Academic Advising in myUFL

PVO100

UF | **myUFL**

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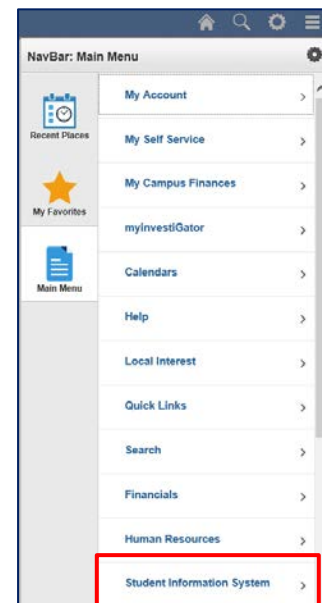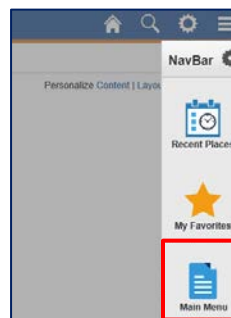
- Enter UFID or last name and first name
- Click Search

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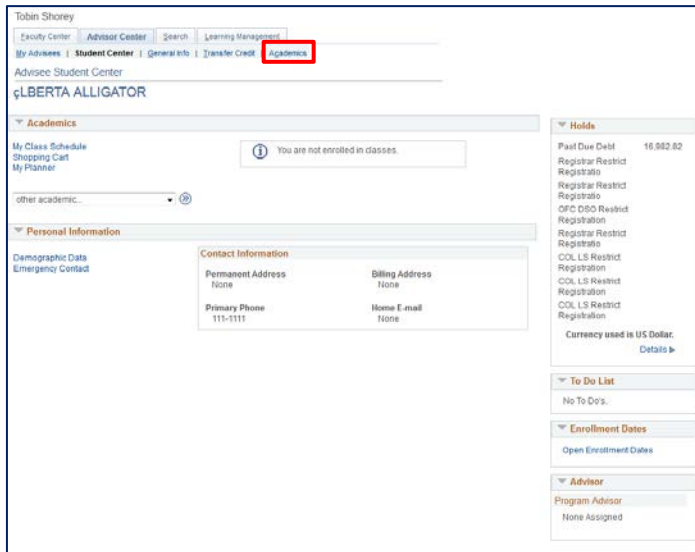
- "Edit Program Data" will not be available if you are not authorized to change student majors (Student Program/Plan) or catalog year (Requirement Term).
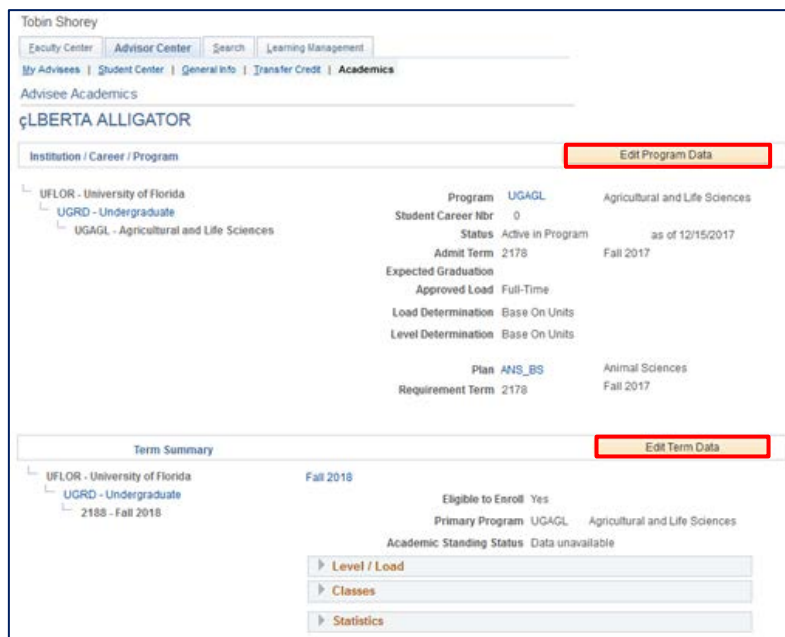
Student Groups

- Any identified group to be tracked

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- 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

Tobin Shorey

| Faculty Center | Advisor Center | Search | Learning Management |

My Advisees | **Student Center** | General Info | Transfer Credit | Academics

Advisee Student Center

çLBERTA ALLIGATOR

▼ **Academics**

My Class Schedule
Shopping Cart
My Planner

(i) You are not enrolled in classes.

other academic...

▼ **Personal Information**

Demographic Data
Emergency Contact

Contact Information

Permanent Address	Billing Address
None	None
Primary Phone	Home E-mail
111-1111	None

▼ **Holds**

Past Due Debt   16,982.82
Registrar Restrict Registratio
Registrar Restrict Registratio
OFC DSO Restrict Registration
Registrar Restrict Registratio
COL LS Restrict Registration
COL LS Restrict Registration
COL LS Restrict Registration

Currency used is US Dollar.
Details ▶

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.

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- 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 >>.

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Faculty Center | Advisor Center | Search | Learning Management

My Advisees | **Student Center** | General Info | Transfer Credit | Academics

Advisee Student Center

çLBERTA ALLIGATOR

▼ Academics

My Class Schedule
Shopping Cart
My Planner

ⓘ You are not enrolled in classes.

other academic...

Academic Requirements
Advising Notes
Assignments
Course History
Exam Schedule
Grades
Transcript: View Unofficial
Transfer Credit: Report
What-if Report

Contact Information

Permanent Address
None

Billing Address
None

Primary Phone
352/111-1111

Home E-mail
None

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

◯ 2/10 Requirement Groups Met

This report last generated on: 12/19/2017 2:59PM

University of Florida | Undergraduate

COLLAPSE ALL   EXPAND ALL

Completed at UF	In Progress	Planned	2-Year Transfer
4-Year Transfer	Exam or Test	Internal Transfer	Other Transfer
Other Course			

✓ Requirement Satisfied   ⦿ Requirement Satisfied-IP Course   ✗ Requirement Not Satisfied

BACHELOR OF SCIENCE WITH A MAJOR IN BIOLOGY - PREPROFESSIONAL

Bachelor of Science with a major in Biology - Preprofessional - 120 Credit Program

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

◯ 2/10 Requirement Groups Met

This report last generated on: 12/19/2017 2:59PM

University of Florida | Undergraduate

COLLAPSE ALL   EXPAND ALL

Completed at UF	In Progress	Planned	2-Year Transfer
4-Year Transfer	Exam or Test	Internal Transfer	Other Transfer
Other Course			

✓ Requirement Satisfied   ⦿ Requirement Satisfied-IP Course   ✗ Requirement Not Satisfied

BACHELOR OF SCIENCE WITH A MAJOR IN BIOLOGY - PREPROFESSIONAL

Bachelor of Science with a major in Biology - Preprofessional - 120 Credit Program

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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

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- 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
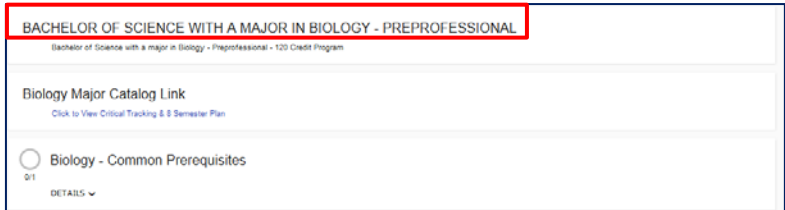
Requirement Groups

- 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

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- 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.

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- "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

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Critical Tracking Courses

HIDE ∧

Not Satisfied: Complete two of the following: CHM2045/2045L, MAC2311, or BSC2010/2010L

❌ CHM2045 - General Chemistry 1
Not Satisfied:

- Units: 3.00 required, 0.00 taken, 3.00 needed
- Courses: 1 required, 0 taken, 1 needed

❌ CHM2045L - General Chemistry 1 Lab
Not Satisfied:

- Units: 1.00 required, 0.00 taken, 1.00 needed
- Courses: 1 required, 0 taken, 1 needed

✅ MAC2311 - Analytical Geometry & Calculus 1
Satisfied:

The following courses were used to satisfy this requirement:

Course	Description	Units	When	Grade	Status
MAC2311	Analyt Geom and Calc 1	4.00	Fall 2016	C+	UF

❌ BSC2010 - Integrative Principles of Biology 1
Not Satisfied:

- Units: 3.00 required, 0.00 taken, 3.00 needed
- Courses: 1 required, 0 taken, 1 needed

❌ BSC2010L - Integrative Principles of Biology 1 Lab
Not Satisfied:

- Units: 1.00 required, 0.00 taken, 1.00 needed
- Courses: 1 required, 0 taken, 1 needed

> Requirement Lines are separated by grey lines

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.

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Biology - Preprofessional Core Requirement

Not Satisfied:

• Units: 28.00 required, 0.00 taken, 28.00 needed

Genetics
Not Satisfied: Select 1 of the following: PCB3063, PCB4522, AGR3303

• Units: 3.00 required, 0.00 taken, 3.00 needed

Physiology
Not Satisfied: Select from: PCB4723C, PCB3713C, BSC3096

• Units: 5.00 required, 0.00 taken, 5.00 needed

CELLULAR BIOLOGY OPTION 1: MCB3020 & MCB3020L - Basic Bio Microorganisms & Lab
Not Satisfied: (These course swill not count for both the major requirement and as ALS elective credit)

• Units: 4.00 required, 0.00 taken, 4.00 needed
• Courses: 2 required, 0 taken, 2 needed

CELLULAR BIOLOGY OPTION 2: PCB3134 - Eukaryotic Cell Structure & Function
Not Satisfied:

• Units: 3.00 required, 0.00 taken, 3.00 needed

BSC4936 - Critical Analysis of Biological Research
Not Satisfied:

• Units: 2.00 required, 0.00 taken, 2.00 needed

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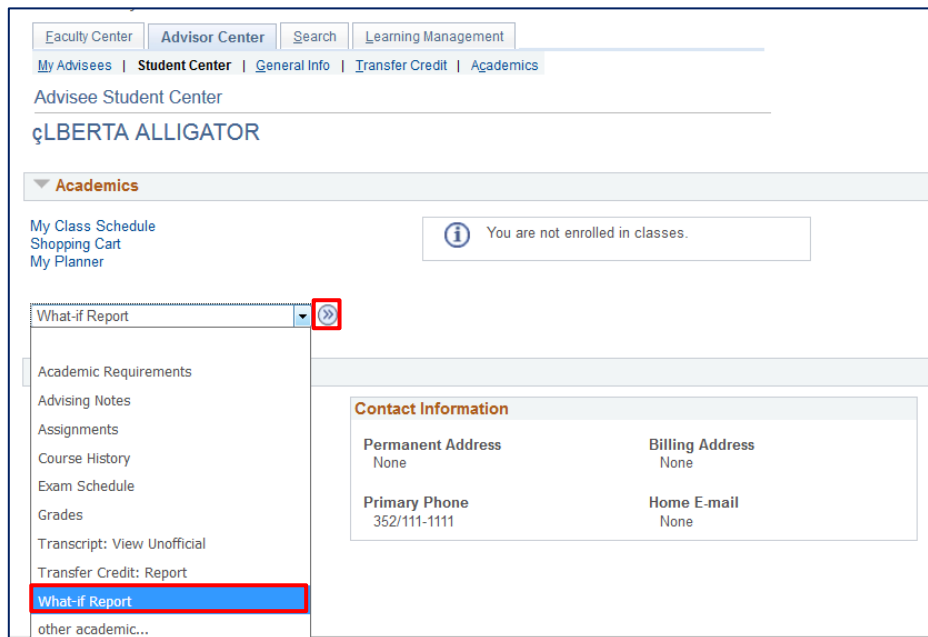
- Click "Create New Report" to create a new combination.
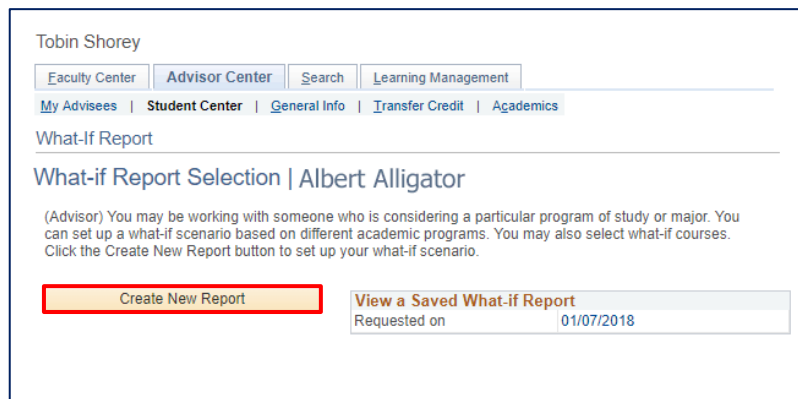
- Note: If a WHATIF report has been recently run for a student, it will appear as a link next to the Create New Request button. It is always recommended to create a new request.
- Review relevant Career and Requirement Term (Catalog Year).

- 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.

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Program Scenario

The information that appears on the page by default is your current academic information. You
can use the fields below to set up a what-if scenario based on one or more programs of study.
You can define up to five scenarios.

Academic Program	Area of Study	Concentration
Business - Undergraduate	Bus Admin-General Studies - BA in Business Administration	n/a
Liberal Arts and Sciences - Non-Degree	Liberal Arts and Sciences Undergraduate Certificate	European Jewish Studies - CRT
None	None	None
None	None	None
None	None	None

Course Scenario

Select the "browse course catalog" button and then select courses for inclusion in your course
what-if scenario.

Browse Course Catalog
What-If Course List   Personalize | View All | 🗗   First ◀ 1 of 1 ▶ Last
Course

- 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+.

Course Scenario

Select the "browse course catalog" button and then select courses for inclusion in your course
what-if scenario.

Browse Course Catalog

What-If Course List   Personalize | View All | 🗗   First ◀ 1 of 1 ▶ Last

Course	Description	Units	*Term	Grade	Delete
JST 2930	Special Topics in Jewish Studies	3.00	Spring 2018 ▼	C+ 🔍	🗑

Submit Request

- Click "Submit Request" to view audit

Course Scenario

Select the "browse course catalog" button and then select courses for inclusion in your course what-if scenario.

Browse Course Catalog

What-If Course List			Personalize | View All | 🗗	First ◀ 1 of 1 ▶ Last		
Course	Description	Units	*Term		Grade	Delete
JST 2930	Special Topics in Jewish Studies	3.00	Spring 2018 ▼		C+ 🔍	🗑

Submit Request

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

○ Linguistics Minor
0/2
    DETAILS ∨

Summary of All Academic Credit

University of Florida Courses
DETAILS ∨

Transfer Credit
DETAILS ∨

Test Credit
DETAILS ∨

Other Credit
DETAILS ∨

Go to top
CANCEL

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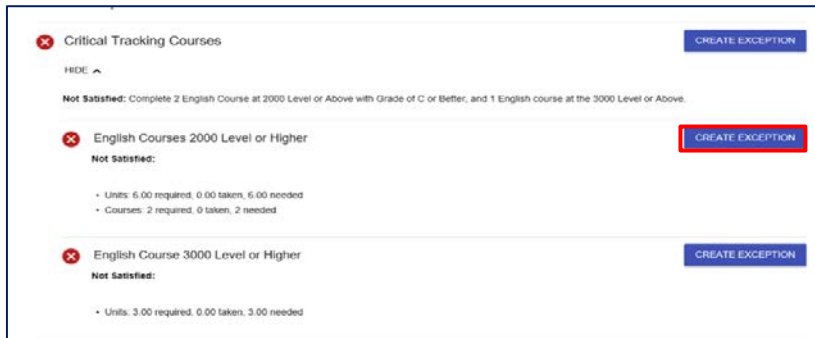
- Next we will cover how to read, write, or update exceptions and advising notes. Let's begin with reading exceptions.

Reading Exceptions

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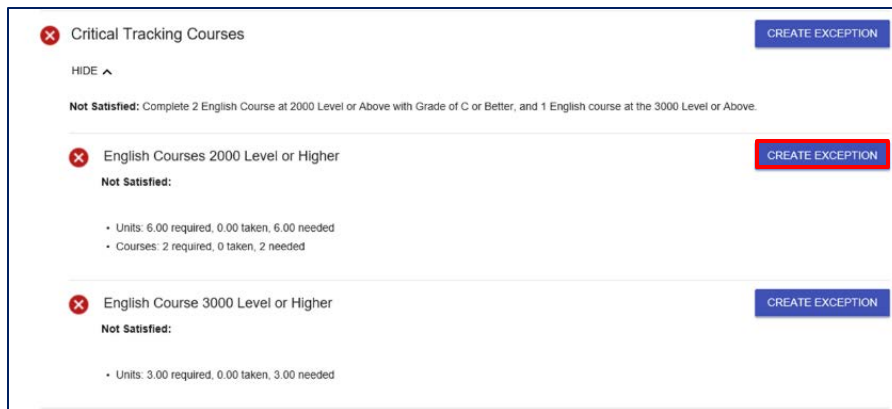
- Course Directives
    - Will insert or remove a course in a particular Requirement Line
    - Not available at the Requirement Level
    - To use a Course Directive, navigate to the student's Degree Audit and open the particular Requirement Line that requires the change.

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.

Key information needed to create the exception has been generated.

- 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

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- 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.

- 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.

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- 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".

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- 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.

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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.
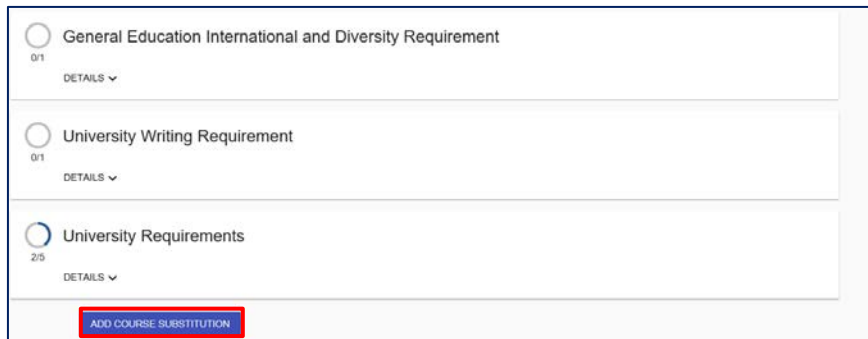
- Enter a description for the substitution.
- Select where the course is located (Enrollment, Test, or Transfer courses).
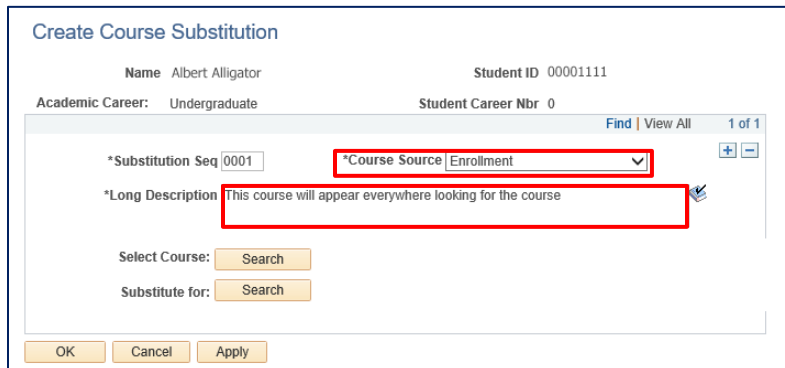
- Search for the course, and the "Substitute for" course.
- Select the magnifying glass to search or enter the Subject Area (prefix) of the course.

PVO100: Academic Advising in myUFL   January 25, 2018
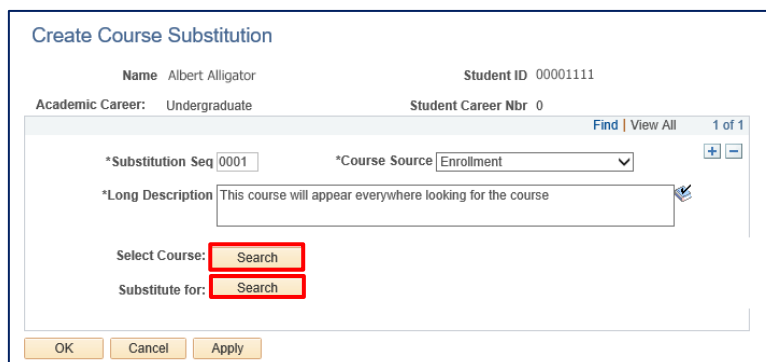
Advising Notes
_____

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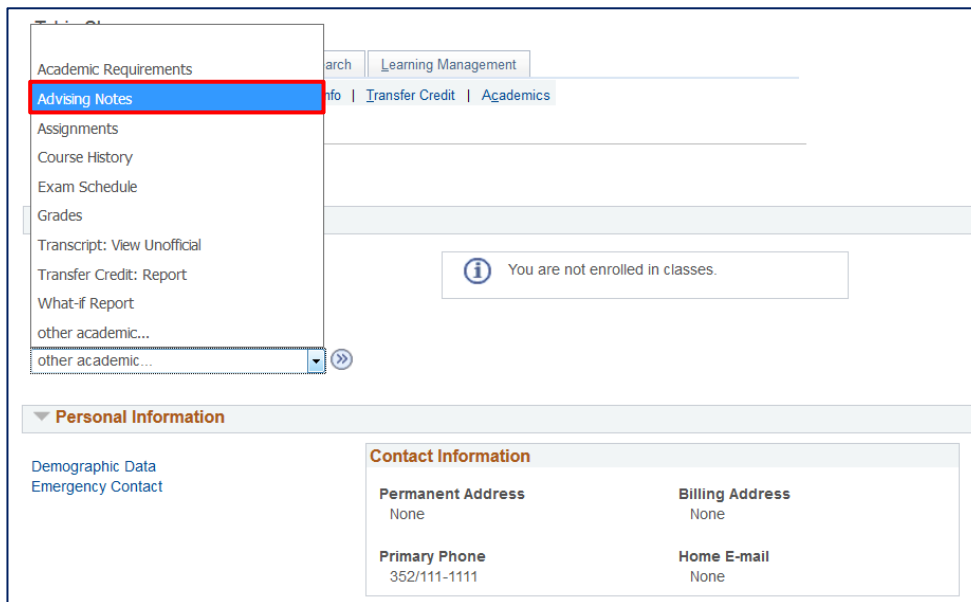
- On this page, advisors can update currently active notes or create new notes at the bottom.

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Advising Notes

ID 1112222
Institution UFLOR   University of Florida
Category [▼]   [Filter]

Notes   1-7 of 7

Note ID 00001   Subject CONVNOTES / GENERAL   ☐ Display to Student
Category CONVNOTES   Created 10/28/2016   ☑ Open Note
Subcategory GENERAL   Advisor 55553333 Alberta Gator

▼ Comments   1 of 1

met re: 171 schedule and mjr chg to PCL. considering DD with Advertising or PR. Had Q about Benaquisto as well.
- RXG
Seq 1   Created 10/28/2016 By UF_CONVERSION
Nbr

[   ]
[Add Comment]

Note ID 00002   Subject CONVNOTES / GENERAL   1112222   ☐ Display to Student
Category CONVNOTES   Created 12/01/2016   ☑ Open Note
Subcategory GENERAL   Advisor Alberta Gator

▼ Comments   1 of 1

Ref stu to CS & Italian depts for OSS signatures (UF GPA courses). Stu will return for AAC approval. Stu is also pursuing a CS minor & is hoping to apply for scholarships if she can declare CS 171. Told stu that since she is coming in with 45 AP credits, if she does well 168, we could possibly add CS minor so she can apply for scholarships for OSS. Stu returned for AAC approval. Stu received course approval from program coordinator Sherrie Nunn. Signed OSS paperwork for 176, stu will take ITT3930 & CLA3930. - RXF
Seq 1   Created 12/01/2016 By UF_CONVERSION

- 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.

Note ID 00002   Subject CONVNOTES / GENERAL   ☐ Display to Student
Category CONVNOTES   Created 12/01/2016   ☑ Open Note
Subcategory GENERAL   Advisor 55553333 Alberta Gator

▼ Comments   1 of 1

Ref stu to CS & Italian depts for OSS signatures (UF GPA courses). Stu will return for AAC approval. Stu is also pursuing a CS minor & is hoping to apply for scholarships if she can declare CS 171. Told stu that since she is coming in with 45 AP credits, if she does well 168, we could possibly add CS minor so she can apply for scholarships for OSS. Stu returned for AAC approval. Stu received course approval from program coordinator Sherrie Nunn. Signed OSS paperwork for 176, stu will take ITT3930 & CLA3930. - RXF
Seq 1   Created 12/01/2016 By UF_CONVERSION
Nbr

[Heard back from student, and they applied for the minor successfully|]
[Add Comment]

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"

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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.

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- 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."

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- 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:

  Toby Shorey

  Director of Curriculum Monitoring & Analysis

  Office of Undergraduate Affairs

  238 B Tigert Hall

  tshorey@ufl.edu

Thank you for attending!

Advisee's Student Center

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID: begins with ▼ [_____] 🔍
Campus ID: begins with ▼ [_____]
National ID: begins with ▼ [_____]
Last Name: begins with ▼ [_____]
First Name: begins with ▼ [_____]

☐ Case Sensitive

[Search]   [Clear]   Basic Search 🔳 Save Search Criteria

Search Results

View All   First ④ 1-2 of 2 ⓑ Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
00000542	Alligator,Albert	Unknown	**/**/****	(blank)	*********	USA	SSN	ALLIGATOR	ALBERT
02062630	Alligator,Alberta B	Female	**/**/****	(blank)	*********	USA	SSN	ALLIGATOR	ALBERTA

3. From the dropdown menu, select **Advising Notes**.

Faculty Center | Advisor Center | Search | Learning Management

My Advisees | **Student Center** | General Info | Transfer Credit | Academics

Advisee Student Center

Alberta Alligator

▼ Academics

My Class Schedule
Shopping Cart   ⓘ You are not enrolled in classes.
My Planner

[other academic... ▼] ⓥ

Academic Requirements

Advising Notes

Assignments   **Contact Information**

Course History   **Permanent Address**   **Billing Address**
                                None   None
Exam Schedule

Grades   **Primary Phone**   **Home E-mail**
                                352/111-1111   None
Transcript: View Unofficial

4. Scroll down on the audit to the Add New Note section. Click the **search icon next** to the category field.

5. Click **Look up**.

6. Click the **type of note** you would like to add.

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7. Click the **search icon** next to the category field.

8. Click **Look Up**.

9. Click the **subcategory type**.

10. Enter the **Subject**.

11. Enter **Comments**.

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Resource Services
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12. Click **Save Note**.

ADDITIONAL HELP

Further resources are available at http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising, contact Tobin Shorey tshorey@ufl.edu.

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Student Information System

ADVISOR LINKS

This instruction guide outlines how to add the Advisor Links menu item to your NavBar in myUFL. Advisor Links are pages frequently used by advisors.

NAVIGATION AND PROCESS

Use the following navigation to navigate to the Student Services Center:

1. Click the **NavBar** icon
2. Click **Main Menu**
3. Click the **Gear (settings)** icon
4. Click **Add Tile**
5. Click in the **Search** box and enter **Advisor**
6. Click the **Search** button
7. Click on **Advisor Links**
   a. **Advisor Links** now appears in the Personalize NavBar list
8. Click the **Done** button
9. The **Advisor Links** icon now appears in the NavBar

FOR ADDITIONAL ASSISTANCE

Technical Issues
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

ACADEMIC ADVISING: BULK COURSE DIRECTIVES

Advisors may use the Bulk Course Directive functionality to place courses into specific Requirement Lines on a Degree Audit. This feature allows for placing multiple courses into one Requirement Line simultaneously as well as placing a single course onto multiple Requirement Lines with one action.

NAVIGATION

After logging into myUFL, use one of the following navigation paths:

Advisee Student Center:

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

Student Services Center:

NavBar > Main Menu > Student Information System > Campus Community > Student Services Center

ENTER A BULK COURSE DIRECTIVE

1. Search for the student by UFID or first and last name that needs the requirement waiver. Click **Search**.

2. Click on the **student's name** to view their degree audit.

3. From the dropdown menu, select **Academic Requirements**. Then, click the **arrow icon**.

4. The audit loads. Select **Collapse All**.

5. Select the **Requirement Group**.

6. Select the **Requirement Line**.

7. Click the **Create Exception drop down menu**.

8. Select **Bulk Crse Directive** and click the **arrow icon**.

9. The **Bulk Course Directive** screen appears.

    Note: You may need to scroll to the left or right to view information.

10. On the right side of the screen, locate the first **Requirement Line** from which you arrived on this page.

11. Locate any additional **Requirement Lines**.

12. **Scroll** back to the left.

13. Find the **course** on the left for which you want to enter a Course Directive.

14. Enter the **Requirement Line Numbers** from the right hand of the screen, separated by a comma (no spaces).

Crse	Reqs	Institution	Term Taken	External Subject / Catalog Nbr	Ext Crse Descr	Units Accepted	Grade
x1		Eastern Florida State College	2014 FALL	ENC 1101	COMMUNICATIONS 1	3.000	C
x2		Eastern Florida State College	2014 FALL	REL 2300	WORLD RELIGIONS	3.000	C
x3		Eastern Florida State College	2014 FALL	SYG 2000	INTRO TO SOCIOLOGY	3.000	B
x4		Eastern Florida State College	2014 SUMR	SLS 1101	SUCCESS STRATEGIES	3.000	B
x5		Eastern Florida State College	2014 SUMR	SPC 2608	FUNDS OF SPEECH	3.000	B
x6		Eastern Florida State College	2015 SPR	AST 1002	INTRO TO ASTRONOMY	3.000	E
x7		Eastern Florida State College	2015 SPR	ENC 1102	COMMUNICATIONS 2	3.000	W
x8		Eastern Florida State College	2015 SPR	PSY 2012	GEN PSYCHOLOGY	3.000	D
x9		Santa Fe College Florida	2015 FALL	ENC 1102	COLLEGE COMP 2	3.000	A
x10	18,23	Santa Fe College Florida	2015 FALL	HUM 2020	INTRO TO HUM	3.000	B

15. Select **Save and Process** at the bottom of the Bulk Course Directive screen.

16. Enter **Comments** for Requirement Number 18.

17. Select **OK**.

Provide Comments

Comments TJS

Personalize | Find | | First 1 of 1

Req Num	Group	Requirement	Line
18	UF Quest and State Core Gen Ed	State General Education Requirement	Humanities

Personalize | Find | | F

Courses	Crse/Trans/Test/Other
x10	Add - Transfer Credit: Santa Fe College Florida 2015 FALL HUM 2020

OK   Cancel

18. Enter **Comments** for Requirement Line Number 23.

19. Select **OK**.

20. Return to the Degree Audit to check that the Course Directives have been properly applied.

21. Select **Collapse All**.

22. Scroll down and select the **Requirement Group** for the first Requirement for which you created a directive.

23. Select the **Requirement Line** for the first Requirement for which you created a directive.

24. Verify the **Course Directive** was properly applied.

25. Select the **Requirement Group** for the second Requirement for which you created a directive.

26. Select the **Requirement Line** for the second Requirement for which you created a directive.

27. Verify the **Course Directive** was properly applied.

28. You can also get to the Bulk Course Directive page by selecting the **Bulk Course Directive button** at the bottom of the audit. If a Course Directive has already been entered for a student, it will be visible on this page. You can double check that the Course Directives appear correctly. You can also delete the Course Directive from this page and click Save and Reprocess.

29. Double check that the **Course Directives** appear correctly.

x1		Eastern Florida State College	2014 FALL	ENC 1101	COMMUNICATIONS 1	3.000	C
x2		Eastern Florida State College	2014 FALL	REL 2300	WORLD RELIGIONS	3.000	C
x3		Eastern Florida State College	2014 FALL	SYG 2000	INTRO TO SOCIOLOGY	3.000	B
x4		Eastern Florida State College	2014 SUMR	SLS 1101	SUCCESS STRATEGIES	3.000	B
x5		Eastern Florida State College	2014 SUMR	SPC 2608	FUNDS OF SPEECH	3.000	B
x6		Eastern Florida State College	2015 SPR	AST 1002	INTRO TO ASTRONOMY	3.000	E
x7		Eastern Florida State College	2015 SPR	ENC 1102	COMMUNICATIONS 2	3.000	W
x8		Eastern Florida State College	2015 SPR	PSY 2012	GEN PSYCHOLOGY	3.000	D
x9		Santa Fe College Florida	2015 FALL	ENC 1102	COLLEGE COMP 2	3.000	A
x10	18,23	Santa Fe College Florida	2015 FALL	HUM 2020	INTRO TO HUM	3.000	B

30. Course **x10** now also appears on the appropriate Requirement Lines.

16		UF Quest and State Core Gen Ed	University Required Course	IUF1000 - What is the Good Life
17			State General Education Requirement	Composition
18	x10			Humanities
19				Social and Behavioral Science
20				Mathematics
21				Biological and Physical Sciences
22		CLAS Basic Distribution Requirements	Composition (6 Credits)	Composition
23	x10		Humanities (9 Credits)	Humanities

31. If no changes were made, scroll to the bottom of the page and select **Cancel**.

ADDITIONAL HELP

Further resources are available at https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising, contact Tobin Shorey, tshorey@ufl.edu.

ACADEMIC ADVISING: COURSE DIRECTIVES

- Will insert or remove a course in a particular Requirement Line
- Not available at the Requirement Level
- Are the most common type of exception

NAVIGATION

After logging into myUFL, use one of the following navigation paths:

Advisee Student Center:

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

Student Services Center:

NavBar > Main Menu > Student Information System > Campus Community > Student Services Center

ENTER A COURSE DIRECTIVE

1. Search for the student by UFID or first and last name that needs the requirement waiver. Click **Search**.

Student Services Center

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

ID: [begins with ▾] 55551212 ✕
Campus ID: [begins with ▾]
National ID: [begins with ▾]
Last Name: [begins with ▾]
First Name: [begins with ▾]

☐ Case Sensitive

[Search] [Clear] Basic Search 🔍 Save Search Criteria

2. Click on the student's name to view their degree audit.

Advisee's Student Center

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

ID: [begins with ▾] [_____] 🔍
Campus ID: [begins with ▾] [_____]
National ID: [begins with ▾] [_____]
Last Name: [begins with ▾] [ALLIGATOR   ×]
First Name: [begins with ▾] [_____]

☐ Case Sensitive

[Search] [Clear] Basic Search 🔲 Save Search Criteria

Search Results

View All   First ◄ 1-2 of 2 ► Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
55551212	Alligator,Albert	Unknown	**/**/****	(blank)	*********	USA	SSN	ALLIGATOR	ALBERT

3. From the dropdown menu, select **Academic Requirements**. Then, click the **arrow icon**.

Albert Alligator   ID 55551212   ★

[**Student Center**] [General Info] [Admissions] [Transfer Credit] [Academics] [Finances] [Financial Aid]

Albert's Student Center

| Academic Requirements |
| Advising Notes |
| Assignments |
| Course History |
| Exam Schedule |
| Grades |
| Transcript: View Unofficial |
| Transfer Credit: Report |
| What-if Report |
| other academic... | 《》

📅 Deadlines   📄 URL   ✅ Gradebook

This Week's Schedule

	Class	Schedule	Units
📅	CHM 2211L-7056 LAB (10904) Regular Academic Session	Mo 11:00AM - 3:15PM Joseph Hernandez Hal 210 We 11:00AM - 1:45PM Joseph Hernandez Hal 210	2.00

4. The audit loads. Select **Collapse All**.

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UF | myUFL

Student Information System

5. Select the **Requirement Group**.

6. Select the **Requirement Line**.

7. Click the Create Exception drop down menu and select **Crse Directive** and click the **arrow icon**.

8. Enter the **Long Description**.

9. Select the **Course Source drop down menu**.

10. Click on **Transfer Courses**.

11. Click **Search**.

12. Enter **Subject Area**.

13. Click **Search**.

14. Select **Course Subject check box** and click **Return**.

15. Scroll down to the bottom of the audit and select **Save and Return**.

16. Return to the Degree Audit and make sure the new course appears.

ADDITIONAL HELP

Further resources are available at https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising, contact Tobin Shorey, tshorey@ufl.edu.

ADVISING: COURSE SUBSTITUTION

- Replaces every instance of a course on a student's degree audit
- Impacts the entire audit
- Should be used sparingly

NAVIGATION

After logging into myUFL, use one of the following navigation paths:

Advisee Student Center:

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

Student Services Center:

NavBar > Main Menu > Student Information System > Campus Community > Student Services Center

ENTER A COURSE SUBSTITUTION

1. Search for the student's Degree Audit by either UFID or first and last name. Then, click **Search**.

2. When the search results load, click on the **student's name** or **UFID** to access the degree audit.

3. On the Advisee Student Center, select **Academic Requirements** from the dropdown menu. Then, click the **arrow icon**.

4. The Degree Audit appears. Select **Collapse All**.

5. Scroll down to the bottom of the audit and select the type of course you wish to substitute. In this example, we will select **Transfer Credit**.

▷ **University of Florida Courses**

▷ **Transfer Credit**

▷ **Test Credit**

▷ **Other Credit**

6. Locate the course you wish to substitute.

Institution	Term Taken	External Subject / Catalog Nbr	Units Taken	Grade Input	Status	Equivalent Subject / Catlg Nbr	Units Accepted	Grade
Eastern Florida State College	2014 FALL	ENC 1101	3.00	C	Posted	ENC 1101	3.000	C
Eastern Florida State College	2014 FALL	REL 2300	3.00	C	Posted	REL 2300	3.000	C
Eastern Florida State College	2014 FALL	SYG 2000	3.00	B	Posted	SYG 2000	3.000	B
Eastern Florida State College	2014 SUMR	SLS 1101	3.00	B	Posted	SLS L000	3.000	B
Eastern Florida State College	2014 SUMR	SPC 2608	3.00	B	Posted	SPC 2608	3.000	B
Eastern Florida State College	2015 SPR	AST 1002	3.00	E	Posted	AST 1002	3.000	E
Eastern Florida State College	2015 SPR	ENC 1102	3.00	W	Posted	ENC 1102	3.000	W
Eastern Florida State College	2015 SPR	PSY 2012	3.00	D	Posted	PSY 2012	3.000	D
Santa Fe College Florida	2015 FALL	ENC 1102	3.00	A	Posted	ENC 1102	3.000	A
Santa Fe College Florida	2015 FALL	HUM 2020	3.00	B	Posted	HUM L000	3.000	B
Santa Fe College Florida	2015 FALL	MAT 1033	3.00	B	Posted	MAT L000	3.000	B
Santa Fe College Florida	2016 FALL	AMH 2020	3.00	A	Posted	AMH 2020	3.000	A
Santa Fe College Florida	2016 FALL	AMH 2091	3.00	A	Posted	AMH L000	3.000	A

7. Scroll down to the bottom of the audit and select **Add Course Substitution**.

8. Select the Course Source drop-down menu. In this example, we will select **Transfer Courses**.

9. Enter **Long Description**.

10. Click **Search**.

11. Enter **Subject Area**.

12. Click **Search**.

Student Course Subs Search

Academic Institution University of Florida

Subject Area AMH

Search

Return

13. Select the **check box** for the desired class.

Course Selection

Personalize | Find | View All | 🔳 | 🔢   First ⨀ 1-2 of 2 ⨀ Last

	Subject	Catalog	
☑	AMH	L000	Transfer AMH Course
☑	AMH	2020	Us Since 1877

Return

14. Select **Search**.

Create Course Substitution

Name Albert Alligator   Student ID 55551212

Academic Career: Undergraduate   Student Career Nbr 0

Find | View All   1 of 1

*Substitution Seq 0001   *Course Source Transfer Courses ⌄   ➕ ➖

*Long Description Course Sub for AMH2631

Select Course: Search   027870   AMH   L000   Transfer AMH Course

Substitute for: Search

15. Enter **Subject Area**.

16. Click **Search**.

Student Course Subs Search

Academic Institution University of Florida
Subject Area AMH × 🔍 American History

Search

Return

17. To view more subjects, select **View 100**. Then scroll down to the class you want to create a substitution for.

☑	AMH	2093	Africa-Am His 1877-Pr
☑	AMH	2631	His of Sustainability
☑	AMH	2631	His of Sustainability

18. Select **OK**.

Create Course Substitution

Name Albert Alligator   Student ID 55551212
Academic Career: Undergraduate   Student Career Nbr 0

Find | View All   1 of 1

*Substitution Seq 0001   *Course Source Transfer Courses ▾   ➕ ➖

*Long Description Course Sub for AMH2631

Select Course: Search   027870   AMH   L000   Transfer AMH Course
Substitute for: Search   026355   AMH   2631   His of Sustainability

OK   Cancel   Apply

19. Return to audit and make sure the substitution appears. This is shown by a **check mark**.

▼ (11)-9 Credits Must Be from American or European History Courses ⬤

Satisfied: create exceptior ▾ ≫

The following courses were used to satisfy this requirement:

Personalize | View All | 🔲   First ◀ 1-5 of 5 ▶ Last

Course	Description	Units	When	Grade	Notes	Status
AMH L000	Transfer AMH Course	3.00	Summer 2017	A	04	T2
AMH2020	Us Since 1877	3.00	Summer 2017	A		T2
AMH3593	Oral History	3.00	Summer 2018			IP
AMH3931	Special Topics/Am His	3.00	Summer 2017	C		UF
AMH3931	Special Topics/Am His	3.00	Summer 2018			IP

Eastern Florida State College	2015 SPR	PSY 2012	3.00	D	Posted	PSY 2012	3.000	D	
Santa Fe College Florida	2015 FALL	ENC 1102	3.00	A	Posted	ENC 1102	3.000	A	
Santa Fe College Florida	2015 FALL	HUM 2020	3.00	B	Posted	HUM L000	3.000	B	
Santa Fe College Florida	2015 FALL	MAT 1033	3.00	B	Posted	MAT L000	3.000	B	
Santa Fe College Florida	2016 FALL	AMH 2020	3.00	A	Posted	AMH 2020	3.000	A	
Santa Fe College Florida	2016 FALL	AMH 2091	3.00	A	Posted	AMH L000	3.000	A	☑

ADDITIONAL HELP

Further resources are available at https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising, contact the Toby Shorey, tshorey@ufl.edu.

VIEWING STUDENTS WHO REQUIRE EXCEPTIONS

The following instruction guide will walk you through how to view student who require exceptions on both the former Student Admin Degree Audit and the new myUFL Degree Audit.

NAVIGATION

Navigate and log into Student Admin:

1. Go to the web address **my.ufl.edu**
2. Log in with your **GatorLink Username and Password**
3. Click the **NavBar** icon
4. Click **Main Menu**
5. Click **Quick Links**
6. Click **Student Admin**
7. In the **Jump** field in the upper left-hand corner of the screen enter **csps**.
8. Click the **arrow** to go to the page.

FILTERS

There are several filter options which allow you to narrow down your search results.

- **Filter List by College**: Select a specific college
- **Curr Reg**: Select students who are currently registered, not currently register, or all students
- **Fall Reg**: Select students who are registered for fall, not registered for fall, or all students
- **Elig to Reg**: Select students who are eligible to register, not eligible to register, or all students
- **Grad**: Select students who have applied to graduate, have no applied to graduate, or all students
- **Status**: Select the status of the exception. Either done, not done, ready for review, changed since done, or all
- **Hrs Earned**: Select greater than 100, between 90 and 100, between 60 and 89, or all
- **Degree**: Select either degree awarded or no degree awarded, or all
- **Crse/Excp**: Select exceptions only, courses only, with courses to map, with exceptions, or all
- **UT Term**: Select the desired universal tracking term or all
- **Name**: Enter the name of the student
- **UFID**: If known, enter the UFID of the student and then you can opt to sort the search results by either Name or College Major

RESULTS

Results will display below the filters. The following columns provide helpful links for entering exceptions.

- **Audit (Both)**: Links to both the SASS Audit and the myUFL Degree Audit. Each audit will open in new window
- **UFID (SASS AUDIT)**: The students' UFID number link takes you to the SASS Audit
- **Name (SASS Header)**: The students' name link takes you to the SASS Header information
- **SASS Col-Maj (SASS Course)**: This link takes you to the SASS Courses for that College/Major
- **Audit Counts Crse**: This link takes you to the courses that did not map to our catalog (i.e. transfer courses)
- **Audit Counts Excp**: This link takes you the list of exceptions

NOTE: Once you have completed the exceptions for a student, check the Done check box in that student's row.

Audit	UFID	Name	SASS Col-Maj	Audit Counts		Program Counts			Elig	Hours	Xfer Hrs	CSTAT							Count: 151	
(Both)	(SASS Audit)	(SASS Header)	(SASS Course)	Crse	Excp	Major	Minor	Cert	to Reg	Ernd	Acpt	UT Term	Class	Col	Maj	Trk	Ctlg Yr	Deg	Done ?	Status
Audit	11111111	STUDENT 1	FA--GR	5	2	1	0	0	Y	138.00	60.00	6	4	FA	GRD		2015	BFAGRA	☐	Not done:
Audit	22222222	STUDENT 2	FA--TH BA	0	2	2	0	0	Y	107.00	6.00	6	4	FA	THB	BA	2015	FABA	☐	Not done:
Audit	33333333	STUDENT 3	FA--MS CFI	0	4	1	0	0	Y	160.00	0.00	6	4	FA	MSC	CFI	2015	BMUS	☐	Not done:

FOR ADDITIONAL ASSISTANCE

Technical Issues
The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

GRADUATE DEGREE AUDITS

OVERVIEW

The Graduate School utilizes Degree Audits to monitor **Graduate School Requirements** for overall credits, major credits, relevant GPAs, allowable undergraduate credits and milestones. These requirements are governed by the Graduate Council. In this instruction guide, we will review the Degree Audit, discuss exceptions, and explain how milestones impact the Graduate Degree Audit.

GRADUATE DEGREE AUDIT

Graduate School audits contain 3 main Requirement Groups, which exist for every degree program. These include:

- **Requirement Group 1**: General information on graduate programs
- **Requirement Group 2**: Plan-specific Requirements that vary from plan to plan
- **Requirement Group 3**: Credits, GPAs, and Milestones required for students to graduate with the specified degree

Requirement Groups can expand to view Requirements and Requirement Lines. The Graduate School's Office of Graduate Student Records personnel are authorized to make exceptions on Degree Audits. Currently, all requests for exceptions to Graduate School Council policies require a formal petition process through the Graduate School.

University of Florida | Graduate

This report last generated on 08/02/2018 12:00PM

| Collapse All | Expand All | View Report as PDF | Return to Default |

Completed at UF   IP In Progress   Plann

T2 2-Year Transfer   T4 4-Year Transfer   EX Exam or Test   IN Internal Transfer   TR Other T

Requirement Satisfied   Requirement Satisfied-IP Course   Requirement Not Satisfied

Expand All will open the Requirement Groups into the view below.

▶ Graduate Catalog Link & Course Limits

▶ PhD in Mechanical Engineering: General Information

▼ Graduate School Requirements for the PhD in Mechanical Engineering ❌

Not Satisfied: The following requirements are monitored by the Graduate School.

Bachelor's Degree ✅

Satisfied: A Bachelor's Degree must be on file for this student.

▶ External Bachelor's Degree ✅

Graduate School Credits Requirements - PhD in Mechanical Engineering ❌

Not Satisfied: The following are university-level course requirements for this degree program. The academic unit overseeing this degree program also has its own, more specific requirements necessary for graduation.

▼ Graduate School Overall Credits Required ❌

Not Satisfied: The Graduate School requires at least 90 credits towards this degree with a minimum grade of C or better.

- Units: 90.00 required, 24.00 taken, 66.00 needed
- GPA: 3.000 required, 3.900 actual

The following courses were used to satisfy this requirement:

Personalize | View All | 🔗   First ◀ 1-7 of 7 ▶ Last

Course	Description	Units	When	Grade	Status
CAP6617	Adv Machine Learning	3.00	Fall 2017	A	UF
COP5536	Adv Data Structures	3.00	Fall 2017	A-	UF
EEL6935	Spec Topic Elect Engr	3.00	Spring 2018	A	UF
EGM6936	Graduate Seminar	1.00	Spring 2018	A	UF
EML7979	Advanced Research	3.00	Fall 2017	S	UF
EML7979	Advanced Research	5.00	Spring 2018	S	UF
EML7979	Advanced Research	6.00	Summer 2018		IP

▶ Graduate School Major Credits Required ❌

Graduate School GPA Requirements - PhD in Mechanical Engineering ◉

Arrow to **expand** or **collapse**

Requirement Group

Requirement

Requirement Line

GRADUATE MILESTONES

Milestones are used by the Graduate School to track non-course requirements such as a thesis/dissertation. For the Graduate School, milestones:

- Are automatically applied by the Graduate School for graduate degree plans.
- Are assigned based on the student's academic program.
- Vary depending on the degree being sought.
- Directly impact the Degree Audit and must be satisfied for the degree to be awarded.

- Examples include:
    o Doctor of Philosophy
        ▪ Supervisory Committee
        ▪ Qualifying Examination
        ▪ Admission to Candidacy
        ▪ Final Examination, Dissertation Defense
        ▪ Final term enrollment
    o Master's (Thesis)
        ▪ Supervisory Committee
        ▪ Final Examination, Thesis Defense
        ▪ Final term enrollment
    o Master's (Non-Thesis)
        ▪ Supervisory Committee
        ▪ Final Examination, Final Culminating Experience
        ▪ Final term enrollment

Graduate Advisors enter data for the completion of most milestones. Thesis and Dissertation milestone status levels are assigned by the Graduate School Editorial Office upon submission of the thesis or dissertation and their associated required documents.

VIEWING MILESTONES

Graduate Milestones may be viewed in the Advisee Student Center or the Student Services Center.

Student Services Center Navigation: NavBar > Main Menu > Student Information System > Campus Community > Student Services Center

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

ADDITIONAL HELP

Further resources are available at https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising for the Graduate School, contact Marjorie Roulston at roulstonm@ufl.edu.

ACADEMIC ADVISING: 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) and number of courses.

NAVIGATION

After logging into myUFL, use one of the following navigation paths:

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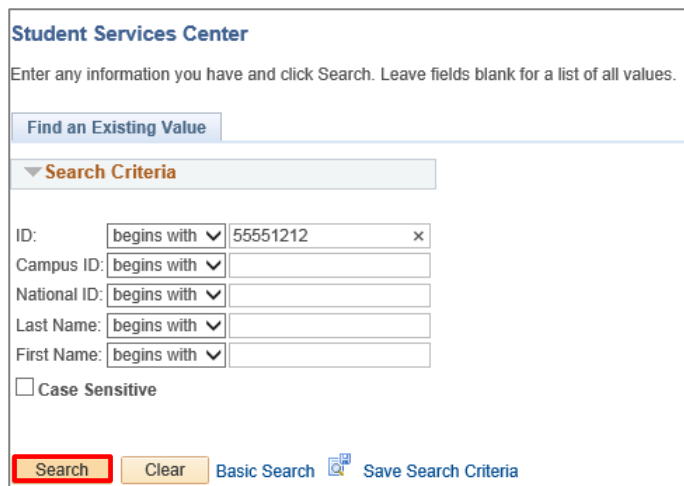
NavBar > Main Menu > Student Information System > Self Service > Advisor Center > Advisee Student Center

Student Services Center:

NavBar > Main Menu > Student Information System > Campus Community > Student Services Center

ENTER A REQUIREMENT CHANGE

1. Search for the student by UFID or first and last name that needs the requirement waiver. Click **Search**.

2. Click on the **student's name** to view their degree audit.

Advisee's Student Center

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

ID: begins with ▼ [   ] 🔍
Campus ID: begins with ▼ [   ]
National ID: begins with ▼ [   ]
Last Name: begins with ▼ ALLIGATOR ✕
First Name: begins with ▼ [   ]

☐ Case Sensitive

[Search] [Clear] Basic Search 🔲 Save Search Criteria

Search Results

View All   First ◀ 1-2 of 2 ▶ Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
55551212	Alligator,Albert	Unknown	**/**/****	(blank)	*********	USA	SSN	ALLIGATOR	ALBERT

3. From the dropdown menu, select **Academic Requirement**. Then, click the **arrow icon**.

Albert Alligator   ID   55551212   ★

Student Center	General Info	Admissions	Transfer Credit	Academics	Finances	Financial Aid

Albert's Student Center

┌──────────────────────────┐
│ Academic Requirements   │
│ Advising Notes   │
│ Assignments   │
│ Course History   │   📅 Deadlines   🔲 URL   ✅ Gradebook
│ Exam Schedule   │
│ Grades   │   **This Week's Schedule**
│ Transcript: View Unofficial│
│ Transfer Credit: Report │
│ What-if Report   │
│ other academic...   │ ⟫
└──────────────────────────┘

	Class	Schedule	Units
📘	CHM 2211L-7056 LAB (10904) Regular Academic Session	Mo 11:00AM - 3:15PM Joseph Hernandez Hal 210 We 11:00AM - 1:45PM Joseph Hernandez Hal 210	2.00

4. The Degree Audit loads. Select **Collapse All**.

5. Scroll down and select the **Requirement Group**.

6. Select the **Requirement Line**.

7. Review **Units**.

8. Select **Create Exception drop-down menu**.

9. Select **Requirement Change**.

10. Click **arrow**.

11. Enter **Long Description**.

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Human Resources   Page 4 of 6
University of Florida, Gainesville, FL 32611

12. Enter **Minimum Units**.

13. Select **Save and Return**.

14. Return to the Degree Audit. Review **Units** and make sure **Requirement Change** is correct.

ADDITIONAL HELP

Further resources are available at https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising, contact Tobin Shorey, tshorey@ufl.edu.

<img logos: UF Training & Organizational Development; UF myUFL — Student Information System>

ACADEMIC ADVISING: REQUIREMENT OVERRIDE

- A Requirement Override is used to change a Requirement 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.

NAVIGATION

After logging into myUFL, use one of the following navigation paths:

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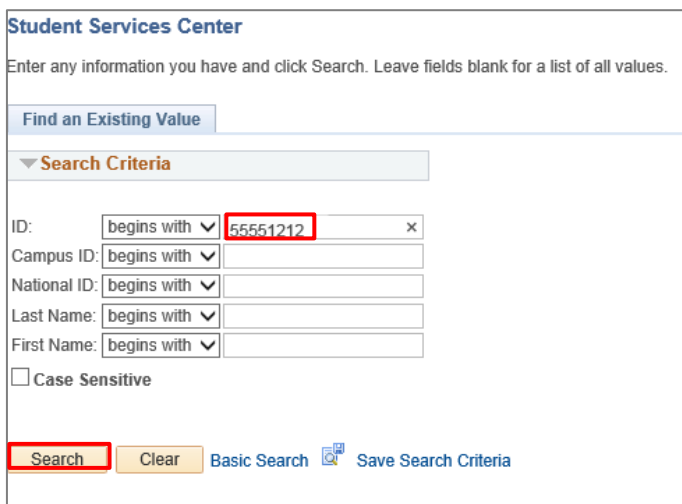
NavBar > Main Menu > Student Information System > Self Service > Advisor Center > Advisee Student Center

Student Services Center:

NavBar > Main Menu > Student Information System > Campus Community > Student Services Center

ENTER A REQUIREMENT OVERRIDE

1. Search for the student by UFID or first and last name that needs the requirement waiver. Click **Search**.

2. Click on the **student's name** to view their degree audit.

3. From the dropdown menu, select **Academic Requirement**. Then, click the **arrow icon**.

4. The degree audit loads. Scroll down and select the **Requirement Group**.

> ▶ Public Relations Major Catalog Link for Catalog Year 2017
>
> ▶ Public Relations - Critical Tracking ⊙
>
> ▶ Public Relations - College Requirements ⊗
>
> ▶ **Public Relations - Core Requirements** ⊗

5. Select the **Create Exception drop-down menu** from the Outside Concentration Requirement.

> ▶ (25)-Public Relations Professional Electives (Block 1: 10 Credits) ⊗
>
> ▶ (26)-Public Relations Professional Electives (Block 2: 3 Credits) ⊗
>
> Outside Concentration ⊗
>
> [create exception ▼] ⟫
>
> Not Satisfied: Specify Outside Concentration in Room 1060 Weimer.
> Courses cannot be used to meet other requirements. Outside concentrations require
> 12 credits in a department outside of the college unless otherwise noted.

6. Select **Requirement Override**.
7. Click the **arrow**.

> ▶ (26)-Public Relations Professional Electives (Block 2: 3 Credits) ⊗
>
> Outside Concentration ⊗
>
> [Requirement Ov ▼] [⟫]
>
> Not Satisfied: Specify Outside Concentration in Room 1060 Weimer.
> Courses cannot be used to meet other requirements. Outside concentrations require
> 12 credits in a department outside of the college unless otherwise noted.

8. Enter a **Long Description**.

> **Description**
>
> Advisement Override: 000000000 🗑
>
> Long Description: TJS

9. Select the **magnifying glass** beside Requirement to search.

New Values

Requirement Group

Requirement [🔍]

Save and Return   Cancel

10. Enter **Description**. In this example, we will enter **JM-MIN**.

11. Select **Look Up**.

Description

Advisement Override: 000000000

Long Description: TJS

Look Up Requirement   ✕

Academic Institution: UFLOR
Academic Requirement: [begins with ▾] [   ]
Academic Career: [begins with ▾] [   ]
Academic Program: [begins with ▾] [   ]
Academic Plan: [begins with ▾] [   ]
Academic Sub-Plan: [begins with ▾] [   ]
Description: [begins with ▾] [JM-MIN   ✕]

Requirement to Override

Requirement Group: 503721   PR C
Requirement: 000503874   Outsi

New Values

Requirement Group [   ]

Requirement [🔍]

[**Look Up**]   Clear   Cancel   Basic Lookup

Save and Return   Cancel

12. Click on the **Academic Requirement**.

000503577	UGRD	(blank)	(blank)	(blank)	JM-MINBU2
000503422	UGRD	(blank)	(blank)	(blank)	JM-MINBUS
000503567	UGRD	(blank)	(blank)	(blank)	JM-MINCCJ
000505174	UGRD	(blank)	(blank)	(blank)	JM-MINCHM
000503914	UGRD	(blank)	(blank)	(blank)	JM-MINCIS

13. Select **Save and Return**.

14. Return to the audit to make sure the override appears, and the new Requirement appears.

▶ **(26)-Public Relations Professional Electives (Block 2: 3 Credits)**   ✕

Criminology Concentration   ✕

                                                    [*Req Override ▾] ⏩

Not Satisfied:

▶ **(27)-Minimum 12 hours required (limit of 3 hours below 3000 level)**   ✕

▶ **(28)-9 hours must be 3000 level or higher (unless pre-requirement)**   ✕

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	Development
	Human Resources
	UNIVERSITY *of* **FLORIDA**

UF | **myUFL**

Student Information System

ADDITIONAL HELP

Further resources are available at https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/.

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For assistance with processes or policies related to Academic Advising, contact Tobin Shorey, tshorey@ufl.edu.

ACADEMIC ADVISING: REQUIREMENT WAIVER

- Used to waive a Requirement or Requirement Line.
- Drops all courses already in the area out and cause the area to not be checked when the Degree Audit runs.
- 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.
- Common use includes waiving non-course requirements or GPA requirements.

NAVIGATION

After logging into myUFL, use one of the following navigation paths:

Advisee Student Center:

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

Student Services Center:

NavBar > Main Menu > Student Information System > Campus Community > Student Services Center

ENTER A REQUIREMENT WAIVER

1. Search for the student by UFID or first and last name that needs the Requirement Waiver. Click **Search**.

Student Services Center

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

ID: begins with ▾ 55551212 ✕
Campus ID: begins with ▾
National ID: begins with ▾
Last Name: begins with ▾
First Name: begins with ▾
☐ Case Sensitive

[Search] [Clear] Basic Search 🔲 Save Search Criteria

2. Click on the **student's name** to view their degree audit.

3. From the dropdown menu, select **Academic Requirement**. Then, click the arrow icon.

4. The Degree Audit loads. You may need to click on the **Requirement Group** and **Requirement Line** to expand the view and locate the course you want to waive.

    Note: If the audit is already in the "expanded view," you can just scroll down to the course.

5. Select the **Create Exception drop-down menu** and select **Requirement Waiver** for the course you want to waive.

6. Click the **arrow**.

7. Enter **Long Description**.

8. Select **Save and Return**.

9. Return to the Degree Audit to make sure the waiver appears.

ADDITIONAL HELP

Further resources are available at https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising, contact Tobin Shorey tshorey@ufl.edu.

TEST CREDIT

- Gives a student course credit for a previously completed test
- Test credit is limited to 45 credits

NAVIGATION

Log into myUFL, then go to:

1. Click **Main Menu**
2. Click **Student Information System**
3. Click **Records and Enrollment**
4. Click **Transfer Credit Evaluation**
5. Click **Adjust Transfer & Test Credits**

TEST CREDIT

1. Search for the student's degree audit either by UFID or first and last name. Then, click **Search**.

Adjust Transfer Test Credit

2. Click on the search results to display the student's information.
3. Click the **Test Credit** tab.

4. Enter "**N**" for each course that will not count for credit.

- Up to 45 credits can be used for course credit.
- If possible, select credits that can't be used in the student's degree program.

6. Reduce credits until the amount of test credit is at 45 credits (maximum). Then, click **Save**.

- Note that the units transferred will update when you click Save.

ADDITIONAL HELP

Further resources are available at http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising, contact the Toby Shorey, tshorey@ufl.edu.

TRANSFER CREDIT

- Gives a student course credit for a previously completed course
- Transfer credit is limited to 60 credits from two year institutions

NAVIGATION

Log into myUFL, then go to:

1. Click **Main Menu**
2. Click **Student Information System**
3. Click **Records and Enrollment**
4. Click **Transfer Credit Evaluation**
5. Click **Adjust Transfer & Test Credits**

TRANSFER CREDIT

1. Search for the student's degree audit either by UFID or first and last name. Then, click **Search**.

Adjust Transfer Test Credit Screen

Adjust Transfer Test Credits

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: ID ▼ begins with _____

Search   Advanced Search

2. Click on the search results to display the student's information.
3. Click the **Course Credit** tab.
4. Enter "N" for each course that will not count for credit.
    - Up to 60 credits can be used for course credit.
    - If possible, select credits that can't be used in the student's degree program.
    - Reduce credits until the amount of test credit is at 60 credits (maximum).

Course Details Find | View All   First 1 of 1

Institution: University of Florida	Career: Undergraduate	
Program: Business	Plan: Bus Admin-General Studies	Sub-Plan:

Personalize | Find | View All | 📷 | 📊   First 1-26 of 26 Last

Mdl	Grp	Seq	Ext Institution	Ext Term & Year	Ext Subj & Crse Nbr	Ext Title	Ext Units	Ext Grade	Artic Term & Year	Subj & Crse Nbr	Title	Units	Grade	Excl Code
1	1	1	1 Florida State Colg @ Jackson	Fall 2013	MAC 1114	COLLEGE TRIGONOMETRY	3.00 A		Fall 2016	MAC 1114	Trigonometry	3.00 A		
2	1	2	1 Florida State Colg @ Jackson	Fall 2014	MAC 2311	CALC ANALYTIC GEOM I	4.00 C		Fall 2016	MAC 2311	Analyt Geom and Calc 1	4.00 C		
3	1	3	1 Florida State Colg @ Jackson	Fall 2014	BSC 2010C	PRINC OF BIOLOGY I	4.00 B		Fall 2016	BSC 2010	Integra Princ Biol 1	4.00 B		
4	1	3	2 Florida State Colg @ Jackson	0				B	Fall 2016	MCB 3023L	Microbiology Lab	1.00 B		
5	1	4	1 Florida State Colg @ Jackson	Fall 2014	ARH 2050	ART HISTORY I	3.00 A		Fall 2016	ARH 2050	Intro Hist of Art 1	3.00 A		
6	1	5	1 Florida State Colg @ Jackson	Summer 2014	HUM 2210	HUMANITIES: FNDTNS	3.00 B		Fall 2016	HUM 2210	Western Humanities	3.00 B		
7	1	6	1 Florida State Colg @ Jackson	Summer 2013	CHM 1032C	PRINC GEN CHEMISTRY	4.00 B		Fall 2016	CHM 1031	Bas Chem Concept/Appl	4.00 B		
8	1	7	1 Florida State Colg @ Jackson	Summer 2013	ENC 1101	ENGLISH COMPOSTN I	3.00 B		Fall 2016	ENC 1101	Expos and Argu Writing	3.00 B		
9	1	8	1 Florida State Colg @ Jackson	Fall 2013	AMH 2010	US HIS TO 1865	3.00 B		Fall 2016	AMH 2010	United States to 1877	3.00 B		
10	1	9	1 Florida State Colg @ Jackson	Fall 2014	SPC 2017	INT SPEECH COMMUNCTN	3.00 B		Fall 2016	SPC L000	Transfer SPC Course	3.00 B		
11	1	10	1 Florida State Colg @ Jackson	Spring 2014	AMH 2020	US HIS TO PRES	3.00 A		Fall 2016	AMH 2020	Us Since 1877	3.00 A		
12	1	11	1 Florida State Colg @ Jackson	Spring 2014	DEP 2004	HUMAN GROWTH/DVLPMNT	3.00 A		Fall 2016	DEP 2004	Developmnt Psychology	3.00 A		
13	1	12	1 Florida State Colg @ Jackson	Spring 2014	ENC 1102	WRITING NON-FICTION	3.00 A		Fall 2016	ENC 1102	Argumnt and Persuasion	3.00 A		
14	1	13	1 Florida State Colg @ Jackson	Summer 2014	GEA 1000	WORLD GEOGRAPHY	3.00 B		Fall 2016	GEA 1000	Geog Changing World	3.00 B		
15	1	14	1 Florida State Colg @ Jackson	Spring 2015	SYG 2010	SOCIAL PROBLEMS	3.00 B		Fall 2016	SYG 2010	Social Problems	3.00 B		
16	1	15	1 Florida State Colg @ Jackson	Spring 2015	STA 2023	ELEMT STATISTICS	3.00 B		Fall 2016	STA 2023	Intro to Statistics 1	3.00 B		
17	1	16	1 Florida State Colg @ Jackson	Spring 2015	HSC 1531	MEDICAL TERMINOLOGY	3.00 A		Fall 2016	HSC 3537	Hlth and Med Terminolgy	3.00 A		
18	1	17	1 Florida State Colg @ Jackson	Spring 2015	HUN 1201	HUMAN NUTRITION	3.00 C		Fall 2016	HUN 2201	Fund Human Nutrition	3.00 C		
19	1	18	1 Florida State Colg @ Jackson	Spring 2015	SLS 1103	STRATEGIES/SUCCESS	3.00 A		Fall 2016	SLS L000	Transfer SLS Course	3.00 A		
20	2	19	1 Santa Fe College Florida	Summer 2016	ECO 2023	MICROECONOMICS	3.00 A		Fall 2016	ECO 2023	Prin Microeconomics	3.00 A		
21	2	20	1 Santa Fe College Florida	Summer 2016	ACG 2071	MANAG ACCT	3.00 A		Fall 2016	ACG 2071	Intro Managerial Acct	3.00 A		
22	2	21	1 Santa Fe College Florida	Spring 2016	MAC 2233L MAC 223	SURV CALC LAB	A		Fall 2016	MAC 2233	Survey of Calculus 1	0.00 A		
23	2	22	1 Santa Fe College Florida	Spring 2016	MAC 2233	SURVEY CALCULUS MAC 223	4.00 A		Fall 2016	MAC 2233	Survey of Calculus 1	4.00 A		
24	2	23	1 Santa Fe College Florida	Spring 2016	ECO 2013	MACROECONOMICS ECO 201	3.00 B+		Fall 2016	ECO 2013	Prin Macroeconomics	3.00 B+		
25	2	24	1 Santa Fe College Florida	Spring 2016	CGS 1000	INT COLL COMPUTERS CGS 100	3.00 A		Fall 2016	CGS L000	Transfer CGS Course	3.00 A		

5. Click **Save**. Note that the units transferred total will update when you click Save.

ADDITIONAL HELP

Further resources are available at http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Academic Advising, contact the Toby Shorey, tshorey@ufl.edu.

ACADEMIC ADVISING: UPDATE ADVISING NOTE

ADVISING NOTES

- Advisor 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.

NAVIGATION

After logging into myUFL, use the following navigation path to reach the Advisee Student Center:

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

UPDATE ADVISOR NOTE

1. From the Advisee Student Center, search for the student's degree audit using their UFID or first and last name. Click **search**.

2. Click on the name of the student to reach their degree audit.

Advisee's Student Center

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

ID: begins with ▼ [   ] 🔍
Campus ID: begins with ▼ [   ]
National ID: begins with ▼ [   ]
Last Name: begins with ▼ [   ]
First Name: begins with ▼ [   ]

☐ Case Sensitive

[Search] [Clear] Basic Search 🔲 Save Search Criteria

Search Results

View All   First ◄ 1-2 of 2 ► Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
00000542	Alligator,Albert	Unknown	**/**/****	(blank)	*********	USA	SSN	ALLIGATOR	ALBERT
02062630	Alligator,Alberta B	Female	**/**/****	(blank)	*********	USA	SSN	ALLIGATOR	ALBERTA

3. From the dropdown menu, select **Advising Notes**.

Faculty Center	Advisor Center	Search	Learning Management

My Advisees | **Student Center** | General Info | Transfer Credit | Academics

Advisee Student Center

Alberta Alligator

▼ **Academics**

My Class Schedule
Shopping Cart
My Planner

ⓘ You are not enrolled in classes.

[other academic... ▼] ⟫

Academic Requirements
Advising Notes
Assignments
Course History
Exam Schedule
Grades
Transcript: View Unofficial

Contact Information

Permanent Address   Billing Address
None   None

Primary Phone   Home E-mail
352/111-1111   None

4. After reaching the student's degree audit, **scroll down** on the audit to the note section of the degree audit.
    - Advisors can comment on notes that already exist.
    - These subnotes will follow under the original note like a message thread.
    - The subnote inherits the Category, Subcategory, and Subject from the Note you are updating.

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UF | myUFL

Student Information System

5. Click the **note field**, and enter your comment.

6. Click **Add Comment**.

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Student Information System

7. Click **Display to Student** if you would like the note to display in OneUF.

< **Degree Progress Report**   **Advising Notes**

Note ID 00003   Subject CONVNOTES / GENERAL   ☐ Display to Student
Category CONVNOTES   Created 07/01/2016   ☑ Open Note
Subcategory GENERAL   Advisor

▼ Comments   1 of 1
Going for graphic design. FALL: WARP, DIG1000c, and IUF1000. - DXM

Seq 1   Created 07/01/2016 By UF_CONVERSION
Nbr

Add Comment

Add New Note

*Category MAJORCNG 🔍   *Subject Change from ADV to JM
*Subcategory SAMECOLLEG🔍   ☐ Display to Student
Comments
Student indicated a desire to change major from Advertising to Journalism. Processing major change in Student Program/Plan effective immediately.

Contact the Director of Curriculum Analysis to update or remove committed notes.   Save Note

🔍 Return to Search   ⟳ Refresh

8.   Click **Save Note**.

< **Degree Progress Report**   **Advising Notes**

Add Comment

Note ID 00003   Subject CONVNOTES / GENERAL   ☐ Display to Student
Category CONVNOTES   Created 07/01/2016   ☑ Open Note
Subcategory GENERAL   Advisor

▼ Comments   1 of 1
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Add Comment

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