Using UNA Portal for Advising

University Advising Services
First-Year Advisor Program

May 23, 2016
Using UNA Portal for Advising

Although there are many tabs in UNA Portal that are used by faculty and staff alike, this document focuses on those needed for academic advising.

Once you login to UNA Portal, you will notice several tabs across the top. (You can always access Self-Service Banner the way you did in the past by clicking on the Faculty or Employee tab at the top, then clicking on the link for Self-Service Banner).

However, there is now an Advisor tab for everyone who is a First-Year Advisor or major advisor at UNA.

When you click on Advisor, the following screen appears:

Everything you will need as an advisor is right here! This keeps you from going from place to place like you used to do with the old access to student information.
There are three columns that are divided into several sections.

- First column has **Student Search** and **Student Information** sections
- Second column has **Advisor Tools**, **Registration Tools**, **Student Services** sections
- Third column has original link to **Self-Service Banner**, **Education Planning**, and **Academic Support**

**Student Search**

If you are looking for information on a particular student in one of your classes, you can select the current term, type in the student’s last name, and click on Student. If that student were in a class of yours, this is what you would see:

![Student Search](image)

The last section “Tools” shows three icons. They are:

- **Transcript** icon – takes you to their transcript in Banner
- **Test Scores** icon – takes you to their test scores in Banner
- **Email** icon – allows you to email the student through your Outlook

If you want to look specifically at one of your advisees, you can type in his/her last name after selecting the current term and clicking on Advisee and you get a similar window:

![Student Search](image)

Finally, you can search for **any** student by last name. Depending upon how specific your search is, you might get a few names listed:
The red flag under Messages means that a student has a hold on his/her account that will prevent him/her from registering for classes and other activities depending upon the nature of the hold.

This screen also lists a student’s class standing, major, and the same three icons as before.

If you click on the Class Standing for a particular student, you will get this screen:

The catalog year, and current major are listed.

If you click on the major from the original screen, you will get the following screen:
For this student, notice he/she began in Fall 2013 and the last term attended was spring 2014.

Registered for Term: No; he/she was last registered for Spring 2014.

He/she is also an in-state resident, a US Citizen, and is a junior transfer student.

**NOTE:** his/her primary advisor is listed next. If you find a freshman for whom no advisor is listed, please let University Advising Services know.

The expected graduation date and term is seven years from the intitial start term. This date and year will change once a student applies for graduation.

Other curriculum information is listed such as his/her degree, major, major concentration, etc. That information is what Banner says that student’s major, etc. is.

**Student Information**

The second section is Student Information. Here you can look up a student’s permanent address, phone number, and email. In addition, you can see a student’s current class schedule, Student Week-At-A-Glance, and a student’s registration history.
• **Student Registration History** - lists all of the classes in which a student has been enrolled by semester. Grades listed as the grades that are included on the transcript (grades and names have been blocked off to maintain confidentiality)

![Student Information](image)

Registration History for

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Credits</th>
<th>Status</th>
<th>Hours</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>C143</td>
<td>Principles of Biology</td>
<td>4.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C144</td>
<td>Calculus I</td>
<td>5.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C145</td>
<td>Calculus II</td>
<td>5.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C146</td>
<td>Calculus III</td>
<td>5.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C147</td>
<td>Linear Algebra</td>
<td>5.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C148</td>
<td>Probability</td>
<td>5.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Advisor Tools

![Advisor Tools](image)

Under **Advisor Tools** (which is where you will spend most of your time), there are links to:

- **Advisee Listing** – lists your current assigned advisees; make sure you select the current semester
There are several important items here:

- **Student Name** – student names have been omitted due to confidentiality
- **ID (L number)** – has been omitted due to confidentiality
- **Email** icon – allows you to email the student through Outlook
- **Advisor Type** – whether you are advising a student in a particular concentration (mine is pre-health; you may not have one). Some of these are blank.
- **Alternate PIN** – a student’s PIN. This changes from semester to semester. You may print this page. Those students with no PIN listed are supposed to be graduating during the current semester, so no PIN is needed for any future semester.
- **Student Information** – allows you to view student information
- **Holds** – allows you to view what holds a student has prior to pre-registration
- **Test Scores** – allows you to view student test scores (ACT or SAT); transfer students may not have any scores listed as it is not a requirement for admission to UNA

Remember that entry into English and Mathematics classes is depending upon ACT sub scores! There are no exceptions.

- **Transcript** – allows you to view a student’s transcript
- **Degree Evaluation** – allows you to view a student’s degree evaluation

- **Academic Transcripts** – allows you to view a student’s academic transcripts as seen on Banner
- **View Test Scores**. If you have not already entered a student’s name and/or L number, you will be prompted to do that. Clicking on the Submit button then takes you to a screen that looks like this:

```
Test Scores

<table>
<thead>
<tr>
<th>Test Description</th>
<th>Score</th>
<th>Date Released</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACT English</td>
<td>27</td>
<td>Dec 15, 2012</td>
</tr>
<tr>
<td>ACT Math</td>
<td>26</td>
<td>Jun 01, 2016</td>
</tr>
<tr>
<td>SAT Score</td>
<td>43</td>
<td>Nov 30, 2015</td>
</tr>
<tr>
<td>SAT Math</td>
<td>24</td>
<td>Dec 01, 2013</td>
</tr>
<tr>
<td>SAT Reading</td>
<td>16</td>
<td>Feb 01, 2014</td>
</tr>
<tr>
<td>SAT Writing</td>
<td>14</td>
<td>Mar 01, 2015</td>
</tr>
<tr>
<td>SAT Subject Tests</td>
<td>38</td>
<td>Jun 01, 2016</td>
</tr>
<tr>
<td>SAT Subject Test</td>
<td>50</td>
<td>Oct 01, 2015</td>
</tr>
<tr>
<td>ACT Science Reading</td>
<td>45</td>
<td>Nov 01, 2015</td>
</tr>
<tr>
<td>ACT Science Reading</td>
<td>27</td>
<td>Dec 01, 2014</td>
</tr>
<tr>
<td>ACT Composite</td>
<td>25</td>
<td>Oct 01, 2015</td>
</tr>
<tr>
<td>ACT Composite</td>
<td>18</td>
<td>Nov 30, 2015</td>
</tr>
<tr>
<td>ACT Composite</td>
<td>27</td>
<td>Dec 01, 2014</td>
</tr>
</tbody>
</table>
```

- **View Holds**. This screen allows you to see which holds a student has and from which office on campus. Remind students that ALL holds must be resolved before a student can either pre-register for classes or register for classes. Some holds will prevent students from seeing their grades for the semester or requesting transcripts.
I usually write down the hold on the Advising Recommendation Form as a reminder to the student to get that hold resolved.

- **Advisee Midterm/Final Grade Summary** – it is here that you will find the midterm or final grades of your advisees to whom you have been assigned.

Notice on this student below that he/she did not receive any mid-term grades. It could have been that he/she did not have any D’s or F’s at midterm. It is also possible that the professors did not assign any midterm grades for any student. Because the fall semester is over, that is why the final grades are also listed. Also note that this student withdrew with a “WP” from CH 111 and CH 111L and from BI 200W.

Below is another student who did receive several mid-term grades, a U in EN 099 and a D in CH 101. Also note that this student withdrew with a “WF” from MA 100, something you would not know about at mid-term. Basically, this student failed to complete the two remedial classes in which he/she was registered for that semester.

- **First-Year Advisor Tools** – takes you to the First-Year Advisor Resource page

**Registration Tools**
• **Academic Calendar** – takes you to the webpage [https://www.una.edu/calendar/#/academic](https://www.una.edu/calendar/#/academic) that has the university’s academic calendar

• **Drop/Withdraw/Refunds** – takes you to the webpage that lists important dates in the semester as well as semester exam schedules

• **Look Up Classes** – VERY IMPORTANT RESOURCE!! When you click on this and select a term, the following screen appears.

If you clicked on Accounting, then **Course Search**, you should see a list of all accounting classes offered for the semester you chose, in this case fall 2016. You will likely have to scroll down to see the complete list.

If you click on **View Sections** on Accounting 291, here is what you would see:
This allows you to see the course sections available, their times, and the current enrollment as well as the professors who are teaching the sections (there is more on the screen that is not shown). Class locations are also listed. If the registration period had been open, the first column would give you the option of clicking on an open box to register for the class (if you were a student!)

- **Pride Planner** – a pdf file of how to use the Course Scheduler; students learn how to use this during SOAR

**Post Registration**

- **How to Drop a Class** – takes you to the Registrar’s website that describes the steps a student must do to drop a class during the drop period.

**Student Services**

Lists several student support services to whom you might refer a student. Each takes you to the appropriate webpage.

**Banner Self-Service**

Self-explanatory; takes you to the old way of accessing Self-Service Banner

**Education Planning**

**Degree Requirements**

- **Catalog** – Takes you to the Registrar’s webpage that lists the current UNA catalog and all past catalogs as pdf files
Degree Planning

• **CAPP (Curriculum Advising & Program Planning) Degree Evaluation Instructions** – shows you how to use CAPP Degree Evaluation (see below) - here you can run a degree evaluation on any student to see which courses have been completed and those that are still necessary based upon the major and minor that are in Banner. If the major and/or minor is incorrect, the degree evaluation will also be incorrect.

  - When you click on CAPP degree evaluation, you will be asked for either your student’s name or L number so that he/she can be identified. Once you do this, then you will come to the following screen:

    ![Degree Evaluation Screen](image)

    If you now click on **Generate New Evaluation** (see arrow), it will ask you to click on the radio button for the degree program and there is a term that needs to be selected (use the current term).

    ![Generate New Evaluation Screen](image)

    Select the current term, then click on **Generate Request**.

    You can run the degree evaluation on General Requirements (General Requirements), Detail Requirements, and Additional Information.
Clicking on **General Requirements** then **Submit** brings you to the following screen:

### General Requirements

**Information for**

*This is NOT an official evaluation.*

**Program Evaluation**

To learn more about CAPR, please visit the [Online Degree Evaluation](#). **GRADUATION**: To be eligible for graduation, you must apply TWO semesters in advance. Credits are awarded to and there are no exceptions. Please visit [Graduation Requirements](#) for more information. **PRE-GRADUATION REQUIREMENTS**: 100 hours total. **CAPR** is a semester-based. **CAPR** has 6,000 credits total. **CAPR** of 1,500 credits total at UTHSC, one-half of 200 credits total at UTHSC, one-half of 200 credits total at UTHSC. **If** the major is less than 40 hours, you must have a minor. **CAPR**. Questions about your requirements? Please email CAPR. **To help you submit**: Please see the [Coding Matrix](#).

**Program**: B.S. in Chemistry  
**Catalog Term**: Fall 2014  
**Campus**: College of Arts and Sciences  
**Degree**: Bachelor of Science  
**Level**: Undergraduate  
**Major**: Chemistry  
**Departments**: Chemistry/Industrial Hygiene  

<table>
<thead>
<tr>
<th>Area</th>
<th>Subject Code - No Mat</th>
<th>Area</th>
<th>Subject Code - No Mat</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,000 Credits</td>
<td>00 GPA</td>
<td>1,000 Credits</td>
<td>00 GPA</td>
</tr>
<tr>
<td>Area</td>
<td>Area II - Humanities/Pre-Arts (12,000 credits) - No Mat</td>
<td>Area II - Chemistry (15,800 credits) - Mat</td>
<td></td>
</tr>
<tr>
<td>3,000</td>
<td>3,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Area</td>
<td>Area IV/5, Social/Behavior Sci (13,000 credits) - Mat</td>
<td>Area</td>
<td>Area III - Communication (6,900 credits) - Mat</td>
</tr>
<tr>
<td>1,000</td>
<td>1,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Area</td>
<td>Area V - Prof. Class Major CPA/MNIR - Mat</td>
<td>Area</td>
<td>Area VI - General Electives - Mat</td>
</tr>
<tr>
<td>1,000</td>
<td>1,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Area</td>
<td>Total 36/Residency 32 300/400</td>
<td>Area</td>
<td>Required GPA of 2.0 - Mat</td>
</tr>
<tr>
<td>3,000</td>
<td>3,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Clicking on **Detail Requirements**, you get a screen that looks like this:
## Detail Requirements

### Program Evaluation

To have more detail within each, please see the "Action Program Requirements" tab.

**Program Requirements**
- 3.0 GPA
- 120 credits

**Degree**
- Bachelor of Science

**College**
- College of Arts and Sciences

**Semester**
- Spring 2014

**Catalog Years**
- Fall 2014

**Expected Graduation Date**
- Dec 14, 2014

**Current Progress**
- 60.0 credits

**Degree Requirements**
- Bachelor of Science

**Concentration**
- Pre-Professional Programs

### Pre-Professional Programs

**Area A**
- Humanities/Arts (15.0 credits)

### Area A: Humanities/Arts (15.0 credits)

<table>
<thead>
<tr>
<th>Text</th>
<th>Credits</th>
<th>Course</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>1001</td>
<td>3.00</td>
<td>ENGLISH 1001</td>
<td>A</td>
</tr>
<tr>
<td>2003</td>
<td>1.00</td>
<td>ENGLISH 2003</td>
<td>B</td>
</tr>
<tr>
<td>2011</td>
<td>3.00</td>
<td>ENGLISH 2011</td>
<td>C</td>
</tr>
<tr>
<td>2012</td>
<td>3.00</td>
<td>ENGLISH 2012</td>
<td>C</td>
</tr>
</tbody>
</table>

Total Credits: 9.00

### Area B: Social Sciences (15.0 credits)

<table>
<thead>
<tr>
<th>Text</th>
<th>Credits</th>
<th>Course</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>3.00</td>
<td>ECONOMICS 2011</td>
<td>A</td>
</tr>
<tr>
<td>2021</td>
<td>3.00</td>
<td>ECONOMICS 2021</td>
<td>A</td>
</tr>
</tbody>
</table>

Total Credits: 6.00

### Area C: Science (21.0 credits)

<table>
<thead>
<tr>
<th>Text</th>
<th>Credits</th>
<th>Course</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>3.00</td>
<td>CHEMISTRY 2011</td>
<td>A</td>
</tr>
<tr>
<td>2021</td>
<td>3.00</td>
<td>CHEMISTRY 2021</td>
<td>A</td>
</tr>
</tbody>
</table>

Total Credits: 6.00

### Total Credits

- 60.00

---

13
If you go back and click on **Additional Requirements**, you get a screen that looks something like this:
What-If Analysis

You can do a **What-If Analysis** to see what a student’s degree program would look like if he/she changed majors. Click on **What If Analysis** at the bottom of the previous screen.

First, select the term in which the student began at UNA. Then click **Continue**.

Using the drop-down box select a new degree program. Let’s say he/she is interested in changing to a BS in Psychology. Click on **Continue**.
Use the Drop-Down box with First Major to select Major. Then click on Submit. The evaluation generated will be the same as before with the General Requirements, Detail Requirements, and Additional Information as options, which will not be listed here.

- **Course Substitution Instructions** – takes you to the Registrar’s website that shows how to submit a course substitution
- **Transient Approval Form** – takes you to the Registrar’s website where this form is located. Students must complete this form and have their academic advisor sign it before taking it to the Dean of the college in which the course is taught

**Graduation Resources**

- **Graduation Information** – takes you to the Registrar’s website where information about graduation is located. There are deadlines for applying for graduation and a $30 fee involved.
- **Commencement Information** – outlines logistical information about commencement ceremony

**Academic Support**

- Library
- Center for Writing Excellence (Writing Center)
- Mathematics Learning Center (Math Center)
- Tutoring
- Advising Services