Business Process Guide – Advisor Tracking Tool

Purpose

This document was created to walk through the various tasks in the Advisor Tracking Tool available in PeopleSoft. The Advisor Tracking Tool provides a way for advisors to view a student's progress towards meeting the degree requirements of their current major. Critical requirements are indicated in terms 1-4; necessary requirements are indicated in terms 5-8. Advisors can see the requirements, how the student is meeting them (or not meeting them) and the corresponding tracking status. Critical and necessary requirements are also documented in each plan's major map. Students with catalog years of 2007-2008 through 2012-2013 are tracked through terms 1-4. Beginning August 15, 2013 , students with a catalog year of 2013-2014 and higher will be tracked through terms 1-8.

Contents

Accessing the Advisor Tracking Tool

The Advisor Tracking Tool is part of the PeopleSoft student system accessed via https://cs.oasis.asu.edu.
Navigation*:* ASU Customizations> ASU Student Records> ASU Advising> Advisor Tracking Tool.
Tip: You can add this page to your PeopleSoft favorites using the "Add to Favorites" link in the upper right.

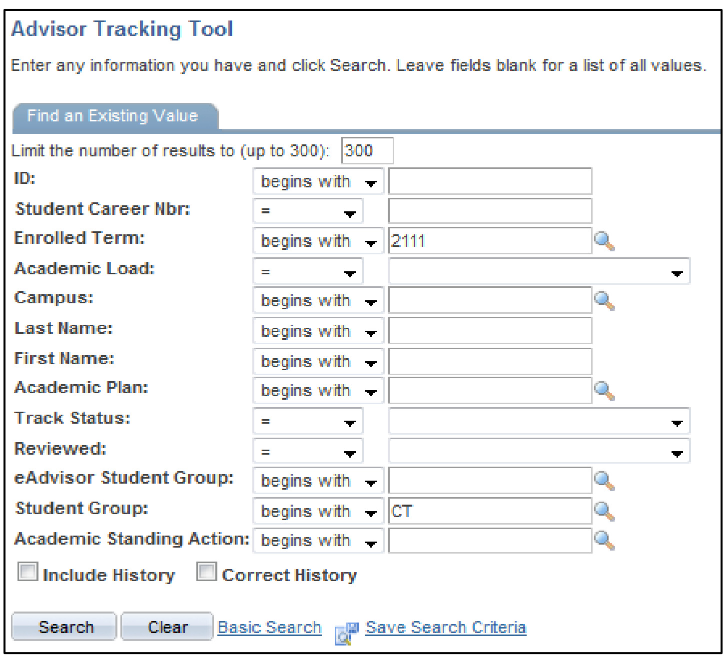
Prerequisites

You will need to be granted access to PeopleSoft and be given a User ID and Password. Contact your advising director if you do not have this information. You will also need to complete the following:

1. Attended the Blackboard courses below and pass the test included in the courses. Use these links to self-enroll.
   - FERPA refresher
   - Advising 101: View Student Data
   - Advising 201: Using ASU Advising and Setting Service Indicators
2. You will need access to the PeopleSoft roles listed below. Some or all of these may need to be requested in addition the initial PeopleSoft setup. These can be requested via https://www.asu.edu/go/oasis/AddSecurityRequest
   - SR Standard Student Pages
   - SR Catalog Schedule View
   - ASU Enrollment Advising Update

Searching for students

The initial search screen can be used to find a particular students or group of students that you would like to review.
Tip: The comparator option (default is "begins with") can be changed to further control the results from your search.



ID – Empl ID of a particular student(s).
Student Career Nbr – Each active major of a student will have a career number.
Enrolled Term – (*required) This defaults to the current term. The term works in conjunction with the field below however, if the field below is left blank, this is the term in which a student has been term-activated.
Academic Load –

- ¾ Time = 9-11 hours
- Full-time = 12 or more hours
- Half-time = 6-8 hours
- Less ½ = less than 6 hours
- Part-time = includes all but "Not enrolled" and "Full-time"

Campus – campus of the student(s), not their plan(s)
Last Name – Last name of student(s)
First Name – First name of student(s)
Academic Plan – Student(s) major that is currently being tracked
Track Status – Current track status of student(s). A student with concurrent majors may have varying track statuses.
Reviewed – Flag set on the Status tab by an advisor for the tracking status/progress of each major for a student.
eAdvisor® Student Group – used to limit by a specific CT student group (If you are not filtering for a subset of students in a particular CT group, leave this field blank.)

Student Group – Can be any student group you are interested in.
Academic Standing Action – Use the magnifying lens icon to show the list of currently available values.

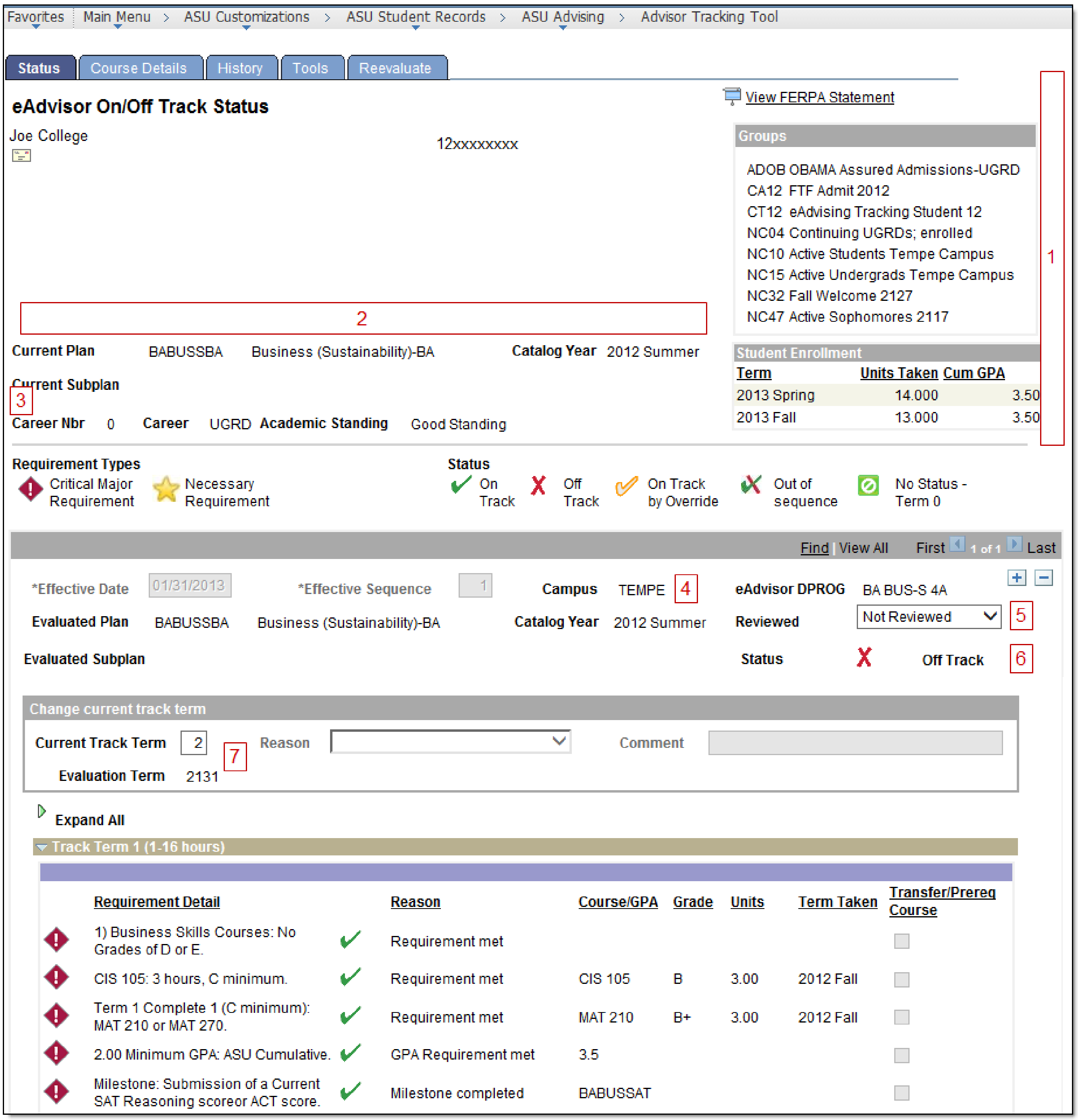
Status tab

A student's status tab is populated when a student has been evaluated. This occurs via a nightly process based on:

- Change of major
- Change to track term
- Changes to enrollment (add/drop class)
- Transfer coursework has been posted
- Grade has been posted or changed
- Milestone is marked as completed

NOTE: If a student is evaluated more than once on the same day, the effective sequence will increment by 1.

NOTE: Highlighted requirements work with the Reviewed field. A highlighted requirement is used to display information that has changed since the last time a row was marked as reviewed. Changes that may trigger this include: courses, grades, milestones, term-taken, and evaluated plan.



The student's status tab displays the requirements included for their current plan/major map and displays their progress. Below are some relevant data elements to review:

1. **Student's FERPA flag, student groups and enrollment hours** – The enrollment includes the current term, the most recent past term and next future term hours (if registered). It will not include units for classes where the student dropped the class or received a W grade.
2. **Current Plan & Catalog Year** – compare to Evaluated Plan & Catalog Year fields also noted on this screen. If these do not match, try to reevaluate the student.
3. **Career Nbr** – Each plan for a particular student has a separate career number.
4. **Campus** – The campus of the Evaluated Plan
5. **Reviewed** – Used to designate that an advisor has reviewed this record. Must be manually changed and the record saved. This flag will reset if the student's track status goes from On Track to Off Track.
6. **Status** – Current track status for the evaluated plan. Values are On Track, Off Track, On Track by Override, and No Status- term 0
7. **Current track term & Evaluation term** – Track term values 1 through 8 and evaluation term states what semester this applies. TIP: the track terms are cumulative. If a student is in track term 2, they are being assessed against track term 2 and track term 1 critical requirements.

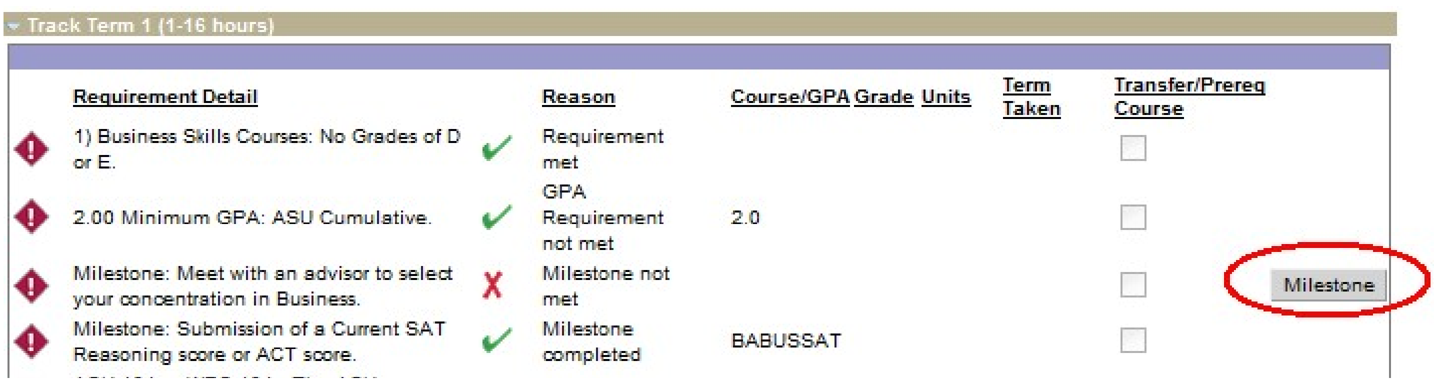
Using "Include History" function

On the bottom of the Status tab, you can view the Last Update Date/Time and Last Update User ID fields. If the User ID field states "ASU CRITICAL TRACKING", the student's record was updated by an eAdvisor® process.

If you need to review previous rows of data to compare with the most recent row of data you will need to use the Include History button on either the Status tab or from the search page. This option will display all rows for a particular student for a particular plan. This may take a while to refresh or fail if the amount of data is very large. When you have multiple rows displayed to reviewed, you can use the left/right arrows in the navigation bar to review each time the student was evaluated and see how the student's progress and/or major has changed over time.

Marking a Milestone Completed

Some major maps have milestones. If the milestone is marked as critical, it must be completed for the student to obtain an overall "on track: status. On the Status tab, an uncompleted milestone will have a Milestone button next to it.



Click the button and a confirmation message will display. Click OK and you should see a "Milestone Added Successfully" message. You do not need to add a new effective-dated row to complete milestones. The milestone will not appear complete on the Status tab until the student has been re-evaluated which typically occur overnight for students who have changes to their data. Once the evaluation completes, the name of the milestone (e.g. BABUSSAT in the screenshot above) will now display with a green check.

If you attempt to add a milestone that has been added, you will receive a message stating that it has already been entered.

Set On Track by Override Status

Next to each requirement displayed on the Status tab, there is a corresponding **Transfer/Prereq Course** checkbox. This box should be checked for situations such as the following:

- Student has pending transfer coursework for a critical requirement
- Student is enrolled in a pre-requisite for a critical requirement

Checking this option will exclude this requirement when a student is evaluated. If the student does not have any other critical requirements that are unmet, the student's overall track status will display as "On Track by Override" which will also prevent the student from receiving an eAdvisor® hold. This setting for the requirement will remain checked until the track term is advanced which takes place approximately 2 weeks after final grades are due. Once the track term has been advanced, the checked box will reset and be part of a student's evaluation.

Change Student's Track Term

A student's track term for a specific plan may be changed if the critical requirements in which the student should be assessed for the current term should change. Since the evaluation of a student's plan will assess not only the current track term but also the previous track term(s), the advisor may manually change the student's track term for particular situations.

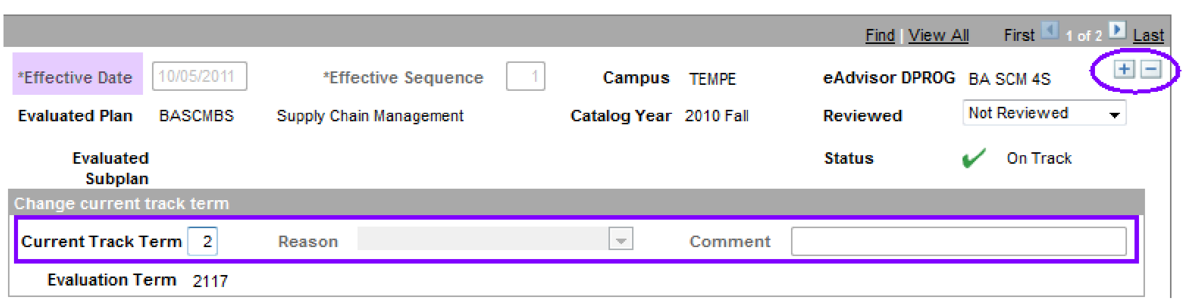
The track term should typically be **set back** to a lower track term when the student is missing one or more critical requirements that will prevent the student getting on track during the current term.

The track term should typically be **set to 0** when the student changes their major mid-semester and has not completed or enrolled in multiple critical courses for the new major.

The track term may also be **set forward** if a student is ahead on the progress of their critical requirements and should be assessed against a greater track term. The track term should not be moved forward if the student will now be considered off track.

To change the track term, a new row should be added on the Status tab.

1. Click the "+" icon. A new row will display and the current date will populate the Effective Date field.
2. Change the Current Track Term value as needed based on the reasons listed above. Use the tab key to activate the Reason field.
3. Select the appropriate reason.
4. The Comment field is required if the reason is either 1) Completing PreReq Course, 2) Course Not Offered or 3) Course(s) Full.
5. Enter the course subject and number in the Comment field.
6. Click Save and a new row has been added.

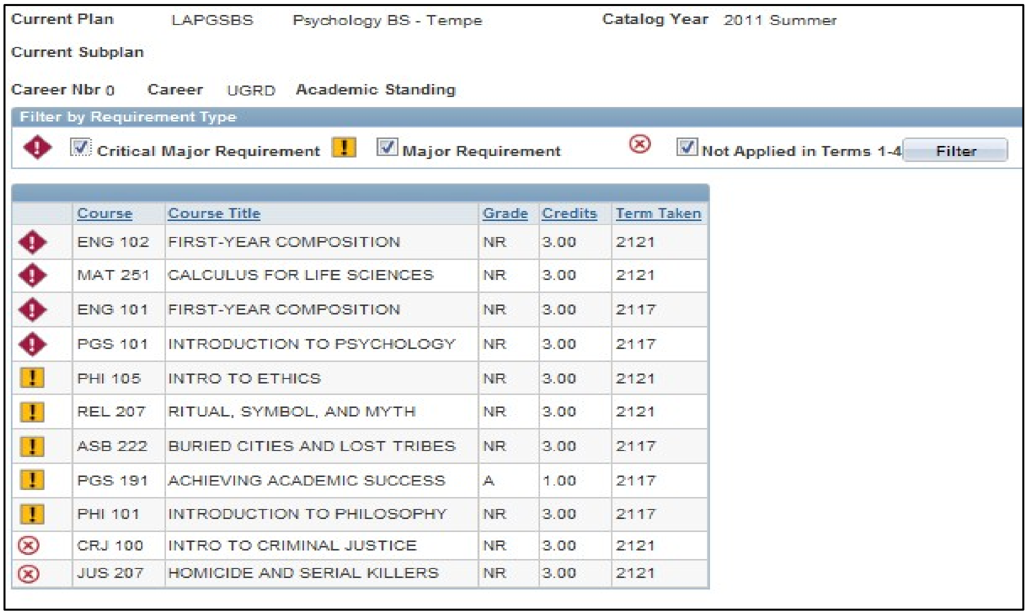


Course Details tab

The Course Details tab displays all courses in which the student has taken, enrolled in a future term, and/or transferred credit with the exception of courses that were dropped. If a grade has posted, that will display also, including W grades.

The list can be filtered by using the checkboxes at the top of the list. Check or uncheck any of the boxes, as needed and then click the Filter button is change the list that displays.

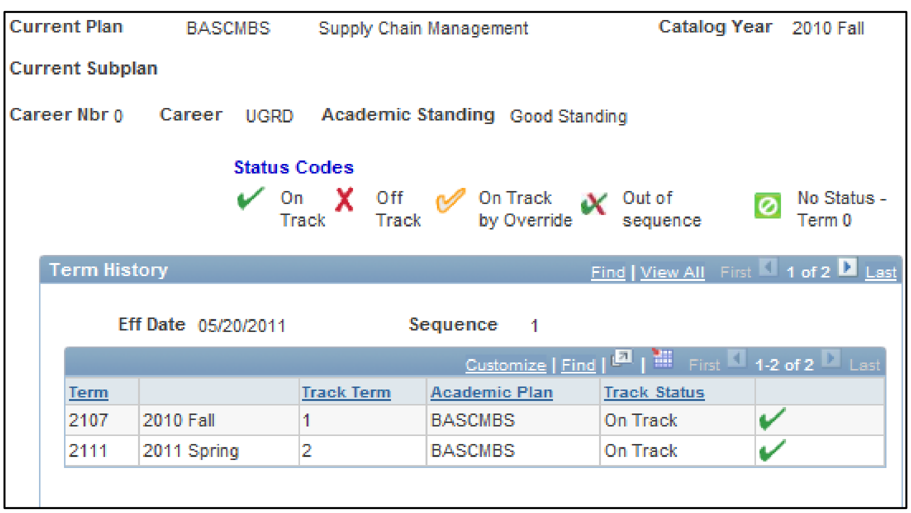
NOTE: The "Not Applied in Terms 1-4" designation includes courses that apply to requirements in terms greater than 4 or possibly not apply at all to the plan. Students with concurrent degrees will often have many courses for one plan that fall into this category but are major requirements for another major.



	Course	Course Title	Grade	Credits	Term Taken
	ENG 102	FIRST-YEAR COMPOSITION	NR	3.00	2121
	MAT 251	CALCULUS FOR LIFE SCIENCES	NR	3.00	2121
	ENG 101	FIRST-YEAR COMPOSITION	NR	3.00	2117
	PGS 101	INTRODUCTION TO PSYCHOLOGY	NR	3.00	2117
	PHI 105	INTRO TO ETHICS	NR	3.00	2121
	REL 207	RITUAL, SYMBOL, AND MYTH	NR	3.00	2121
	ASB 222	BURIED CITIES AND LOST TRIBES	NR	3.00	2117
	PGS 191	ACHIEVING ACADEMIC SUCCESS	A	1.00	2117
	PHI 101	INTRODUCTION TO PHILOSOPHY	NR	3.00	2117
	CRJ 100	INTRO TO CRIMINAL JUSTICE	NR	3.00	2121
	JUS 207	HOMICIDE AND SERIAL KILLERS	NR	3.00	2121

History tab

The history tab displays the recorded track status by term for a specific plan. The history gets populated during the end of term processing timeframe.

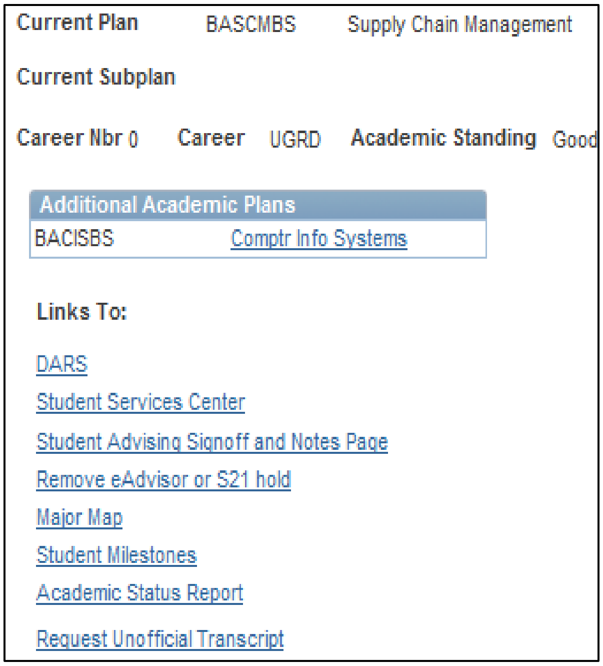


Term		Track Term	Academic Plan	Track Status	
2107	2010 Fall	1	BASCMBS	On Track	
2111	2011 Spring	2	BASCMBS	On Track	

Tools tab

The Tools tab will display links to a student's concurrent plans, if applicable, including minors and certificates. It will also display various links as a shortcut.

NOTE: All links should display in a new tab or window based on your internet browser settings.

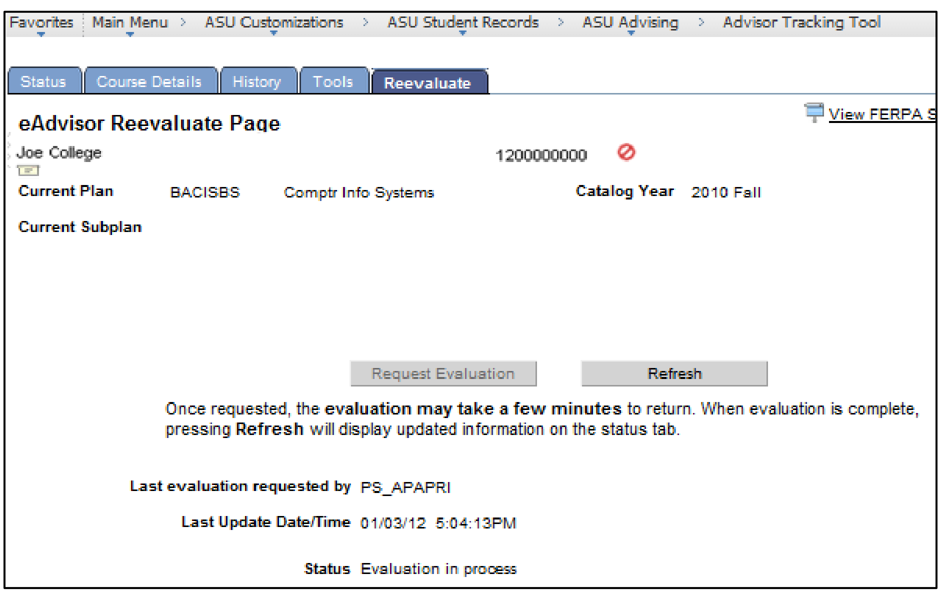


Destination to the links:

- DARS – DARS web advisor URL
- Student Services Ctr – Academics tab
- Student Advising Signoff & Notes – Signoff page
- Remove eAdvisor® or S21 hold – Service Indicator Data page under Campus Community> Service Indicators (student)
- Major Map – student's major map
- Student Milestones – Tabs under Records & Enrollment> Enroll Students> Student Milestones
- Academic Status Report –
- Request Unofficial Transcript – Request PDF of report for immediate view/print

Reevaluate tab

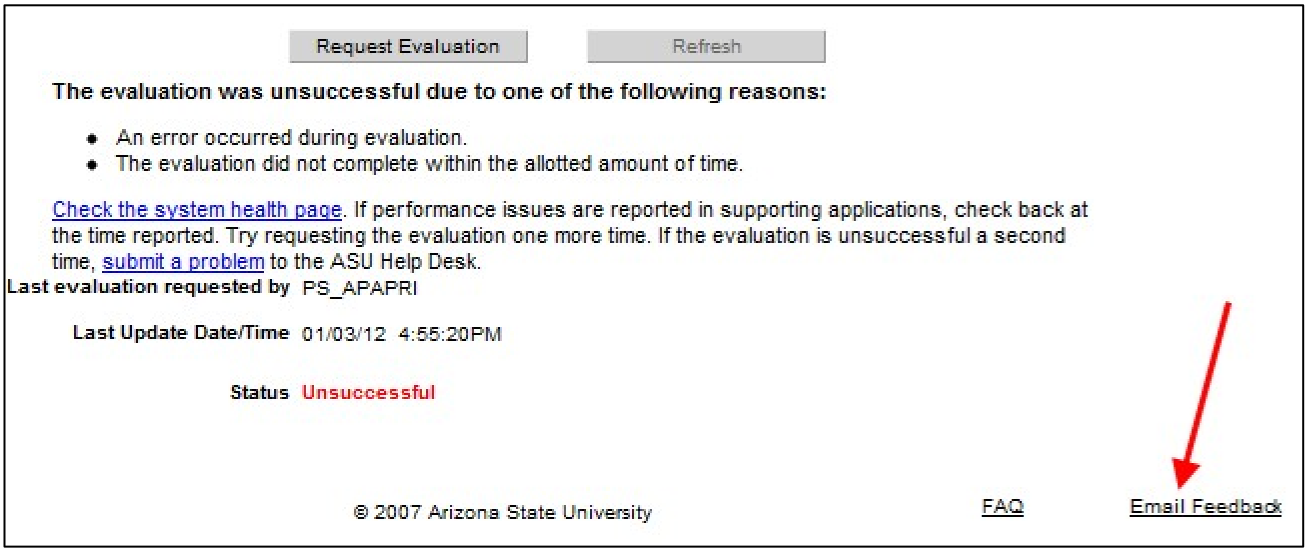
In order to see a more up to date progress of the student, a re-evaluation will need to be requested from the Reevaluate tab. A reevaluation should occur when the track term or major has been changed. Click the Request Evaluation button in the middle of the page to initiate an evaluation for the student's current plan noted in the upper left and any concurrent majors, if applicable.



Use the Refresh button to periodically check the status of the evaluation. Once it completes successfully and the Refresh button is clicked, the Status tab will then be displayed. Sometimes the evaluation does not complete successfully.

Errors when reevaluating

Below is what displays when the evaluate returns in error. Please attempt the evaluation a 2nd time. If the 2nd attempt also returns in error, please use the Email Feedback link on the page and let the support team know this student is not evaluating and a case will be created.



Revision History

Date	Updated By	Revision Description
Jan 2008	Paul Stoll	1st draft
May 2008	Kristian Borkman Paul Stoll	Additional Functionality
Sept 2008	Kristian Borkman Paul Stoll	Additional Functionality
Dec 2008	Kristian Borkman Paul Stoll	Updated Policy
Oct 2011	Angela Papri	Updated functionality & usage policy
Aug 2013	Jennifer Malerich	Updated to match 8 semester functionality