

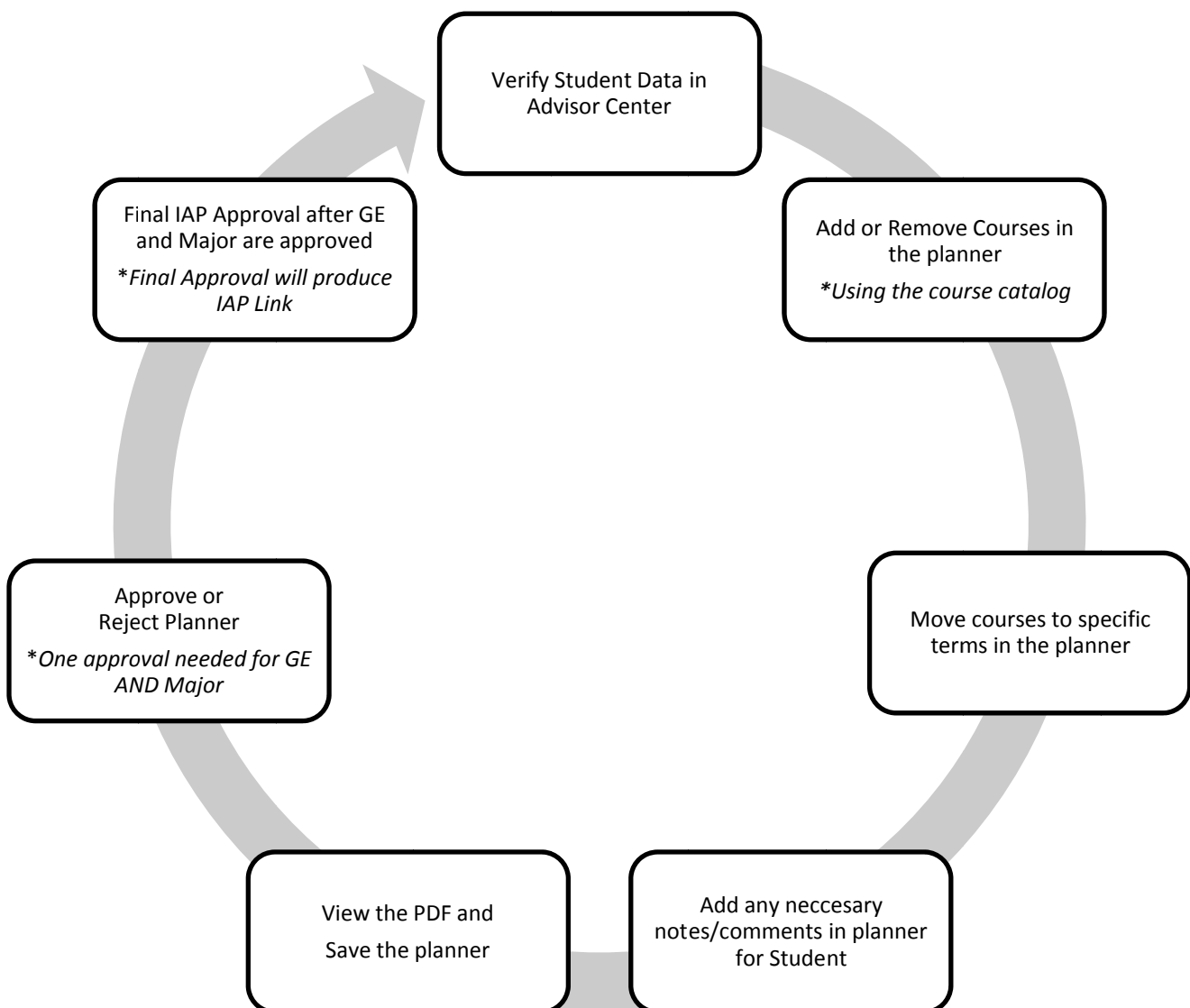


My Planner- Individualized Advisement Plan

The following are steps on how to complete and review a student's Individualized Advisement Plan using the My Planner tool as an Advisor.

The Individualized Advisement Plan will be a roadmap for Students approved by their Advisors to ensure graduation in their current degree program in a timely manner.

ADVISOR STEPS:



Log In to My CSUEB



<https://cmsweb.csueastbay.edu/psp/HEBPRD/EMPLOYEE/HRMS/h/?tab=GUEST>

Advisor Center

Navigation: Main Menu>Self Service>Advisor Center> My Advisees

Follow the navigation to get to the Advisor Center. After selecting "My Advisees, click the "View Data For Other Students" button to enter one of the following data to look up a student.

ID: EMPLID/PS ID

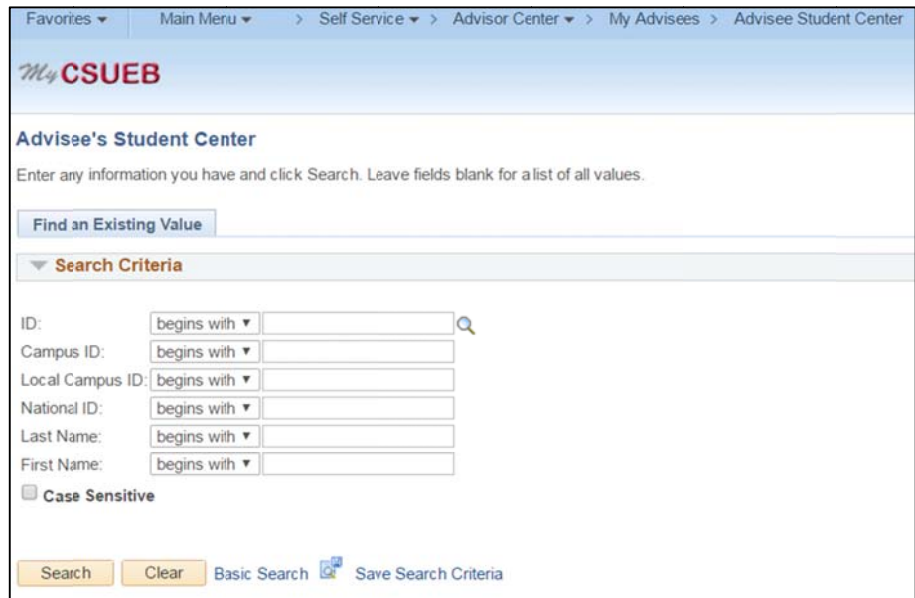
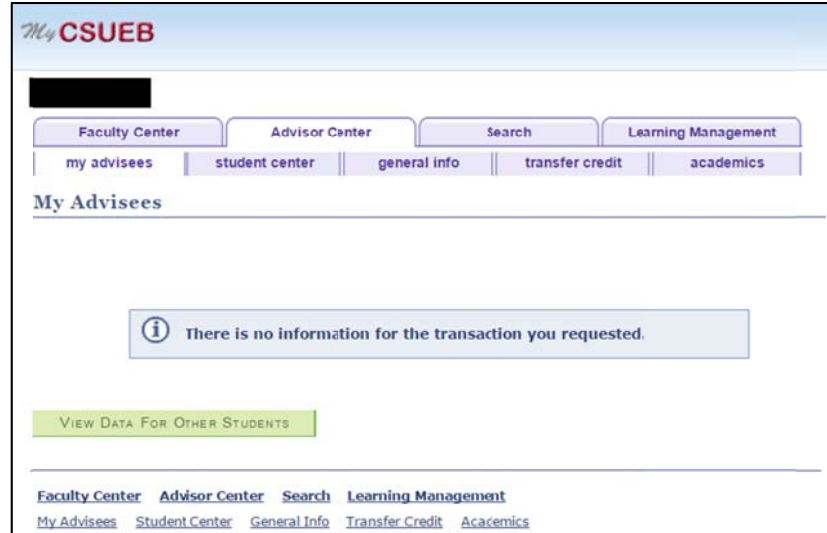
Local Campus ID: NetID

National ID: Social Security Number

Last Name: Student's last name

First Name: Student's first name

Note: GE Advisors and Major Advisors will be identified based on your advisor role this will determine which part of the IAP you will be allowed to approve (GE or Major).

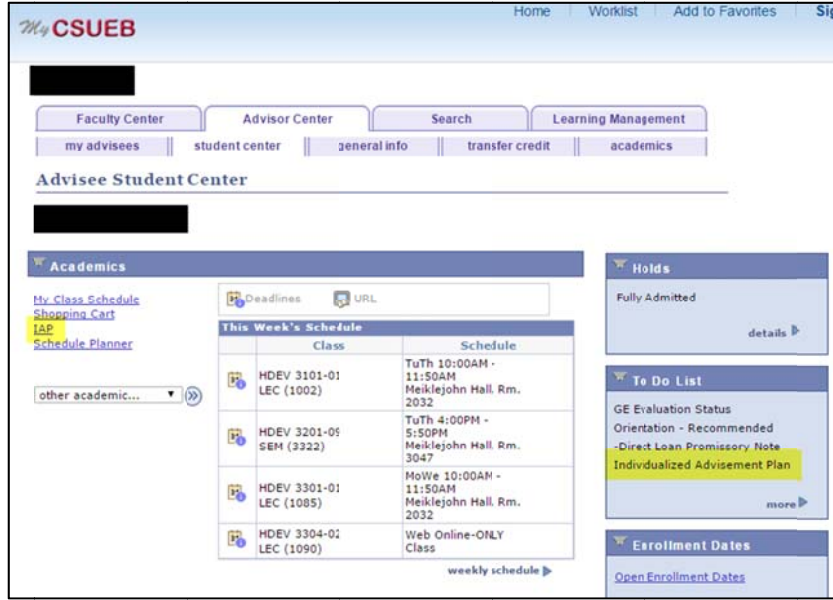


Instructions

Screen Shots

Advisor Center

An Advisor will have a similar view into the Student Center as a Student. Click on the IAP link to enter the Student's IAP page.

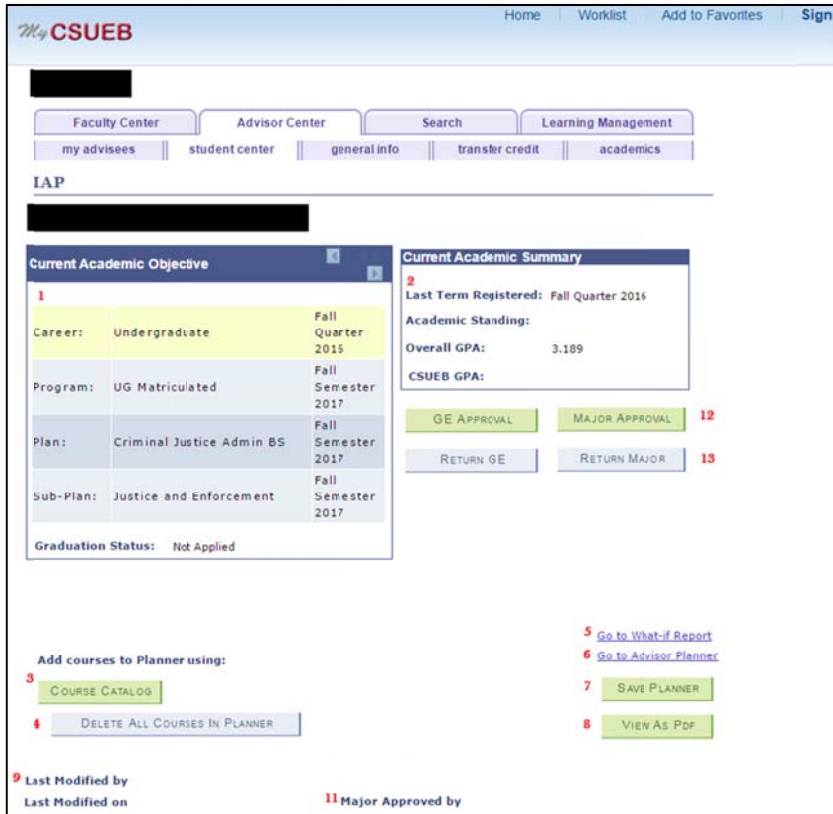


IAP -Header Information

Here you will see the header information for the Student:

At this point you will be able do the following:

1. **Current Academic Objective-** Student's correct objective based on the Program/Plan Page.
2. **Current Academic Summary-** Based on Student's standing
3. **Course Catalog-** will link to the Course Catalog- Ability to add courses by subject area
4. **Delete All Courses in Planner-** Will delete current planned courses.
5. **Go to What-If Report-** Will navigate you to the What-If report page
6. **Go to Advisor Planner-** Will navigate you to the Advisor planner to assist with adding courses to the planner.
7. **Save Planner-** Will save current planned courses in the planner.
8. **View As PDF-** Will consolidate planner information into a PDF version.
9. **Last Modified Data-** Will display the time, date and name of the



Instructions

Screen Shots

last person who modified the planner (Advisor/Student)

- 10. **GE Approved by-** This will list the name of the GE approver.
- 11. **Major Approved by-** This will list the name of the Major approver.
- 12. **Approve Planner-** Approval Buttons of the GE and the Major. An advisor will only be allowed to approve the area in which they are identified. GE, Major, or Both.
- 13. **Return Planner-** Return buttons of the GE and Major. An advisor will only be allowed to return the area in which they are identified. GE, Major, or Both.

Planned Courses

Here you will see courses in the My planner, planned by the Student and/or Advisor.

Here are a few key areas:

- 1. **Planned Courses for Future Terms-** All courses when initially added to the planner will be added into the Planned Courses for Future Terms area. Once added, courses can be moved to a specific term.
- 2. **Notes-** This section is for notes pertaining to an individual course. Notes will stay with the course if moved to a different term
- 3. **Move Selected courses to Term-** After Selecting a course, use this drop down to select the term you'd like to move a course(s) to.
- 4. **Delete-** Trash Can icon is used to delete individual courses from the terms.

Planned Courses for Future Terms					
Select	Course	Description	Units	Notes	Delete
<input type="checkbox"/>	COMM 2200	Intro to Journalistic Writing	4.00		
<input type="checkbox"/>	COMM 2300	21st Century Communication	4.00		
<input checked="" type="checkbox"/>	COMM 3002	Communication, Media & Culture	4.00		

Move selected courses to Term ▼

Fall Quarter 2016					
Select	Course	Description	Units	Notes	Delete
<input type="checkbox"/>	BIOL 1000	Basic Concepts in Biology	5.00		
<input type="checkbox"/>	ENGL 1001	College Writing I	4.00		

Move selected courses to Term ▼

Spring Quarter 2017					
Select	Course	Description	Units	Notes	Delete
<input type="checkbox"/>	BIOL 1001	Introduction to Biology	4.00		
<input type="checkbox"/>	COMM 1000	Public Speaking	4.00		

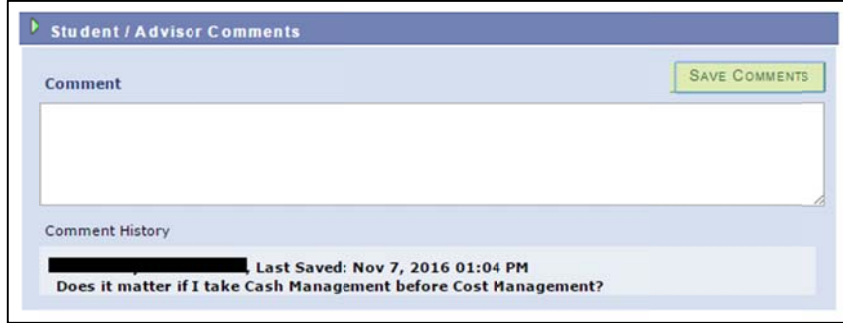
Move selected courses to Term ▼

Instructions

Screen Shots

Student/Advisor Comments

This comment's section will display any comments/notes left by Students, they will be time and date stamped. Advisors will have the ability to add/answer any comments/notes left here. Comments will create a log of messages.

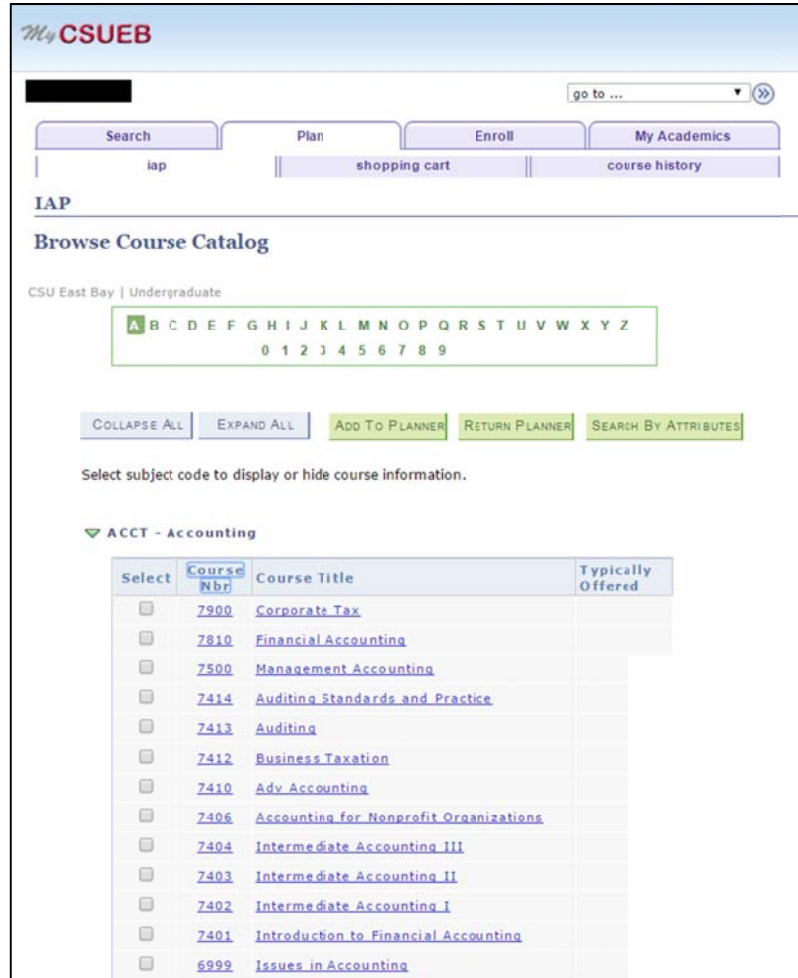


Course Detail Search

An Advisor can search for courses to add to a Student's planner by searching the alphabetical list of subject areas.

Each letter will list associated subjects. Each subject will listed associated courses.

Multiple courses can be added at once.



Instructions

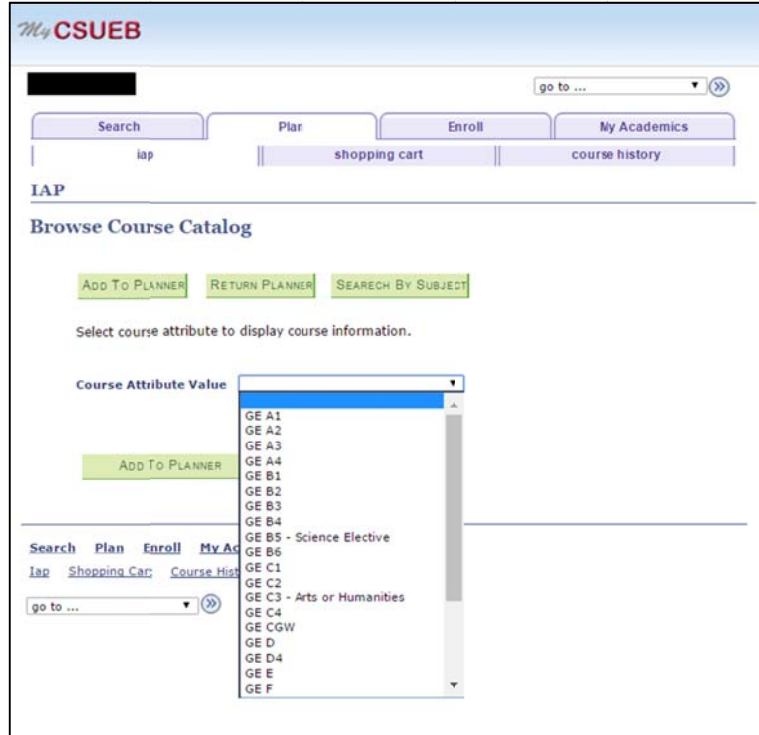
Screen Shots

Course Attribute Search

An Advisor can search for courses to add to a Student's planner by searching the General Education Course Attributes.

Each area will list courses associated to the attribute selected from the list.

Multiple courses can be added at once.



Instructions

Screen Shots

View as a PDF

This PDF will produce an easy to read summary of Student data, courses planned, as well as comments from the planner. This summary is just a draft, not to be confused with the official IAP.

CAL STATE EAST BAY

Individualized Advisement Plan-Draft

Disclaimer: This Individualized Advisement Plan (IAP) is a personalized guide for degree completion. Class offerings and availability are subject to change. Students must meet all degree requirements as specified in their catalog. It is recommended that you regularly meet with your advisor.

██████████ 11/14/2016 11:46:17 AM

Current Academic Objective			Current Academic Summary	
Career:	Undergraduate	Spring Quarter 2015	Last Term Registered:	Fall Quarter 2016
Program	UG Matriculated	Spring Quarter 2015	Academic Standing:	Good Standing
Plan	Communication BA	Spring Quarter 2015	Overall GPA:	2.761
Sub-plan	Professional Public & Org Comm	Spring Quarter 2015	CSUEB GPA:	2.08

Planned Courses - Future Terms			
Course	Description	Units	Notes
MATH 800	Introduction to Algebra	4	
MATH 805	Beginning Algebra	4	
MATH 806	Algebra B	4	
MATH 807	Algebra C	4	

Winter Quarter 2017			
Course	Description	Units	Notes
ACCT 3150	Econ Hist Of Us	4	
ACCT 4223	Business Law for Accountants	4	

Approved IAP

Once a General Education AND Major Advisor Approves the plan an Approved IAP link will display on the IAP page.

[Go to What-if Report](#)

Add courses to Planner using:

[COURSE CATALOG](#) [SAVE PLANNER](#)

[DELETE ALL COURSES IN PLANNER](#) [VIEW As Pdf](#)

[IAP has been approved by GE and Major Advisors on 11/6/16 04:29 PM](#)

Last Modified by Wendy W Chen **GE Approved by** Jessica Owens - Consultant

Last Modified on 11/07/16 9:42:00AM **Major Approved by** Wendy W Chen

CAL STATE EAST BAY

Individualized Advisement Plan

Disclaimer: This Individualized Advisement Plan (IAP) is a personalized guide for degree completion. Class offerings and availability are subject to change. Students must meet all degree requirements as specified in their catalog. It is recommended that you regularly meet with your advisor.

██████████

Approved IAP By GE and Major Advisors on 11/09/2016 12:44:58 PM
GE Approved by : Queen Bey
Major Approved by : Queen Bey

Current Academic Objective			Current Academic Summary	
Career:	Undergraduate	Spring Quarter 2015	Last Term Registered:	Fall Quarter 2016
Program	UG Matriculated	Spring Quarter 2015	Academic Standing:	Good Standing
Plan	Communication BA	Spring Quarter 2015	Overall GPA:	2.761
Sub-plan	Professional Public & Org Comm	Spring Quarter 2015	CSUEB GPA:	2.08

Planned Courses - Future Terms			
Course	Description	Units	Notes
MATH 800	Introduction to Algebra	4	
MATH 805	Beginning Algebra	4	
MATH 806	Algebra B	4	
MATH 807	Algebra C	4	

Winter Quarter 2017			
Course	Description	Units	Notes
ACCT 3150	Econ Hist Of Us	4	
ACCT 4223	Business Law for Accountants	4	

Instructions

Screen Shots

The IAP To Do Item will also be removed from the To Do List.

The screenshot displays the 'Advisee Student Center' interface. At the top, there are navigation tabs: Faculty Center, Advisor Center, Search, and Learning Management. Below these are sub-tabs: my advisees, student center, general info, transfer credit, and academics. The main title is 'Advisee Student Center'. The interface is divided into several sections:

- Academics:** Includes links for My Class Schedule, Shopping Cart, IAP, and Schedule Planner. A dropdown menu shows 'other academic...' with a search icon. A 'Deadlines' and 'URL' section is present. A 'This Week's Schedule' table lists three classes: ES 3430-04 DIS (2980), PHYS 3750-01 LEC (2741), and REC 3202-04 SEM (1492), all categorized as 'Web Online-ONLY Class'. A 'weekly schedule' link is at the bottom.
- Holds:** Shows 'Fully Admitted' with a 'details' link.
- To Do List:** Lists items: -Direct Loan Counseling, -Direct Loan Promissory Note, EOP Application, EOP Letter of Rec 1, EOP Letter of Rec 2, and **GE Evaluation Status** (circled in red). A 'more' link is at the bottom.
- Enrollment Dates:** Includes a link for 'Open Enrollment Date'.
- Personal Information:** Contains a 'Contact Information' section with fields for 'Home/Permanent Address' and 'Mailing/Local Address'. Below these are fields for 'Home' and 'Horizon email', all of which are redacted with black boxes.