Student Planning Advisor Template

Meeting with Students using Student Planning

Although Advisors will have a very effective new tool, the skills Advisors use in their meetings with students and the overall processes and advising philosophy at The University of Winnipeg will not change with the release of Student Planning.

Advisors will still open meetings in a friendly manner and build rapport with students. They will continue to assess students' needs and inquire how they can be of assistance; they will be supportive and accepting of students and respectful of their situations; and they will be helpful and share information accurately. They will end meetings with a plan which will clarify directions and options as the student continues with his or her university studies or works on addressing specific issues the student has come to discuss with the advisor.

In brief, Advisors will continue to engage in the advising process now their services for students will be enhanced by Student Planning. This specialized tool is designed to support University of Winnipeg students' planning and decision making with respect to their university experience. It is now central to the Academic Advisor practice when meeting or otherwise in contact with students who have come for assistance.

Although each student and situation is unique and Advisors will adjust their process based on the needs of their student, they may want to incorporate the following framework into their appointments and to some extent, drop-In sessions with students:

1. Before the meeting, open the Student Planning Report and check the student's progress toward meeting all degree requirements. Also open Student History Crystal Reports to check Current Status, as well as the total number of credit hours accumulated to date.

2. Explain what Student Planning is:

- Student Planning is the next generation of WebAdvisor. It updates/replaces many functions of the old WebAdvisor, including registration and finances, and adds some exciting new features too. A few functions of the old WebAdvisor will remain in use for now; they will gradually be phased out in the future.
- Student Planning lets you create a multi-year plan of all your courses, based on pre-requisites and on when courses are typically offered.
- Once the University releases the course offerings for a Term(s), you can plan the specific sections you want to take using the interactive timetable. You can save your timetable plan and then you only need to click "Register" on your registration date/time.
- In the meantime, the interactive view of the timetable lets you see how many students have already registered for a course. This allows you to plan for alternate courses prior to your tier registration date/time if a course is already full.
- With each term for which you register, you can check to see if your course plan meets your degree and major requirements - enabling you to stay on track from now until graduation.

- Clicking on the notifications icon at the top right is also the fastest way for the student to find out about any Holds on their accounts which will prevent them from registering.

3. Explain how to access Student Planning.

- A link to Student Planning is in the WebAdvisor menu. Log into WebAdvisor and select the "Student Planning/Registration" tab.

- Discuss the similar screens that Advisors and students see. Note that Advisors log into the Advisor View and students will log into the Student View. The views are very similar but not identical. Note that the Advisor and the student are looking at the same plan and any changes to the plan that are made in the meeting are immediate and the student will see them when they next log in at home to the student view.

4. Respond to the student's initial questions and the reasons they came to Academic Advising.

5. If they came to Academic Advising for a reason other than degree planning, after addressing their issues, show them where to find Student Planning and show them the report it creates so they can look at it at another time.

6. Undergraduate: Ensure the declared major and program year are correct. If they have not declared a major, encourage them to declare one so degree requirements will display for them in Student Planning.
Graduate Studies: Ensure the declared additional major and program year are correct.

7. Undergraduate: Note the GPA. If GPA is low, check student status in Student History Crystal Reports and address any issues with GPA and status. Check number of credit hours of "F" grades. Address this if needed. Check appeals history in Student History Crystal Reports if relevant.

8. Refer to their webmail address and encourage students to use and check it.

9. Look at the timeline and view all the terms they have completed, are currently taking (courses registered for) and the terms planned. Note and address any error messages in the planned courses.

10. Look at student's academic goal (their degree, as well as major subject for undergraduate studies, or additional major for graduate studies), to see how far along s/he is. Discuss the "stoplight" colours and what they mean (dark green for completed, light green for in progress, yellow for planned and red for not yet addressed.)

Review the requirements and where they are at:
For undergraduate studies - general and major degree requirements
For graduate studies - degree and additional major requirements

Note the "false complete" in Student Planning – the maximum number of credit hours in their major - which will show as complete even if a student has exceeded the maximum number of credit hours in this requirement. Address this if there is an issue with this requirement.

11. Identify courses that could be planned next – both required courses and electives. Courses may be jointly planned during the meeting with the student or they could be discussed and the student invited to plan them when they get home.

12. Ensure the student knows how to search for and plan courses, register for courses and put themselves on waitlists. Explain these processes:

- The Progress page displays an at a glance overview of your GPA and program information. The progress bars provide an estimate of how far along you are in their program, the total number of credit hours you have planned, are in progress, and completed.
- Detailed program requirements are listed in the Requirements section. This section shows how your completed and planned courses are used towards your program.
- You can search for courses in two ways – by using the Progress page to search for courses by requirement, or by using the Course Catalog.
- You can plan sections of a course by going to Course Plan, select the desired term, and then click Calendar. The Calendar displays all courses for the selected term and any sections that have been planned, waitlisted, or registered. To view available sections of the courses planned, click the View Other Sections link to display a list of all sections for a specific course in that term. Click the desired section. The section details will display and provide information about the instructor, date and time the course is offered, the number of seats available, a description of the course and other information specific to that section.
- When you have determined what courses you need and want to take and searched for the specific courses and added them to your plan, and then added specific sections to your Course Plan, you are ready to register for the upcoming term(s). At your registration date and time, click register on a particular course or click register at the top of the Course Plan page to register for all planned sections in a particular term. Scroll between terms to register for Fall term, Fall/Winter term, and Winter term.
- If the course is full, you can put yourself on the waitlist by clicking “Waitlist” instead of “Register.”

Note: If communicating with a first-year undergraduate student, refer to the availability of First Year Information Sessions. If it is a returning student, refer to the Student videos, the Student Planning guide [PDF], or Student Central Registration Assistant staff if they need help registering.

13. Note grades and term GPA on the unofficial transcript. Provide feedback.

14. Look at history of Notes to see if any previous issues were identified.

Explain the purpose of the Notes and emphasize that only brief communication about degree planning should be included in the Notes section. Let students know that Notes cannot be deleted; so long communications or communication about topics other than degree planning should only be done by email, by phone or in face-to-face meetings.

15. Look at Archived plans to see if the student has changed a previous academic plan significantly since last meeting with an Advisor. If so, inquire about the reasons for the change.

16. ***Undergraduate studies***: Explain how to request a review of their plan through Student Planning. Note that we do not “Approve” or “Deny” courses as it is the students’ choice of what courses they

register for. If appropriate in the context of why the student is meeting with an advisor in this appointment, introduce the option of being assigned to a particular advisor as an advisee. Mention that one of the benefits specifically related to using Student Planning - to set and accomplish certain academic goals - is they can easily communicate with their advisor to request a review of their current plan. Many students appreciate the continuity and richness of an established advisor-advisee relationship and will likely choose to meet with you again in the future, not only for further degree planning but also to talk about occasional issues and challenges that arise in their time at University of Winnipeg.

Graduate studies: All courses must be submitted and approved by the student's Program Advisor in advance of registration.