

Connect to the [IUP VPN](#) for full access to IUP Advise quick links.

Access IUP Advise: <https://IUPCRM.elluciancrmadvise.com>

Enable pop-up windows.

Accessing a Student's Profile

There are three ways you can access a student's profile from your dashboard:

- Selecting the student's name from the provided list.
- Selecting the hourglass on the top right side of the screen to start a search.
- Selecting the menu arrow next to Dashboards or My Students if already on a student profile.

The screenshot shows the IUP Advise dashboard interface. At the top, there is a navigation bar with the user's name '@ ellucian', a dropdown menu for 'Advisors', and a dropdown menu for 'Dashboards'. Below this, there is a 'Recently Viewed' section with a grid of dashboard tiles for various departments like Accounting, Natural Sciences, Health, Education, Business, Fine Arts, and Humanities. The main content area features a table of student records with columns for course ID, advisor ID, course name, semester, and location. Below this is a 'My Students' section with a search bar and a table of student details. The table has columns for Last Name, First Name, Preferred Name, Middle Name, Section, Number (GSI), Course Score, and Course Score. The first row, 'Carter, Gillan', is circled in red. To the right of the table is an 'Alerts' section with a dropdown menu and a message: 'There are no open alerts of the selected severity.'

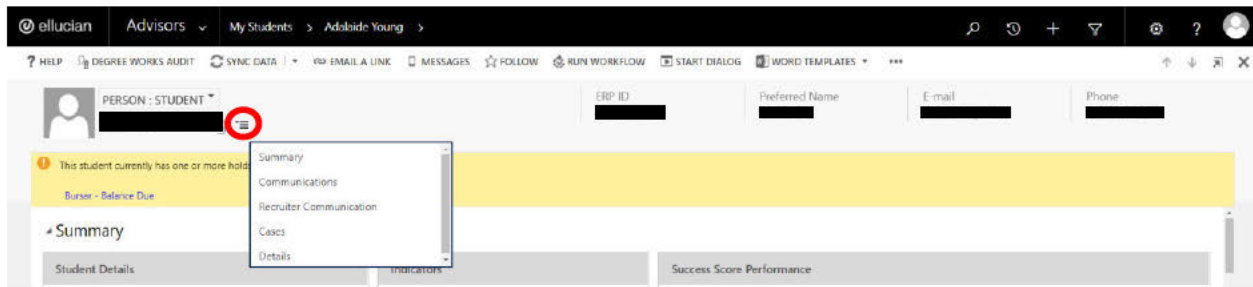
Student Profile Information

The student profile will have most of the information that you may need. The profile is broken into the following sections to make finding information easier:

- Summary
- Communications
- Recruiter Communication
- Cases
- Details

You can quickly switch between sections by using the **drop down to the right** of the student's name.

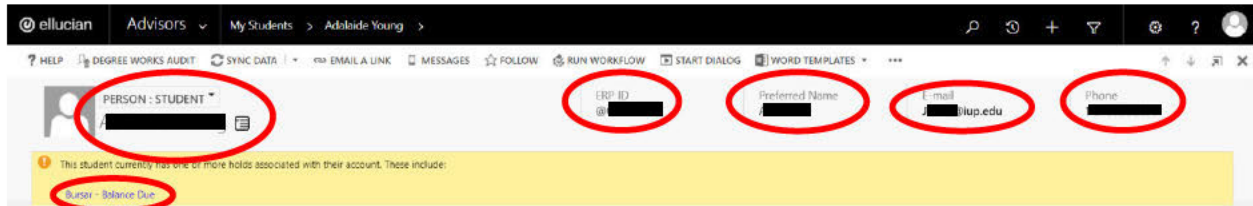
IUP Advise Quick Reference Guide #4 Student Profile Page



Summary

When first accessing a student's profile you will start at the summary section. Here you will find the student's:

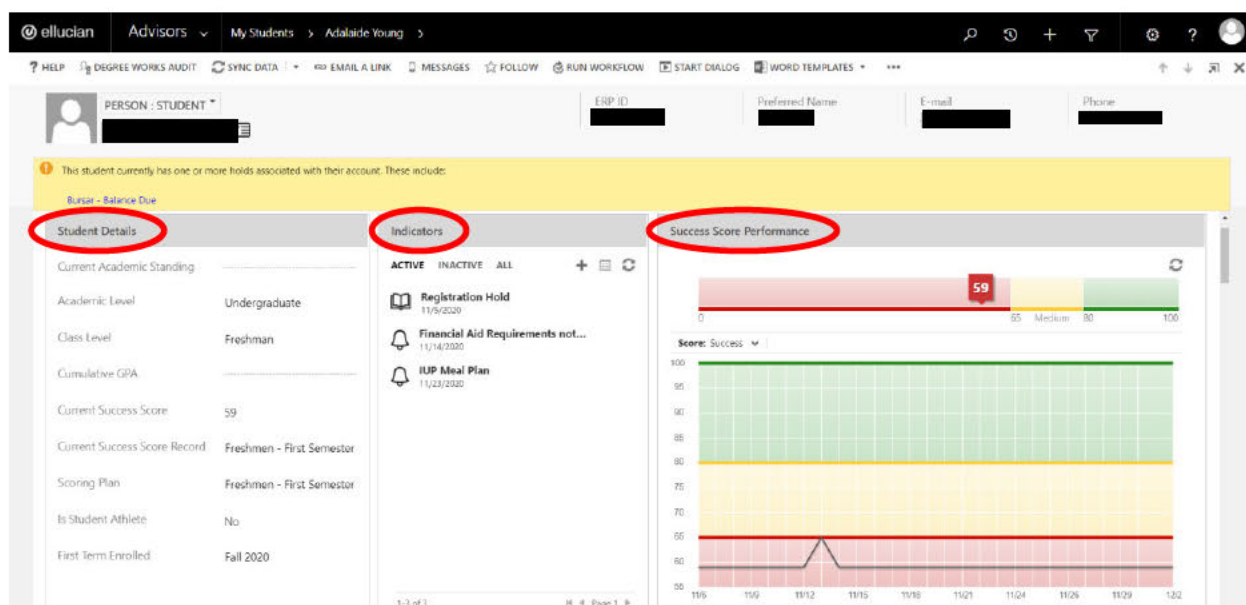
- **Name**
- **ERP ID**
 - This is the student's Banner or University ID
- **Preferred name**
 - The student's legal first name or their preferred name if they have gone through IUP's preferred name change policy. Users should *always* look at a student's preferred name and use it in communications and meetings.
- **E-mail**
 - The student's IUP email
- **Phone number**
 - The phone number provided by the student
- **Hold information**
 - Any holds on the student's account will be displayed



Under the **summary** section you will find:

- **Student Details**
 - Academic standing
 - Academic level (UG or GR)
 - Class level
 - Cumulative GPA
 - Current Success Score
 - Scoring plan
 - Starting term
- **Indicators**
 - They can be both **active** (something currently impacting a student) and **inactive** (something that is no longer impacting a student).

- Some examples include **registration holds, missing financial aid requirements, and being part of an on-campus organization.**
- Indicators could be beneficial in addressing potential issues early on (i.e. sending a student to the financial aid office to address their missing requirements).
- **Student Success Score Performance**
 - This provides an overview of how a student has performed in their success plan.
 - This score *is not predicative* of a student's potential success but may help advisors quickly assess a student's current risk level.



Student Scoring Plan

Scoring Plans can be used to estimate the success of students at IUP. The IUP IUP Advise Implementation team met over the summer to tailor those scores to best reflect factors that may help or hinder a student's success. The University-Wide Retention and Persistence Advising and Data Strategies subcommittee will continue to monitor, update, and improve scoring plans for IUP students.

Scoring Plans and Success Scores **do not** predict the success of a student. They are only used as a guide to estimate the current success of our students and to alert advisors to potential issues that may need to be addressed during advising sessions and throughout the semester.

Student Details	
Current Academic Standing	-----
Academic Level	Undergraduate
Class Level	Freshman
Cumulative GPA	-----
Current Success Score	60
Current Success Score Record	Freshmen - First Semester --- 12/9/2020
Scoring Plan	Freshmen - First Semester
Is Student Athlete	No
First Term Enrolled	Fall 2020

Scoring plans are tailored to the needs of different student groups. Here is an example of what makes up the **Freshman – First Semester Scoring Plan**.

- Academic Effort and Performance Variables (weight = 50)
- Demographics (Weight = 10)
- Pre-enrollment Variables (Weight = 30)
- Social Indicators (Weight = 10)

Within each of the major categories listed, there are weighted sub-categories. For example, in the Freshman — First Semester Scoring Plan the “Social Indicators” category includes variables such as: Registration holds, financial holds, financial aid requirements not satisfied, academic integrity, personal issue, student behavior alert, athlete, or not in an organization. “Holds” carry a heavier weight than does a student’s status as an athlete or not, since the former is more likely to impact retention.

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- **Course Enrollment: Current and Future Enrolled Student Sections**
 - Provides a list of a student's current and future classes.
 - Click on the **table icon** at the right side of the window to see a student's full transcript (past, present, and future courses) and midterm grades, if available.
- **Alerts**
 - This will list all active alerts on a student's profile. This will be covered in more depth in the *Alerts, Actions, and Notes Quick Guide*.

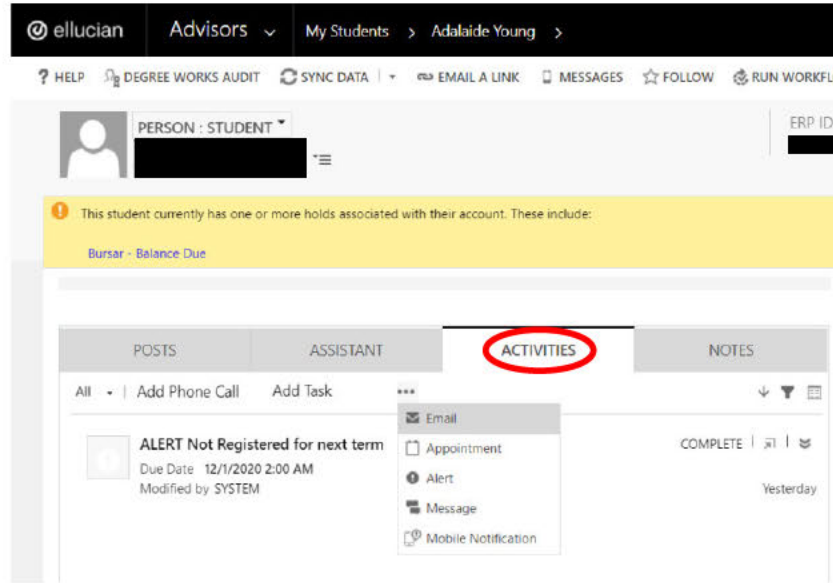
The screenshot shows the ellucian interface for a student profile. At the top, there's a navigation bar with 'ellucian' and 'Advisors'. Below that, the student's name 'Adalaido Young' is visible. A yellow banner indicates a bursar balance due. The main content area has two tabs: 'Current and Future Enrolled Student Sections' (circled in red) and 'Alerts' (also circled in red). The 'Current and Future Enrolled Student Sections' tab displays a table with columns for Term, Last Name, First Name, Preferred Name, Middle Name, Section, and Title. The 'Alerts' tab shows an alert for 'ALERT Not Registered for next term' dated 12/1/2020, owned by AdDanc.

View of student's past, present, and future courses window

The screenshot shows the 'Student Section Associated View' window. It features a search bar and a table with columns: Name, Student, Section, Title (Section), Course Status, Midterm Grad., Final Grade, Term, Academic Level, and Course Score. The table lists several courses including COMM 101, RLST 100, HIST 197, GEOG 104, HAWK 200, DVST 170, and FIAR 281, all for the Fall 2020 term. The 'Course Status' column shows 'Active' for most and 'Dropped' for DVST 170. The 'Course Score' column shows scores like 100 and 'Gree'.

- **Activities**

- Emails, Appointments, Alerts, Message, or Mobile Notifications can be documented here automatically or manually.
- To add an activity selection the ellipse (...) on the screen.
- This will be covered in more depth in the *Alerts, Actions, and Notes Quick Guide*.

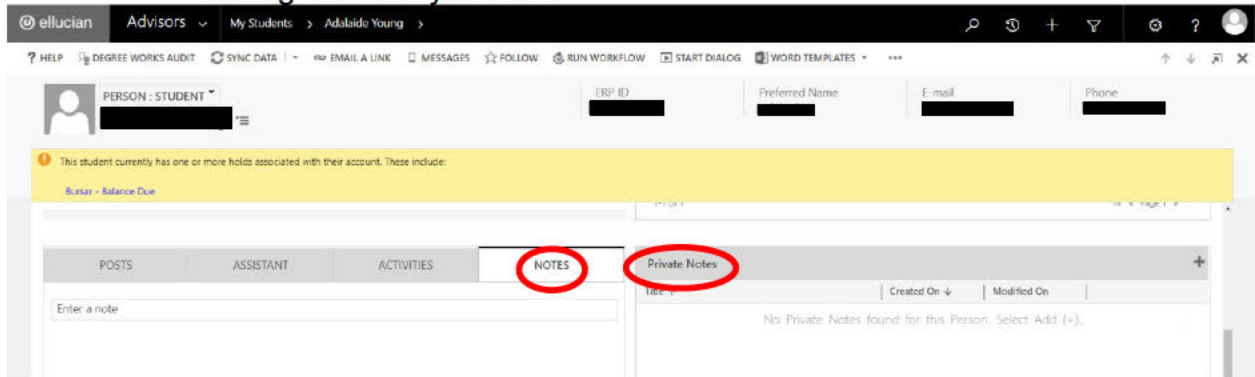


- **Notes**

- These notes can be seen by other users in the platform. Review IUP's FERPA policy and training if necessary.
- Curricular notes that are to be read by students should be posted in Degree Works.
- This will be covered in more depth in the *Alerts, Actions, and Notes Quick Guide*.

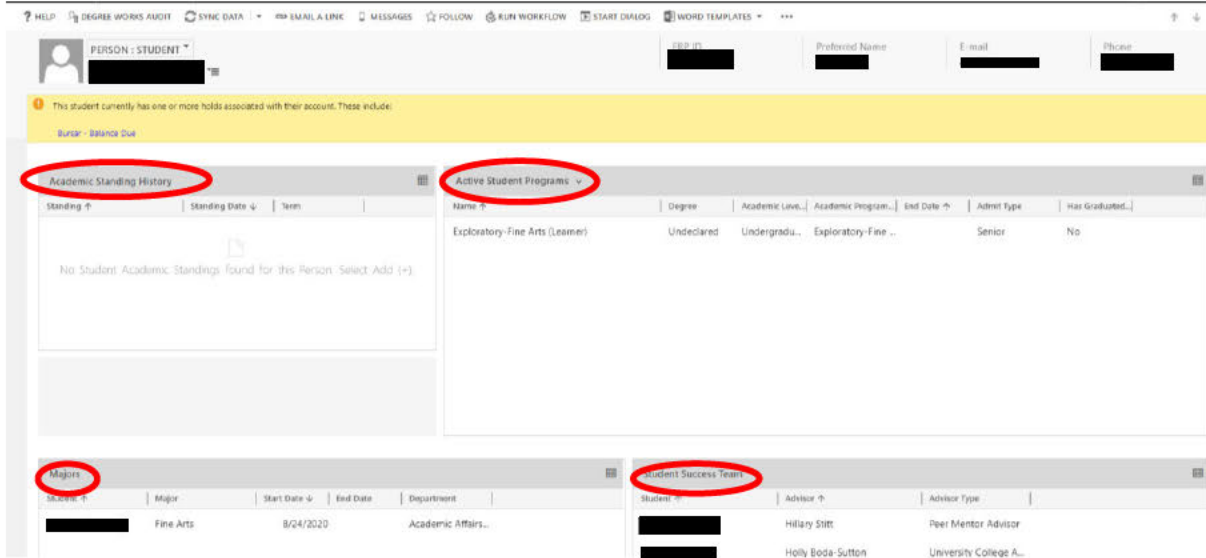
- **Private Notes**

- Notes that you want to remain private.
- You can share notes with other users in the platform by selecting the note you want to share, click **More Commands (...)**, selecting share and adding the user you want.



- **Academic Information**

- Academic Standing History
- Active Student Programs and Majors
- Student Success Team
 - Students are assigned a variety of “advisors” including their primary major advisor, ADean for their college, and Peer Mentor



Details

This section provides information related to this student:

- **Personal information and Student Status**
- **Current Address and Prior academic history**
- **Communication preferences and Financial aid information**

