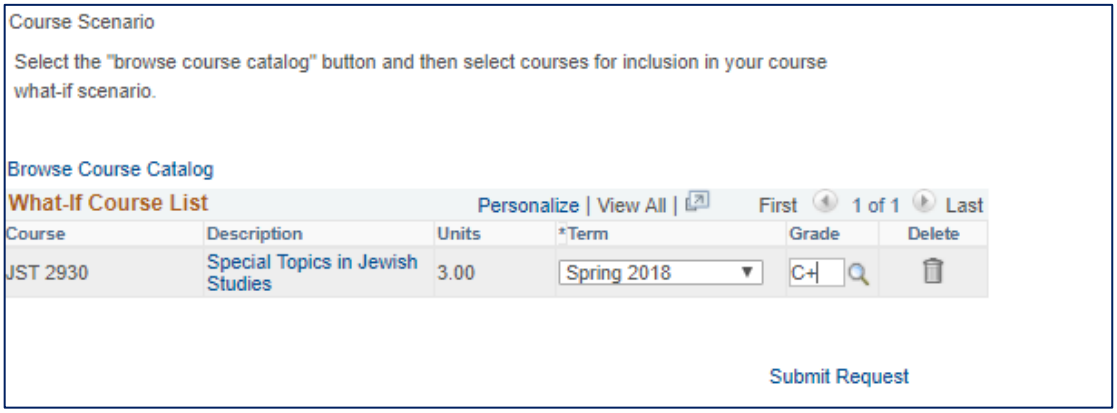
- Under Program Scenario, select relevant Program/Plan/Sub-plan combinations



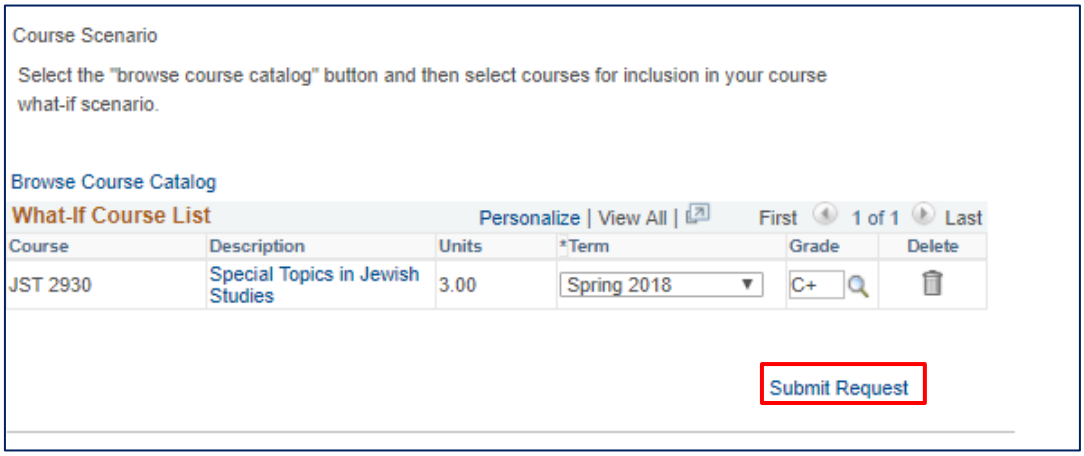
- The student's current combination of Program/Plan/Sub-Plan information will display by default.
- To run one program, select "None" in the 2-5 program plan stack combinations.
- To run multiple programs, update the drop-downs accordingly.
- For majors and minors:
    - The Academic Program will be the college offering the major or minor.
    - The Area of Study will be the major or minor name.
- The Concentration is used to denote the major's specialization (if offered).
- Certificates should be run with the "Non-Degree" Academic Program.
    - The Area of Study will be the College Name Offering the Certificate, followed by the Certificate Level (e.g. Liberal Arts & Sciences Undergraduate Certificate).
    - The Concentration is the actual Certificate Name. In this example, we add the European Jewish Studies Certificate to the student's previously existing General Business major.



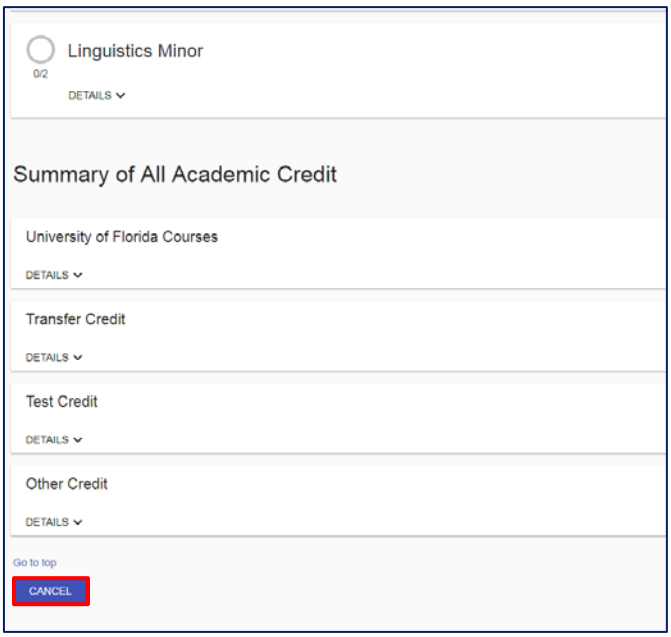
- When running multiple program/plans, minors and certificates may appear before degree programs on the degree audit since they are not "attached" to the student's active Program/Plan stack(s).
- Course Scenarios allow users to add courses with grades to show what an audit will look like ***IF*** the student earns them. In the example below, we are figuring in JST2930 with a grade of C+.



- Click "Submit Request" to view audit



- At the bottom of the audit, there will be a "Cancel" link to return you to the Advisee Student Center.



Exceptions and Advising Notes

- Next we will cover how to read, write, or update exceptions and advising notes. Let's begin with reading exceptions.

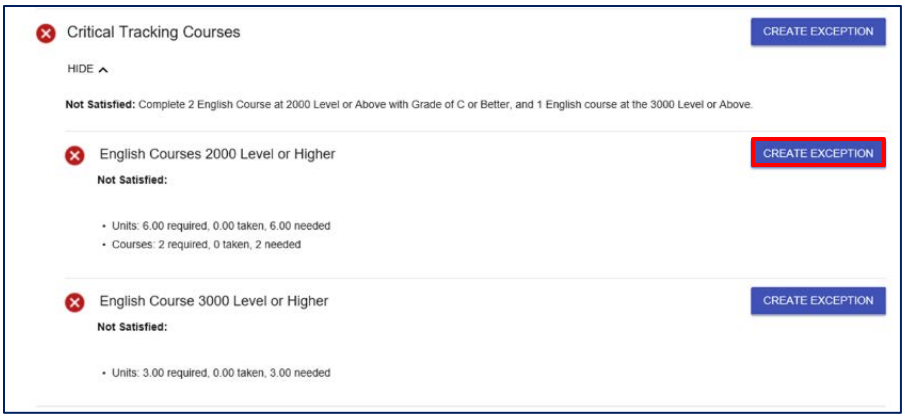
Reading Exceptions

- Course Directive
- Requirement Change
- Requirement Override
- Requirement Waiver
- Course Substitutions

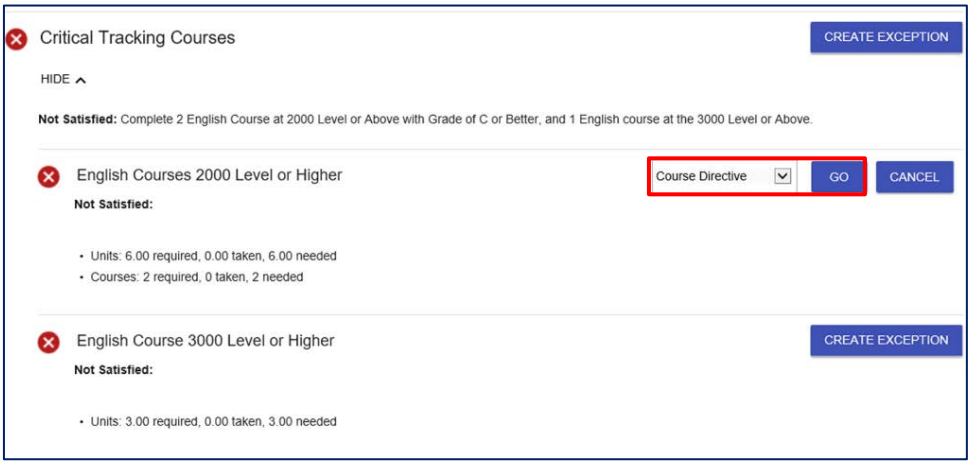
- Course Directives
  - Will insert or remove a course in a particular Requirement Line
  - Not available at the Requirement Level
  - To use a Course Directive, navigate to the student's Degree Audit and open the particular Requirement Line that requires the change.

If you are authorized, you will see the "Create Exception" button.

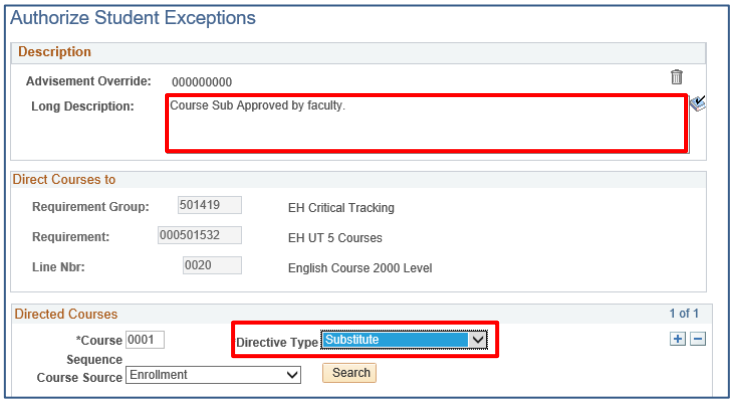
- Course Directives will ONLY be inserted into the particular Requirement Line that you select.
- If you want the same course to appear in multiple places, you must do a course directive for each place in the degree audit.
- Select the "Create Exception" button at the particular Requirement Line level



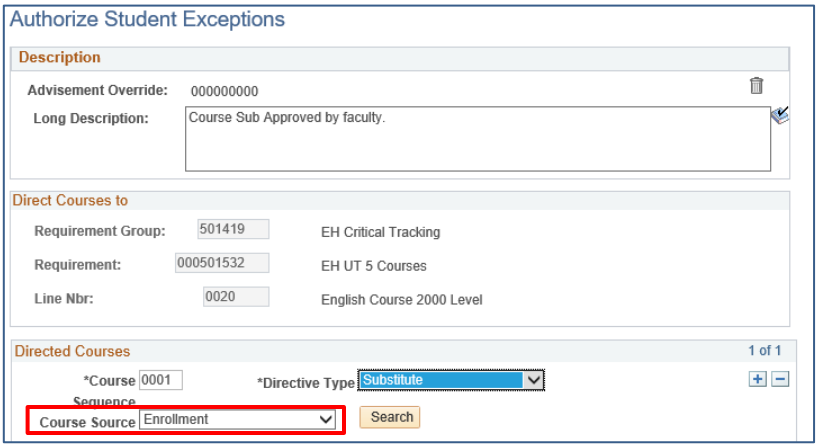
- The Exception Dropdown will open for you to select "Course Directive"
- Select "Go"



- The Authorize Student Exceptions page will load for user input.
  - Basic information is required when posting an exception
  - Two options are “Substitute” or “Exclude”



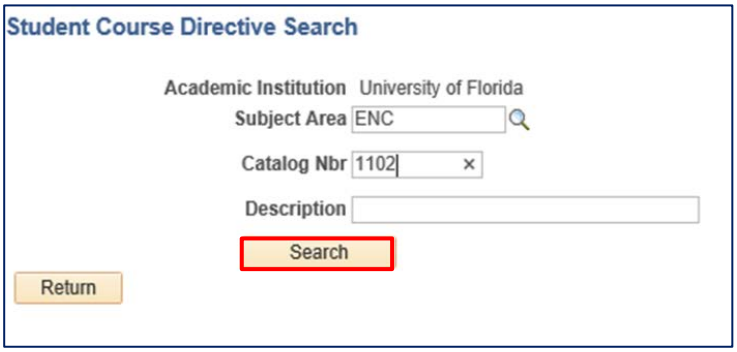
  - Be sure to select where the course is located



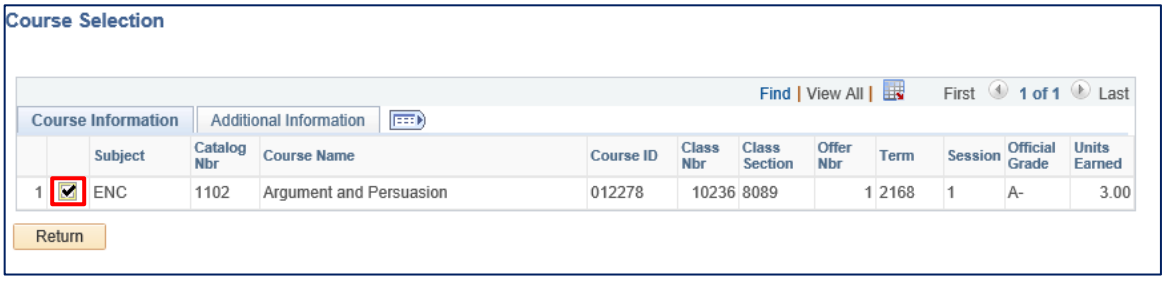
- To place a Course Directive that will come into effect once a course is taken, select

Course Offering in the “Course Source” dropdown.

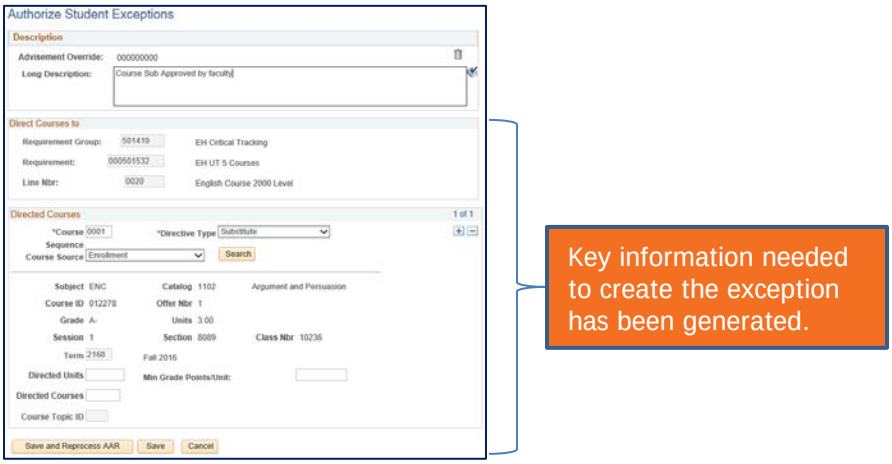
- After selecting Search, you will be taken to a screen for location of the course you wish to substitute and select Search.



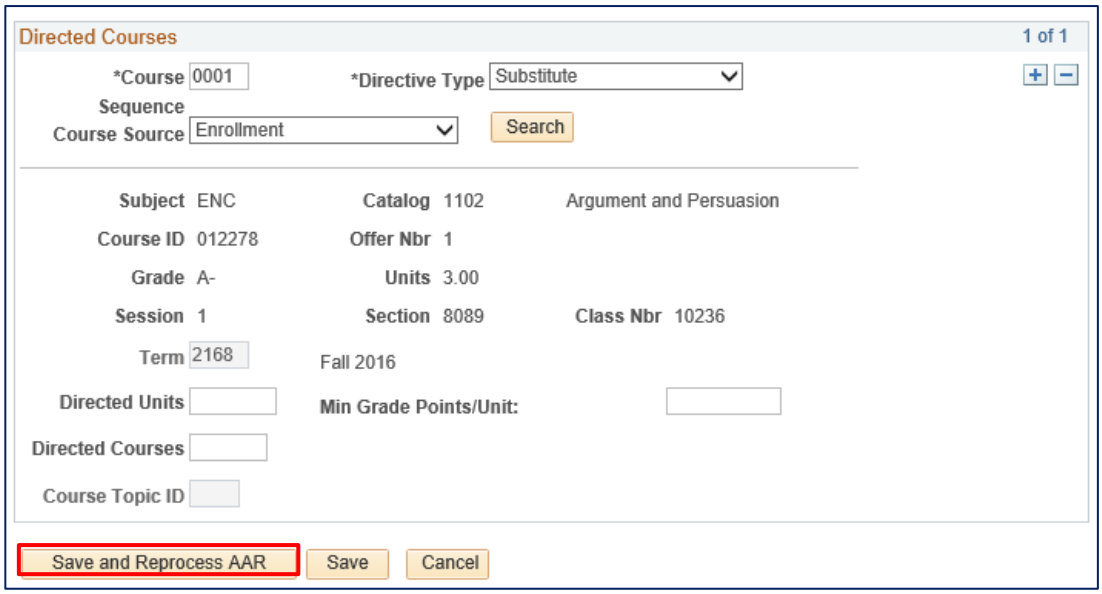
- Next, confirm the course you selected by clicking the check mark by the course.



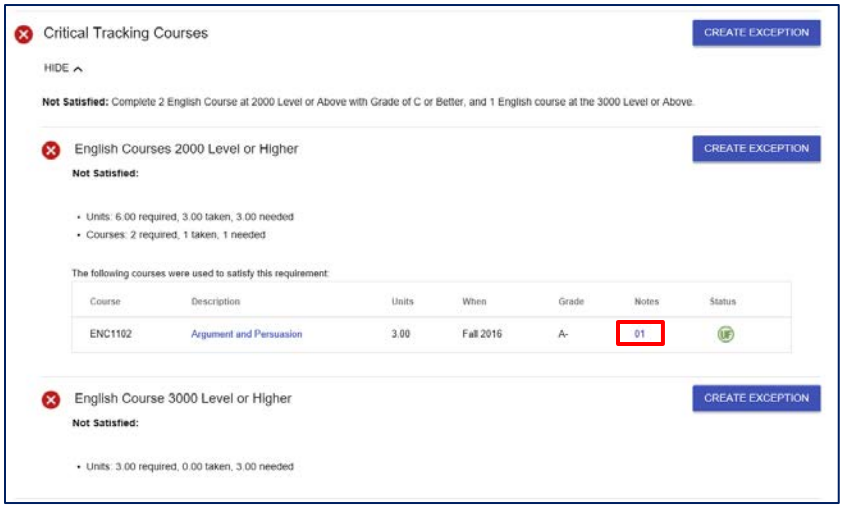
- You will be returned to the Authorize Student Exceptions page with all relevant data completed.



- Select “Save and Reprocess AAR” to complete the Course Directive.
- Return to the audit to view the exception.



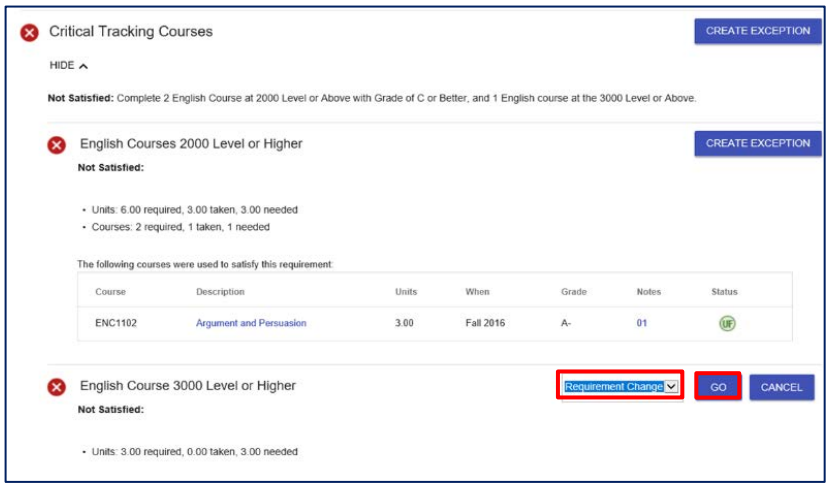
- Reopen the Requirement Group and Requirement where you made the substitution to view the addition.
- Note the "01" in the Notes field. Clicking that link will show information about the exception that was made.



- Requirement Change
  - A Requirement Change is used to change the minimum or maximum characteristics of a Requirement or Requirement Line.
  - Most of the time, this type of exception is processed at the Requirement Line Level.
  - If a Requirement does not have minimum or maximum values, adding values will impose additional Requirement parameters for the student.
- Requirement Change can be used to modify:
  - Required units (Credits)
  - Number of courses

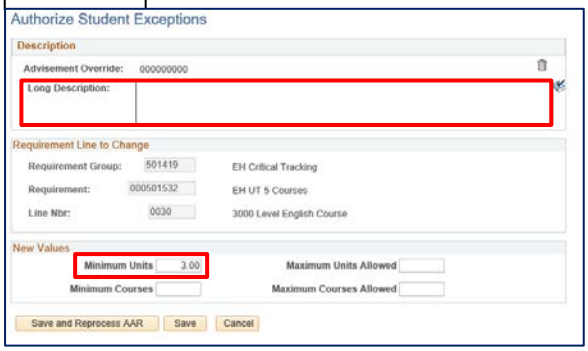
- GPAs

- Let's say we want to decrease the number of credits required for 3000 level English courses to 2 credits in the UT requirement.
- Navigate to the student's degree audit, expand the Requirement Group and Requirement where you wish to make the change and select GO.

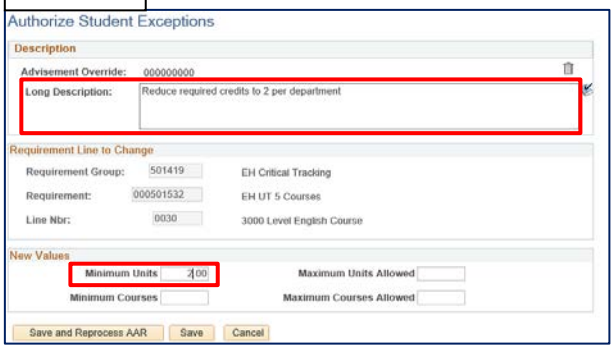


- The two fields we need to change are the Long Description and the Minimum Units.

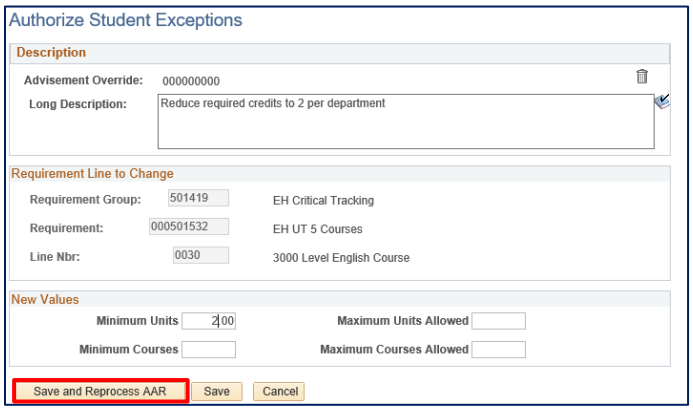
Before



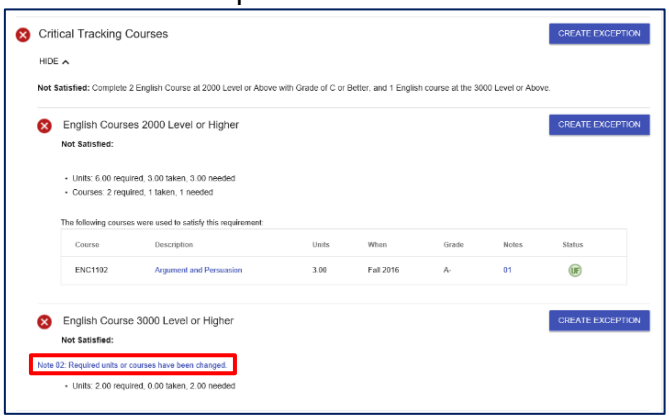
After



- Select "Save and Reprocess AAR" to return to the audit.

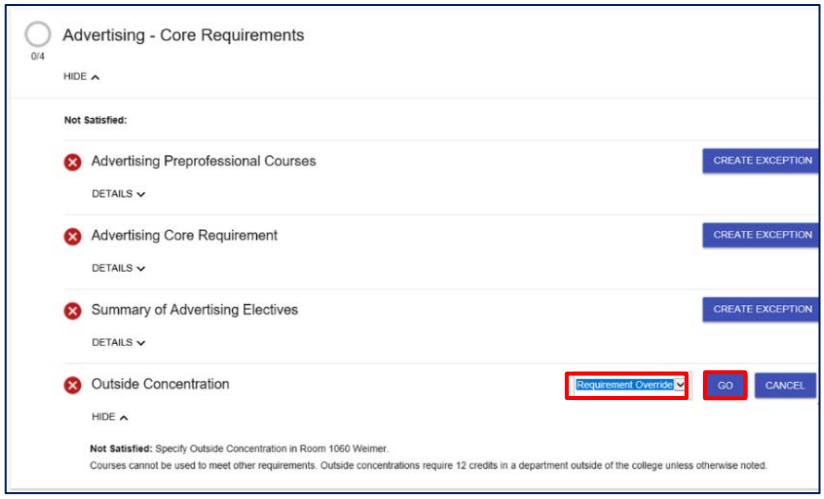


- Open the particular Requirement Group and Requirement to note the change.
- Clicking the link above the changed requirement line will show the long description entered in the step above.

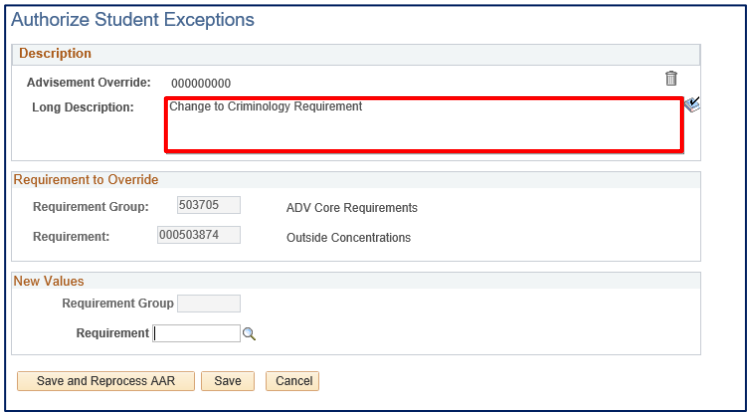


Note the required units have been reduced and a link has been inserted to inform the user than exception was made.

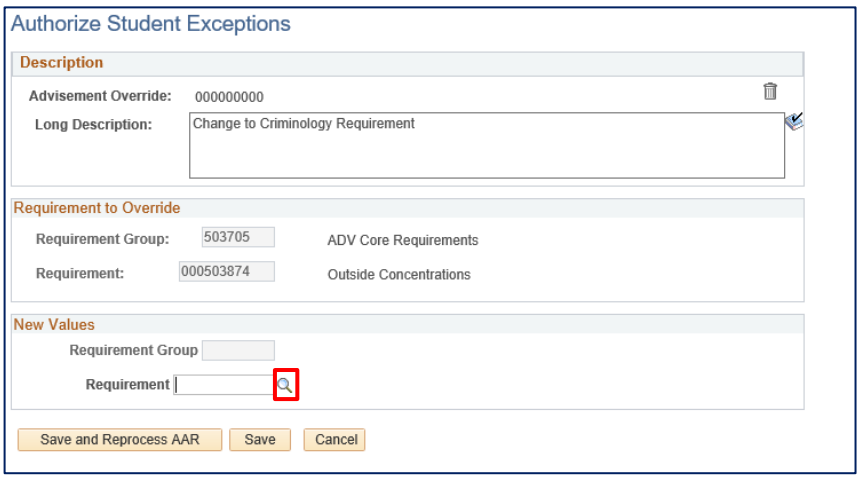
- Requirement Override
  - A Requirement Override is used to change a Requirement or a Requirement Line to another one. The alternate Requirement must be set up with the student type in advance for this to work.
  - Requirement Overrides are used for Journalism and Heavener School of Business "outside concentrations" to replace the generic requirements that exist on their audits.
  - Navigate to the Requirement Group where the "outside concentration" exists (for this example, the Advertising Core Requirement Group).
  - Select Create Exception.
  - Change the dropdown to Requirement Override.
  - Select Go.



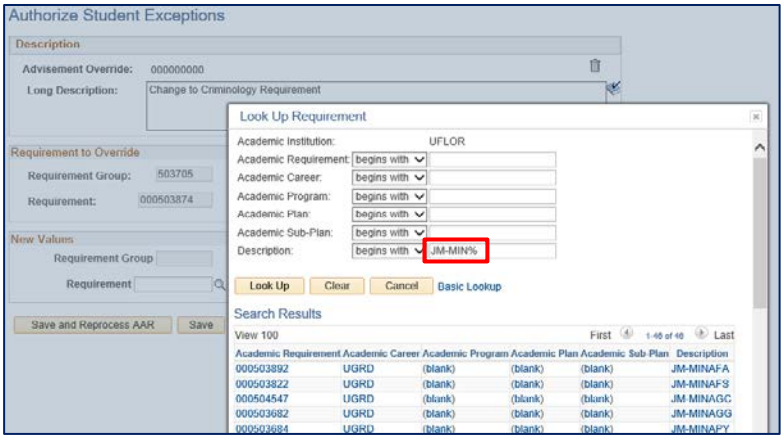
  - Fill in the Long Description.



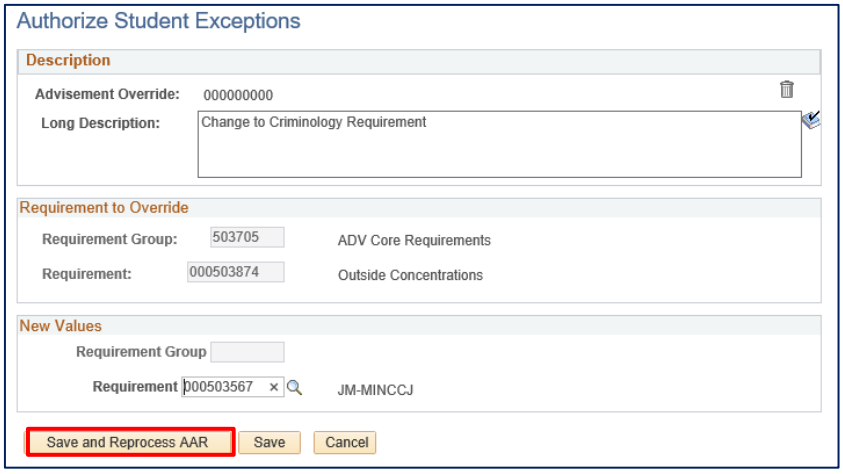
- Click the Magnifying Glass next to Requirement to search for the appropriate Requirement.



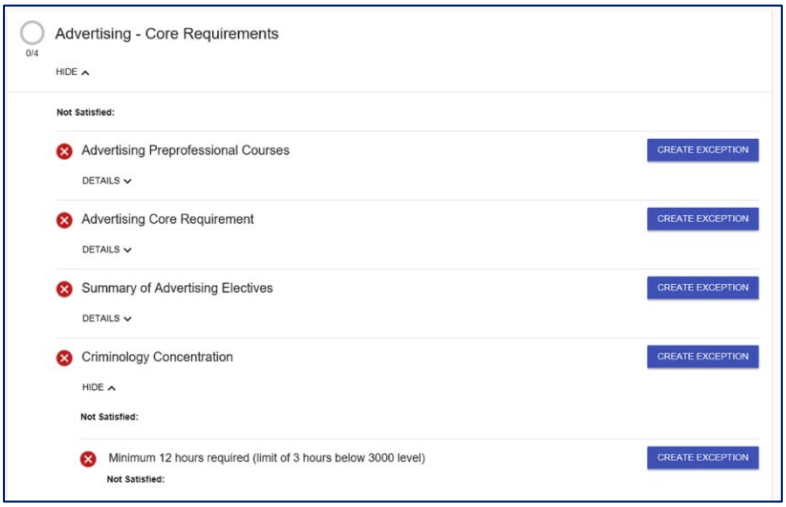
- Use JM-MIN% in the description.



- Select JM-MINCCJ.
- Select “Save and Reprocess AAR”.



- View the particular Requirement Group and Requirement to see the Requirement replaced with the new one.

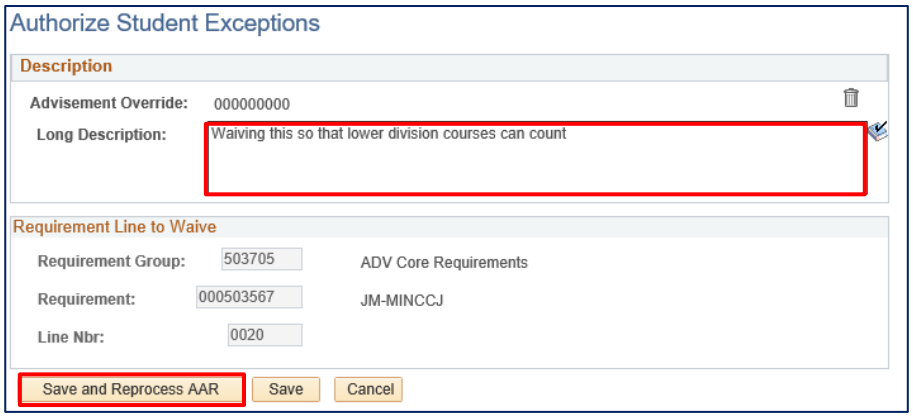


New Requirement appears

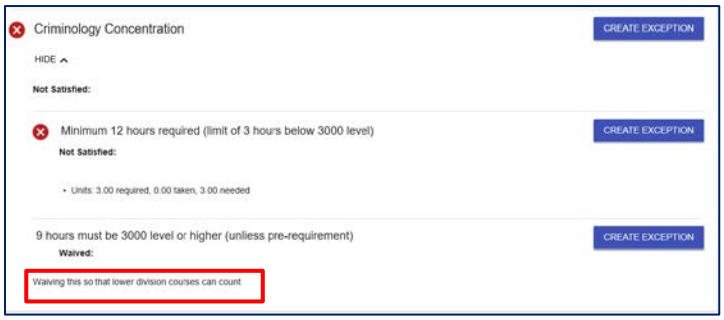
7. Requirement Waiver
    - A Requirement Waiver is used to waive a Requirement or Requirement Line. It will drop all courses already in the area and cause the area to be "met."
    - This should NOT be used unless it is necessary. It is preferable to use Course Directives and Requirement Changes to close out an item on the audit if the Requirement and/or Requirement Line has used courses.
    - A common use of Requirement Waiver includes waiving non-course requirements or GPA requirements.
    - Navigate to the Requirement or Requirement Line you intend to waive.
    - Select "Create Exception" next to the Requirement Line you wish to waive.
    - Select "Requirement Waiver" in the dropdown box.
    - Select Go.

a. Enter an explanation in the Long Description field.

b. Select "Save and Reprocess AAR."



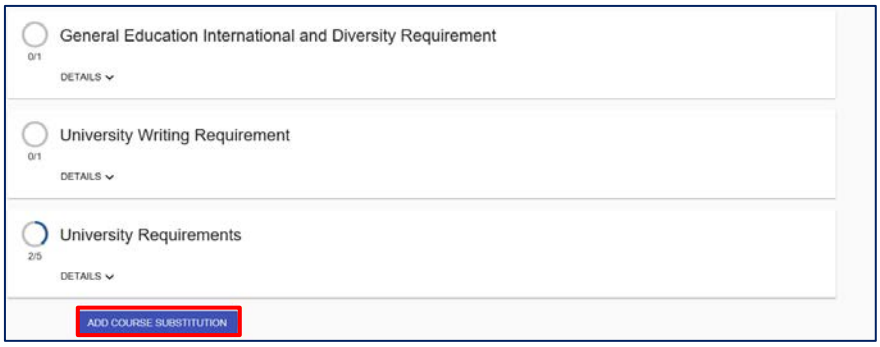
- Note that when you return to the audit, the Requirement Line is neither Met, nor Unmet.



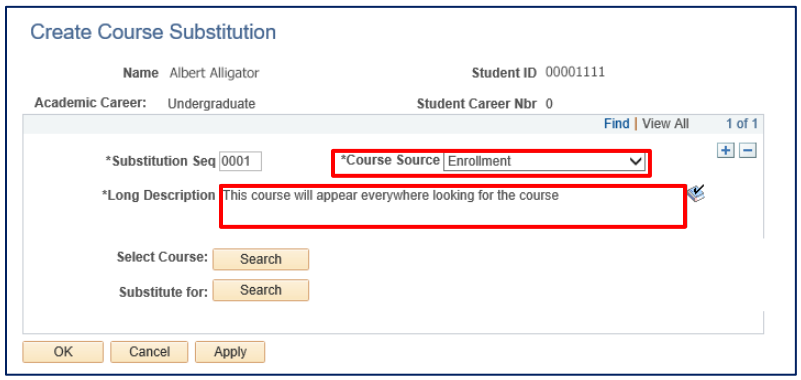
There is a note indicating that this line has been waived.

8. Course Substitutions
   - Course Substitutions put the substituted course into every requirement line that accepts the course for which the substitution is made.
   - Course Substitutions are global in nature: the substituted course will meet requirements across majors, minors, and certificates.

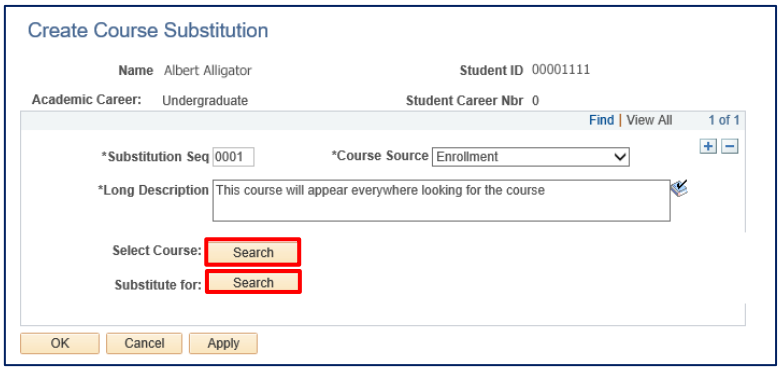
- Should be used sparingly.
- When a student changes majors, the first thing the new college should check are any active course substitutions.
- Course Substitutions can be used for Universal Tracking course requirements, since these requirements change based upon the student's UT milestone level (UT Term).
- To add a Course Substitution, scroll to the bottom of the student's degree audit and select the "Add Course Substitution" button.



- Enter a description for the substitution.
- Select where the course is located (Enrollment, Test, or Transfer courses).



- Search for the course, and the "Substitute for" course.
- Select the magnifying glass to search or enter the Subject Area (prefix) of the course.

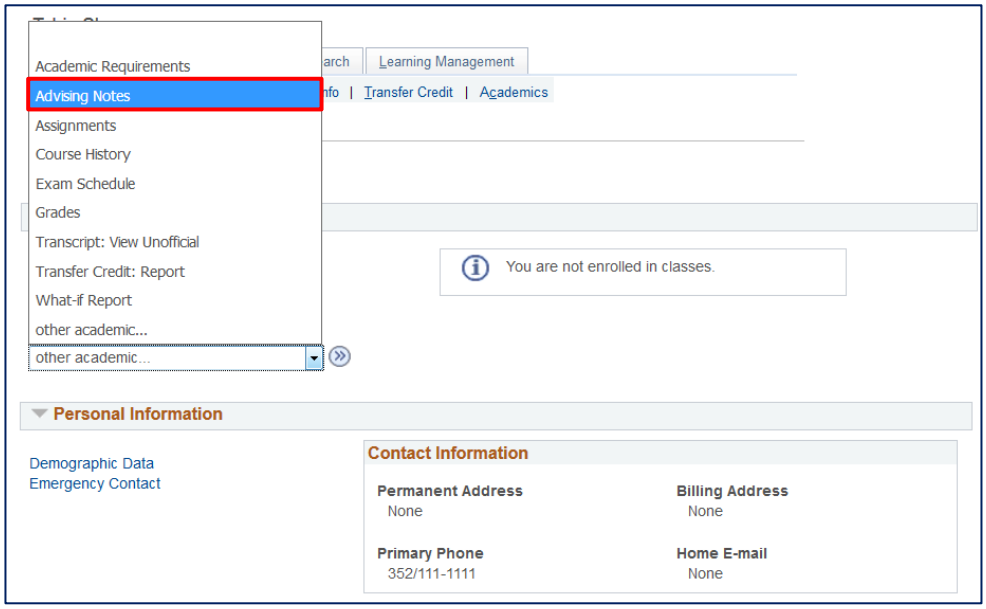


Advising Notes

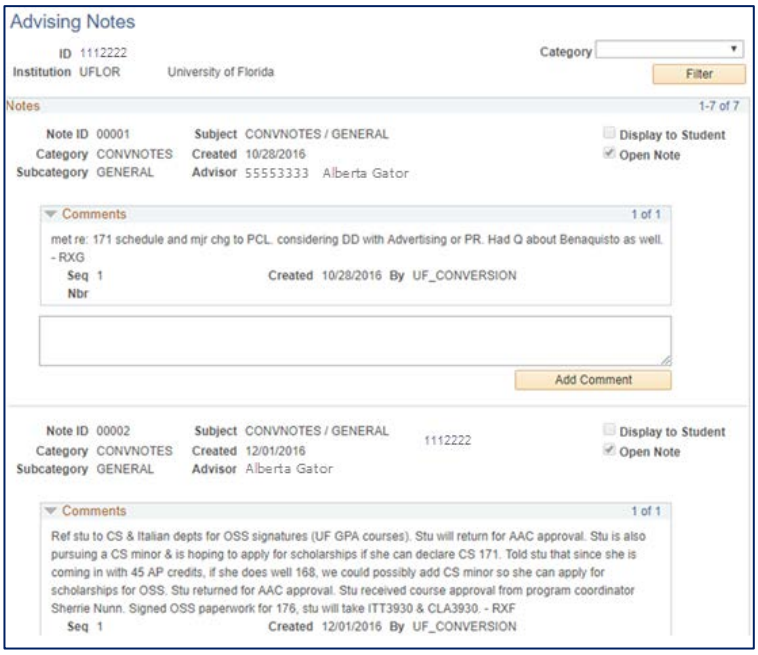
- Advising Notes are used to record conversations and interactions with students regarding their academic record and progress towards the degree.
- The notes are stored by the student's ID and can be seen by other advisors.
- Advisors can flag the notes so they are visible to students in the student center. They must be flagged "Display to Student."
- To view Advising Notes, navigate to myUFL
  > NavBar
  > Main Menu
  > Student Information System
  > Self Service
  > Advisor Center
  > Advisee Student Center.
- Then click on the General Information tab.

Read/Add/Update Advising Notes

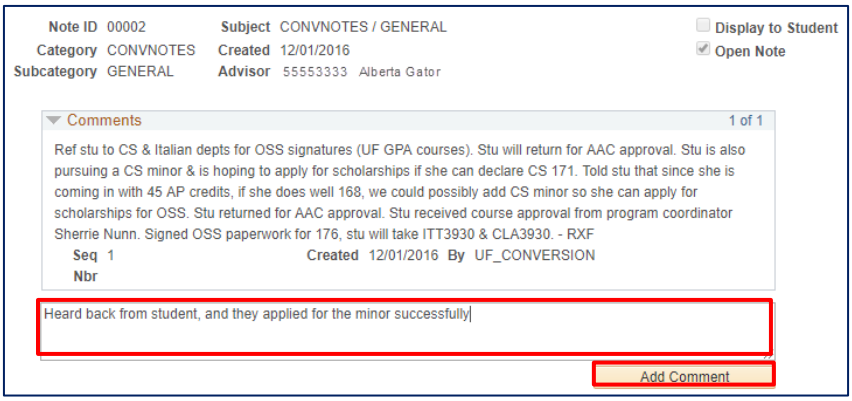
- Navigate to Advisee Student Center.
- Search for student.
- Select "Advising Notes" from the dropdown.



- On this page, advisors can update currently active notes or create new notes at the bottom.

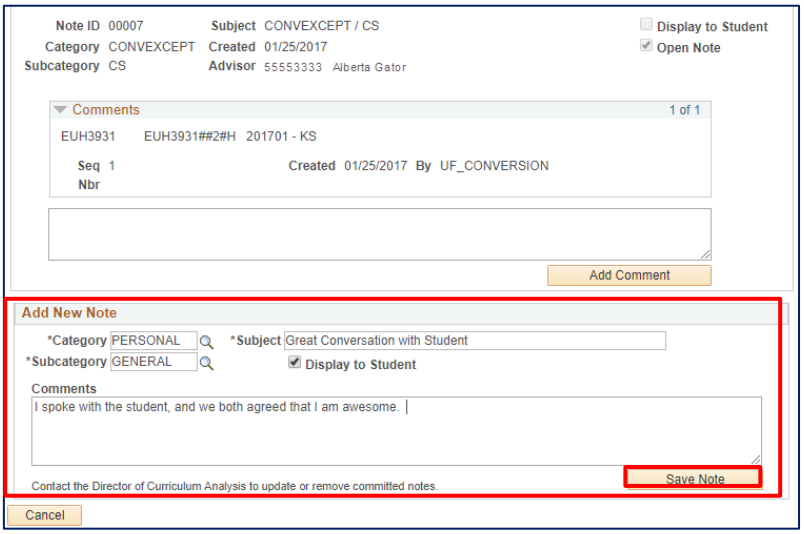


- On the page that appears, advisors can comment on notes that already exist by clicking into the box above “Add Comment,” typing the note, then clicking the button.
- These sub-notes will follow under the original note like a message thread.



9. The sub-note inherits the Category, Subcategory, and Subject from the Note you are updating.

- To add a NEW comment:
    - Scroll to the bottom of the page
    - Select a category/subcategory
    - Type a subject
    - Indicate whether or not to display the note to the student in One.UF
    - Type the note
    - Click “Save Note”



10. To delete a note once it has been created, contact Toby's office.

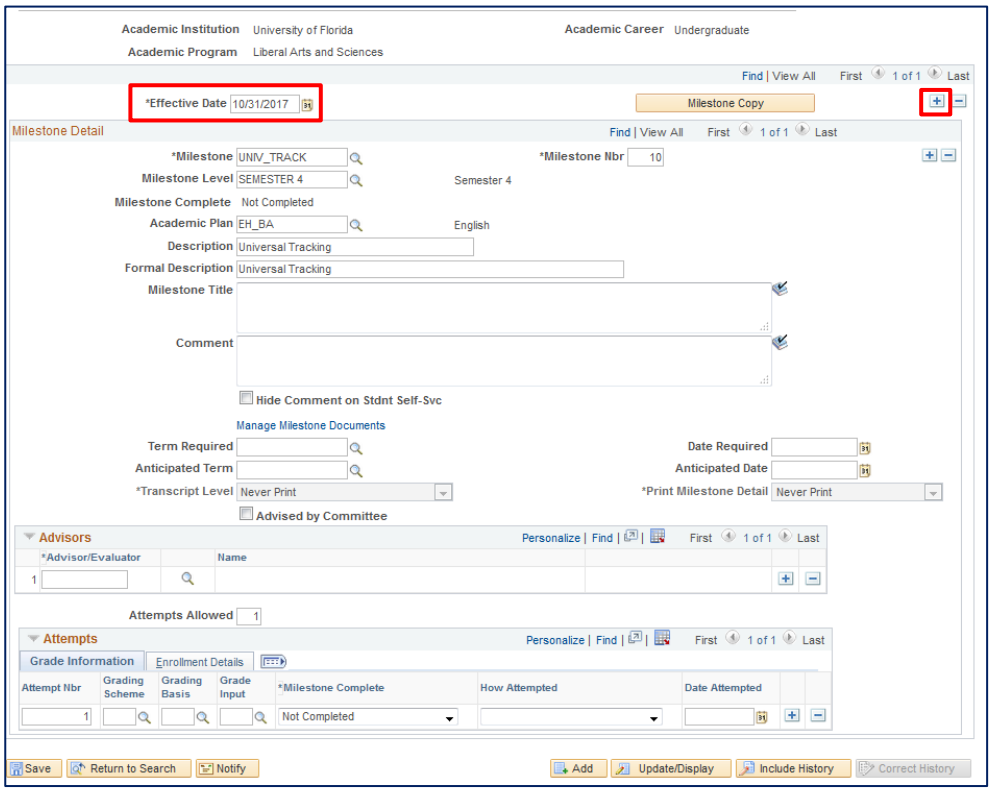
Universal Tracking

11. Reading the Critical Tracking Requirement Group
    - Summary of UT requirements appears first in text above UT requirements.
    - First requirement shows the student their current UT term.
    - UT requirements are set based upon student's UT Milestone Level.

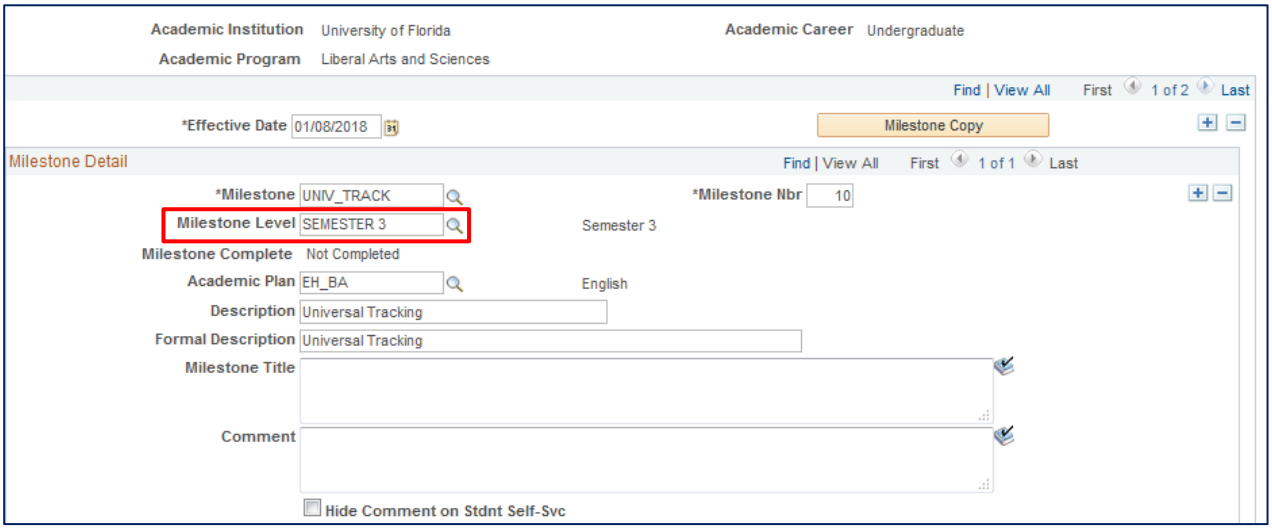
- When a student does not have a UT milestone, or their milestone level is semester 5 or greater, a summary of ALL UT requirements will show on the degree audit.
- Wherever possible, Universal Tracking terms have become cumulative, with prior term requirements adding to the current terms requirements.
- UT Milestones are first set when an undergraduate matriculates based upon:
    - FTICs are set to UT Milestone Level 1
    - Lower Division transfer students have UT Milestone Level set to 3
    - Upper Division transfer students have UT Milestone Level set to 5
    - The system will increment UT terms for students at the beginning of the semester, and will update students that register late on a daily basis
- Navigate to Student Milestones.
- Universal Tracking Terms are Milestone Levels. When changing majors, advisors frequently wish to change the student's UT term.
- If an advisor changes the major and does not touch the UT Milestone Level (UT Term), a process will run overnight to update the Milestone information automatically, changing the Program/Plan information, and assigning the student the same UT term they were in previously.
- If the advisor wishes to change the UT Milestone Level (UT term):
    - Go to the currently active UT Milestone (where the milestone level is NOT INACTIVE).
    - Add a new effective dated row.

- Change the Milestone Level to the UT term that the student should be under for the CURRENT term.

- For example, if the student in this example switched from English to Family Youth and Community Sciences, the FYC advisor would add a new effective dated row to the program Milestones with the English UT info.
- To change a UT Milestone:
  - Click "+" from the Student Milestone screen
  - Effective date will update



- Change the UT term from 4 to 3 and click "Save."



- A batch process will run overnight to adjust the milestones to the correct plans and programs.
- NOTE: The UT term will automatically increment next semester if the student is eligible to increment. Advisor changed UT terms will no longer prevent the UT term from incrementing next semester, so set the UT term accordingly.
- You can now re-run the student's degree audit and note the UT term change in the Critical Tracking section.

What's Next?

- I will generate a report of currently registered undergraduate students with exceptions that need to be entered for each college.
- I need to identify to whom I will send the list in each college.
- Roxanne and I will process all "administrative" exceptions (State General Education core course substitutions, summer requirement exceptions, etc.).
- Report any audit errors through our listserv process for immediate correction by my staff.

Summary/Contact Information

- Today we have covered:
  - Advisee Student Center
  - Audits/WHATIF Audits
  - Milestones
  - Reading/Writing Exceptions
  - Advising Notes
  - Universal Tracking
- Contact:

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Thank you for attending!