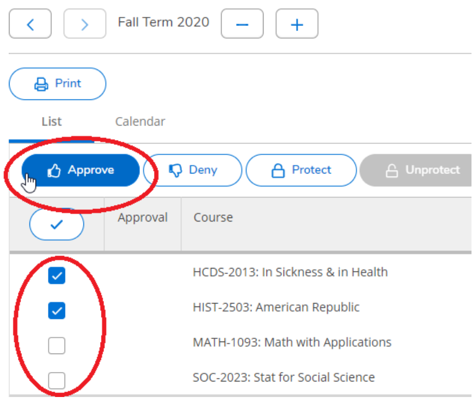
Required Enrollment Advising Steps in Student Planning

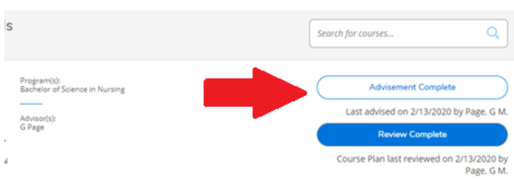
Students will still need to have a face-to-face meeting with their advisor before being cleared to register. Student Planning will not replace advising meetings. This new process is designed to store all advising documentation in Self-Service and to allow faculty to clear advising holds for students.

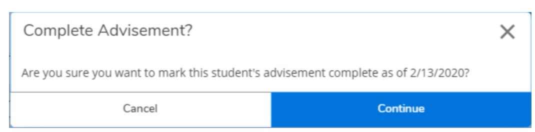
1. **Review** their planned courses for the upcoming term, assist them with making changes if needed.

2. **Approve** the courses which you advise them to take for the upcoming term by selecting the courses and clicking "Approve"

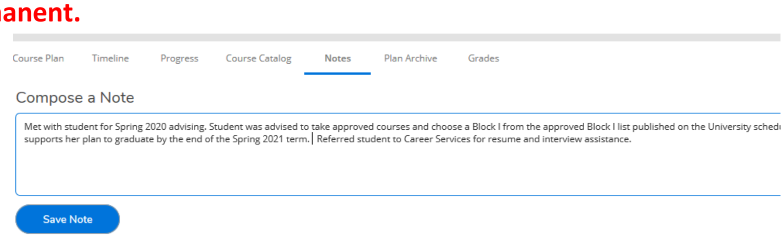


3. **Click "Advisement Complete"**. A pop-up box with the phrase "Complete Advisement" will appear. **Only click "Continue" if you are ready to release the student's advising hold. Do not click the button if you have not yet met with the student for advising. This CANNOT be undone.**





4. **Document** your advising session in the "Notes" tab; click "Save Note". **Remember: Notes are not private; the student can see them. Notes cannot be deleted or edited, once they are saved, they are permanent.**



5. **Click "Review Complete"**. You will be asked if you want to archive the course plan. Click "Archive". This stores a PDF of your approved courses, the student's timeline, and your notes as a documentation of their advising sessions. You can find previously archived plans under "Plan Archive".