

# STUDENT PROFILE

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## REVISION HISTORY

Version	Date	Name	Description

## INTRODUCTION AND PURPOSE

This document is intended to orient you to the Student Profile and the advising notes within the profile.

## RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. The Student Profile is intended to be a resource for advisors by pulling together various data points on the student's academic record and providing it in one location for viewing.
2. Access to the Student Profile is to Academic Advisors, Faculty Advisors and other administrative staff who are deemed appropriate and necessary in viewing the advising notes.
3. Advising notes include all notes retained by the academic advisors that is not directly related to the student's degree audit and requirements for graduation.
  - a. Degree Audit and requirement notes are within Degree Works
  - b. All other administrative notes are within SPACMNT in Banner
4. Notes cannot be deleted or modified after saved.
5. **Notes should be factual without subjective personal opinions.** The student has rights under FERPA to review all notes.

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Registrar's Office
2. Academic Departments
3. College Offices
4. Other staff identified as needed

## BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Student Profile Training ([advisorssbsb.ucr.edu](http://advisorssbsb.ucr.edu)) to follow along.

## FORMS

There are no forms in the Student Profile

Form	Form Name	Description

## PROCEDURES

All aspects of the student profile are for viewing only except for the notes. You can see if the student has holds, their current registration information to include time tickets, access to their degree audit, their unofficial transcript and more.

### ACCESSING THE STUDENT PROFILES

#### STEPS

1. The Advisee Search provides several options for locating a student's profile. There is a Getting Started tab on the right with some helpful tips.
2. Select **Term** – this will impact the students that show on your advisee list because that can change per term.
  - a. Search for any student, including those that you are not currently assigned to as an advisor.
    - i. Use the radio button to select how you want to search for the student
    - ii. Type in the corresponding information into the field. The system should automatically begin displaying potential results. For name ensure you type Last name, First Name.
    - iii. Once you have found the student you are looking for. Click View Profile

**Advisee Search**

Change term, search for a student, or view your advisee listing

Term  
Spring 2016

View advisee listing, or search by

Student ID

Student Email

Student Name

Student Name  
Dailey, Sydney

Dailey, Sydney

[View Profile](#) [View My Advisee Listing](#)

- b. View your Advisee Listing
  - i. Select the View My Advisee Listing link

**Advisee Search**

Change term, search for a student, or view your advisee listing

Term  
Spring 2016

View advisee listing, or search by


Student ID  
 Student Email  
 Student Name

Student Name  
Dailey, Sydney

Dailey, Sydney

[View Profile](#) [View My Advisee Listing](#)

- ii. Once your advisee list appears you can click on the student’s name to bring up that student’s profile page.

	<a href="#">Dailey, Sydney</a> <a href="#">A00010567</a> <a href="#">View Profile</a>	BS in Biology	Biology
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## ADVISEE LISTING

### STEPS

Your advisee list provides you a list, for the term selected, of all students who have you listed in Banner as an advisor. You do not have to be listed as their primary advisor for them to show on your list. There is a Getting Started tab on the right with some helpful tips.

The columns can be sorted alphabetically by clicking on the arrows in the column header.

Spring 2016						
Name and ID	Program	Primary Major	Concentration	Student Status	Academic Standing	

The form does also have a filter option that can allow you select criteria to narrow down your list of students. You can add column criteria and the select Go to perform the filter.

**Advisee Listing**

Spring 2016 Email All [Filter](#)

Filter Records

Last Name  Equals

Add Another Column

[Cancel](#) [Clear All](#) [Go](#)

Name and ID	Program	Primary Major	Concentration	Student Status	Academic Standing	Primary Advisor	Advisor Type	College	Minor	Student Type
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## STUDENT PROFILE OVERVIEW

The Student Profile is intended to be the main hub for advisors to review a student’s academic record. From this profile you can access a large variety of student record information. The profile is term based so ensure you select the appropriate term during your advisee search.

### Top Bar

In the top bar you can quickly determine the student’s academic standing for the term, overall earned hours, cumulative GPA, current holds and if the student is eligible for registration or not.

### Right Body of Profile

This area will show the student’s current curriculum, overview of their hours and GPA and if they are currently enrolled for the term.

### Left Navigation Bar

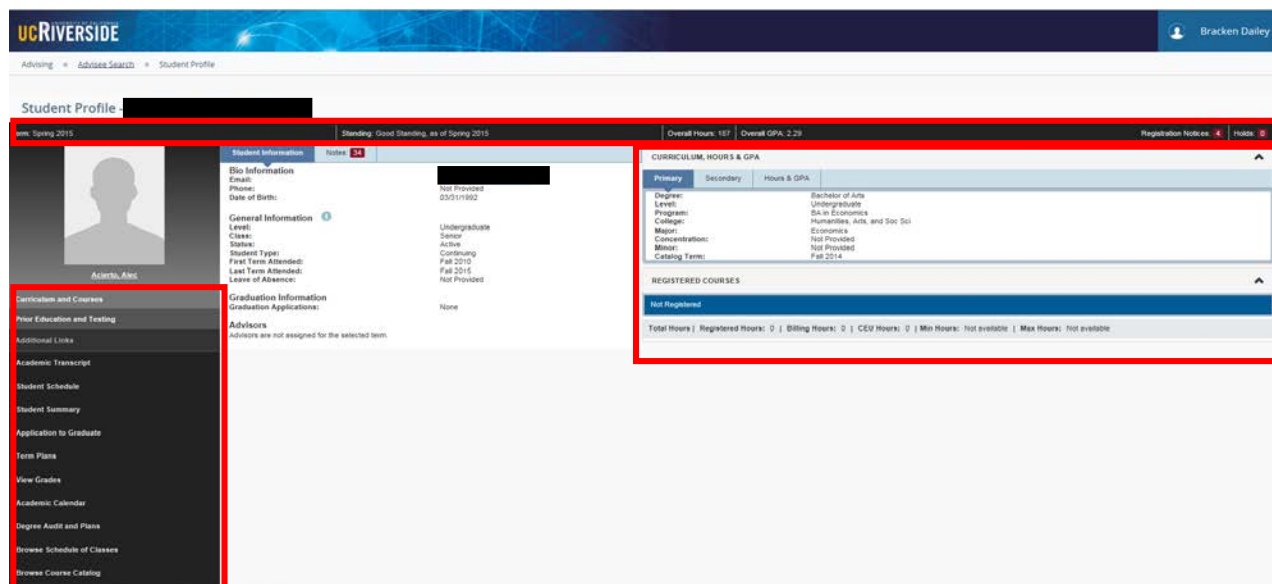
These links take you to various data sources that are outside of the Student Profile. The links open up in new web browser tabs so that you can easily return to the Student Profile. A few you want to pay close attention to are:

*Degree Audit and Plans* - this is your access to the student’s degree audit and 4-year course plans.

*View Grades* – provides you a comprehensive list of the student’s graded courses. The columns are sortable so this allows you to view the student’s grades in alphabetical order by course subject.

*Term Plans* – provides you access to review and approve term plans for registration.

*Academic Transcript* – this is access to an unofficial/advising transcript. Students do not have access to an unofficial transcript.



*\*If you were a previous student at UCR and now a staff member – when the left navigation links for Academic Transcript, Student Schedule, Student Summary and Application to Graduate take you to self-service the displayed page is for the student you are reviewing. Please note however, that if you click on any of the navigation tabs once there that will bring you to your student self-service information. Not the student you are reviewing.*



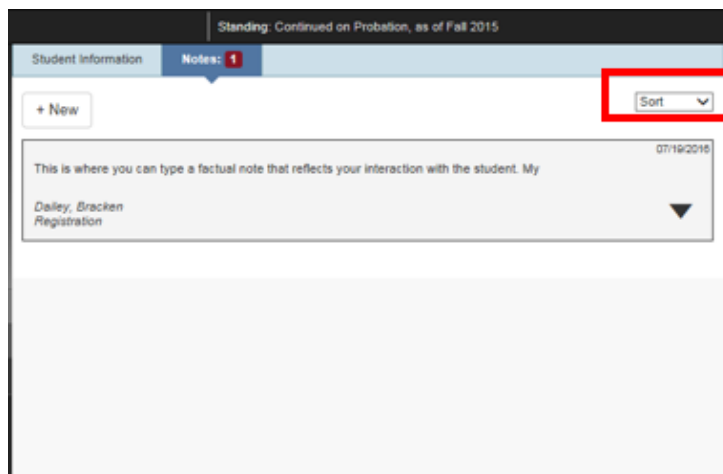
Currently student photos will not be present in the Student Profile. This is a future enhancement we are looking to provide.

## STUDENT PROFILE NOTES

### STEPS

Notes in the Student Profile are to be advising notes only. If a student has previous notes on file you will see a number greater than 0 in the red box next to the Notes header.

You can sort the notes by Date, Author or Category by using the Sort drop down



To add a note

1. Click on the Notes tab
2. Select New
3. Type note in box – Do remember that these notes should be factual without subjective personal opinions. The student has rights under FERPA to review all notes.
4. Select Category – the category selection can assist in sorting of notes and reporting. General categories are listed to group many items together. Select Other if no category applies.
  - a. Notes that were converted from SIS are classified under the Other category with an advisor of Convert, Advisor Notes

10/21/2013

GENERAL COMMENT:

*Convert, Advisor Notes*  
*Other*

▼

5. Select Contact Type
6. Always leave Viewable by Advisor checked
7. Click on Post Note

Standing: Continued on Probation, as of Fall 2015

Student Information **Notes: 0**

+ New Sort ▼

This is where you can type a factual note that reflects your interaction with the student. My student asked me about how she will register for fall quarter as a returning student.

Registration ▼ \*

Contact Type ▼

Viewable By:  
 Advisor

Cancel Post Note

There have not been any notes added for this student.

Once you have saved the note you will see that it reflects in the number count and you can now see the note with your name associated with it.

Standing: Continued on Probation, as of Fall 2015

Student Information **Notes: 1**

+ New Sort ▼

This is where you can type a factual note that reflects your interaction with the student. My 07/19/2015

*Daley, Bracken*  
*Registration* ▼