

Advisor Toolbox User Guide

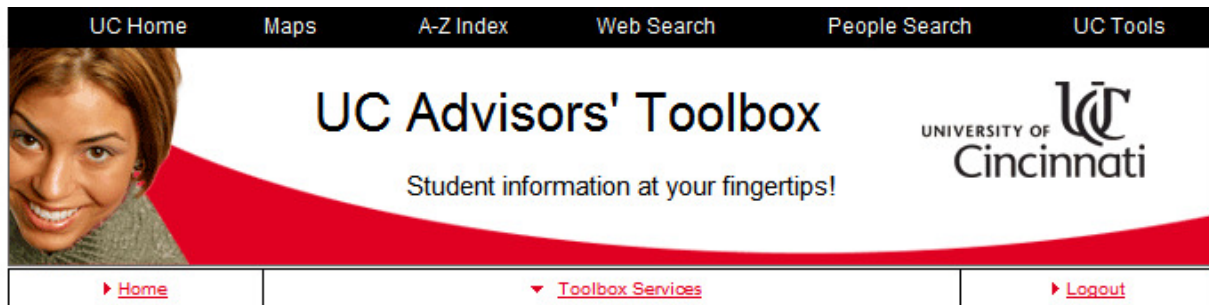
Office of the University Registrar

Registrar.info@uc.edu

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Welcome to the Advisor Toolbox

Advisor Toolbox is a web tool designed to make frequently used student information conveniently available to a wide range of authorized faculty, staff and administrators to perform academic advising or related work. This guide can assist you to best utilize this self-service tool.



Welcome

Users of the Advisor Toolbox are expected to... which protects the privacy of student education... the Department of Education. For more information...

Student Summary	Grade Report	Test Scores
UC Class Rank	Academic Program	Student Schedule
Advisor(s)	Service Block	Credit Evaluation
H.S. Transcripts	College Transcripts	Transfer Portfolio
	Academic Record	
Schedule of Classes	Degree Audit	Early Intervention
Imaging	UC Programs	

...s and Privacy Act of 1974, as Amended, result in the withdrawal of federal funds by [Registrar Web Site.](#)

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University of Cincinnati
Cincinnati, OH 45221-0060

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Advisor Toolbox Overview

Advisor Toolbox is a web tool designed to make frequently used student information conveniently available to a wide range of authorized faculty, staff and administrators to perform academic advising or related work. The following tips can assist you to best utilize this self-service tool:

Important note regarding protecting student information and education records

- **Family Educational Rights and Privacy Act (FERPA)**
Advisor Toolbox users are required to comply with the Family Educational Rights and Privacy Act of 1974, as Amended (FERPA), the federal law that protects the privacy of student education records. For more information, see the “FERPA Reference Sheet for Faculty” available from the [UC Registrar’s Office Web Site](#).
- **Appropriate use of the Toolbox by those with a “legitimate educational interest”**
Student education records accessible through the advisor toolbox are protected by FERPA from both inappropriate access and release. Under FERPA, a university official (including faculty) may gain access to student education records *only* if that individual has a “legitimate educational interest” in that information; that is to say, the individual needs the education record(s) to discharge his or her official UC responsibilities. Advisor Toolbox therefore should be used by UC personnel only when performing individual advising work for a student. For example, accessing the education record of a student who is enrolled in the advisor’s class but who is not also the instructor's advisee would not fall under “legitimate educational interest” and so would not be FERPA compliant. An advising relationship that meets the requirements of legitimate educational interest can be defined formally, when a student is assigned to an advisor by the department or dean's office or informally, when a student from outside a department or college needs advising that requires access to the student's education record.

Using the Toolbox

- Permission to access to the toolbox is granted by the college/department and the Registrar's Office using the Request for UniverSIS Functions form located here: http://www.uc.edu/registrar/tech_services.html. Note: current UniverSIS users, and non-UniverSIS users requesting access only to the Toolbox, should complete only a [Request for UniverSIS Functions](#) specifying a request for the function Advisor-Toolbox. Additional access to UniverSIS functions via the mainframe also requires a [Mainframe Request Form](#). For more information about the process to request access, send a message to: registrar.info@uc.edu
- Upon accessing the toolbox, you will be asked to authenticate your identity using your UC Central Login Service (CLS) username and password. More information about CLS is available: <https://www.uc.edu/UCAuthenticate/Help.aspx>

If you receive an error upon attempting login:

- If you do not know your CLS username or password, contact the UCit help desk <http://ucit.uc.edu/helpdesk> or 513-556-HELP (4357).
- If your CLS Login is OK but you are not permitted access to the Toolbox, you can confirm that you have been granted access with the Registrar's Office by sending a message to registrar.info@uc.edu



Toolbox Basic Instructions

- Point your web browser to: <https://www.uc.edu/advisortoolbox>. Your browser should have javascript and cookies enabled which is usually the default setting.
- After logging in, to connect to a Toolbox service, hover over the Toolbox Services link and then click on a service menu option. Note: a good starting place is Student Summary.
- To access a student record, enter the student UCID (i.e. M00456789). Currently searching by student name is not available.
- After 30 minutes of non-use your login session will time out and it will be necessary to log in again
- To log out, click the logout button

For more information about student information available in UniverSIS via the Advisor Toolbox, contact a data owner listed below:

Data owner	Toolbox Function	Contact Information
Linda Arnest, Associate Director, Office of Admissions	Credit Evaluation Report	556-0811 linda.arnest@uc.edu
Wendy Lambing, Director of Student Records, Office of the University Registrar	Student Summary, Grade Report, Student Academic Program, UC Class Rank, Academic Record	556-9924 wendy.lambing@uc.edu
Connie Boyce, Assistant Director Business Affairs, Office of the Bursar	Service Block	556-3431 connie.boyce@uc.edu
Jon Mays, Director, Office of Admissions	HS Transcript, Test Scores (ACT, SAT)	556-1098 jon.mays@uc.edu
Karen Franz, Assistant Director, Office of Admissions	Test Scores (AP, CLEP), College Transcripts, Transfer Portfolio	556-1068 karen.franz@uc.edu
Tara Stopfel, Assistant Dean, McMicken College of Arts and Sciences	Advisor assignment, Link to UC Programs Database	556-6537 tara.stopfel@uc.edu
Ned Donnelly, Associate Director, Office of the Registrar	Link to Early Intervention	556-5890 Ned.donnelly@uc.edu
Sarah Leggesse, Assistant Director, Office of Admissions/Orientation	Placement Test Scores (MPT, ENPT)	556-3874 sara.leggesse@uc.edu
Gail Fredensborg, Associate Registrar, Office of the Registrar	Student Schedule	556-6502 gail.fredensborg@uc.edu
Fran Meyer, Senior Associate Registrar, Office of the Registrar	Toolbox Access Permission Process	556-5194 frances.meyer@uc.edu
Sandy Williams, Program Coordinator, Office of Admissions	Link to Web Degree Audit	556-1100 sandy.m.williams@uc.edu

For more information about the Advisor Toolbox, visit:

http://www.uc.edu/registrar/Advisor_Toolbox.html

For more information on UC/21 visit: www.uc.edu/uc21



Toolbox Service (area)	Table	Student Information Available	Common data/notes	External Links
1. Student Summary (Student Records)	Student Summary	UCID, Name, Cell Phone, BOL Email, Begin Term, Gender, Ethnicity, Instant Messenger, FERPA Release code		
	Locator Details	Address Type, Address, Phone	BI Billing CO Coop LO Local PE Permanent PR Parent SA Study Abroad	
	Degree Information	Graduate Term, Acad Program Id, Award Code, Acad Area	Applies only to University of Cincinnati degrees awarded. See also College Transcripts.	
	Enrollment Information	Term, Classification, Credit Level, Load Level, Program Id, Award Area, Dean's List		
2. Grade Report (Student Records)	Term Summary	Term, Program, Academic Area, Credit Level, Enrollment Message, Classification, Fresh Start Effective Term, Fresh Start Msg		Course repeat policy, Satisfactory Academic Progress policy, Early Intervention Admin Login
	Classes	Course Title, Course #, Grade, Credit Hrs, Credit Lvl, QPoints		
	GPA Information	GPA Type, Hours Carried, Hours Earned, QPoints, GPA, Progress Hrs, Pass Hrs, AdvStg, Total Hrs	Qtr=Quarter GPA Coll=College GPA Univ=University GPA	
	Special Recognition	Code	DL Dean's List	
3. Test Scores (Admissions)	Test Scores	Code, Low Range, High Range, Score, Score Code, Test Date, Recd Date	See also Credit Evaluation Report	Qualifying Math Placement Scores, English Placement, Language Placement, Advanced Placement (AP), Credit by College Level Examination Program (CLEP)
	Component Scores	Code, Low Range, High Range, Score, Score Code		



Toolbox Service (area)	Table	Student Information Available	Common data/notes	External Links
	Sub Component Scores	Code, Low Range, High Range, Score, Score Code		
4. UC Class Rank (Student Records)	Class Rank Summary	Term, University GPA, Ranked Date, Academic Area Code, Program Area, Student Classification, Class Rank, % Top		
5. Academic Program (College Office, Student Records)	Program	Program Id, Begin Term, End Term, Status Code, Catalog Term, Expected Completion Date	Includes Honors Scholar, Cincinnatus Level, Academic Program Status (i.e. Change, Conversion, Graduated)	UC Majors and Program Listings
	Program Details	Award Conferred Date, Graduation Appl Date, Graduation Appl Term, Certification Status Date, Certification Status, Special Recognitions		
6. Student Schedule (Student Records)	Schedule Summary	Term, Term Description, Program Location, Academic Program Id, Academic Area Code, Credit Level, Student Classification, Number Of Enrolled Classes, Total Credit Hours		Campus maps, Degree Audit, Schedule of Classes
	Class Details	Instruction Method, Grade Type, Site		
7. Advisor assignment (College Office)	Advisors	Code, Access Number, Name	Used with UC People Search	UC Directory Services
8. Service Block (Collections)	Blocks	Block Type, Reason/phone #, Dept Code, Effective Term, Effective Date	TG Transcript/Grades RG Registration FA Financial Aid	
9. Credit Evaluation Report (Credit Evaluation Center)	Credit Evaluation Report	Date Taken, External Course, Award Hours, UC Equivalent, sorted by institution	Provides Sub totals by institution, see also College Transcripts, test scores (AP)	



Toolbox Service (area)	Table	Student Information Available	Common data/notes	External Links
10. H.S. Transcripts (Admissions)	H.S. Transcripts Summary	CEEB Code, School Name, Transcript Received, Final, Transcript, GPA, GPA Basis, GPA Weighted, Scaled GPA, Scaled GPA Weighted , Scaled, GPA Basis, Alternate GPA, HS Expected Graduation Date, HS, Graduation Date, Rank In Class, Class Size, Alternate Rank In Class, Approx Class Rank, Weighted Class Rank, Unweighted Class Rank	To view multiple transcripts, click Submit again or enter "N" (next)	
	Subject Summary	Source, Subject, Lowest Grade, Units Completed		
11. College Transcripts (Admissions)	College Transcripts - summary	CEEB Code, School Name, Transcript Received (Y/N), Final Transcript (Y/N)	To view multiple transcripts, click Submit again or enter "N" (next); See also Credit Evaluation Report	
	Attendance	Begin Date, End Date, Exit Reason		
	Award (i.e. A.A.S., B.S.) Details	Award Details, Expected Award Date, Honors Level, Credit Hour Unit, GPA Weighted, Verified Nat User, Post On Transcript, Subject Area, Credit Level , Class Size, Rank In Class, Credit, Hours Attempted, Most Recent Term GPA, Credit Hours For GPA		
12. Transfer Portfolio (Credit Evaluation Center)	External Courses with UC Equivalents	CEEB, Ext Course Id, Ext Course Title, UC Course Id, UC Course Title, Award, Pending/Posted	Pending indicates that either a student has not registered or all classes have not been evaluated. Under Review indicates that an equivalency	<u>More about Credit Transfer</u>



Toolbox Service (area)	Table	Student Information Available	Common data/notes	External Links
			has not been found by a college or department.	
	Schools	CEEB, School Name, School Std Credit Total, School Award Hrs Total		
13. Academic Record	Classes	Term, Course, Section, Level, Hrs, Grade Type, Grade, Title, Repeated (Y/N)		<u>Course repeat policy</u> <u>Satisfactory Academic Progress policy</u>

Navigation Menu External Links:

[Schedule of Classes](http://www.onestop.uc.edu) – link to www.onestop.uc.edu

[Degree Audit](#) – link to landing page for web advisor degree audit

[Early Intervention](#) – link to login for administrator/advisor user interface

[Imaging](#) – link to login for document imaging

[UC Programs](#) – link to UC programs (majors, minor, etc.) database