

Loyola University Maryland

Student Planning for Advisors

Last Updated 9/21/2023

Family Educational Rights and Privacy Act (FERPA) – also known as Buckley Amendment It is Our Responsibility

Loyola University Maryland has a commitment to protect the confidentiality of student records. The University makes every effort to release information only to those individuals who have established a legitimate educational need for the information. The Family Educational Rights and Privacy Act (FERPA) affords students certain rights with respect to their education records. These rights include:

The right to consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that FERPA authorizes disclosure without consent.

One exception which permits disclosure without consent is disclosure to school officials with legitimate educational interests. A school official is a person employed by the University in an administrative, supervisory, academic or research, among other support staff or university positions.

FERPA violations could result in Loyola losing the privilege of awarding federal financial aid to our students.

It is Your Responsibility

- As faculty or staff, you have a legal responsibility under FERPA to protect the confidentiality of student educational records.
- You have access to student information only for legitimate use in the completion of your responsibilities as a University employee. Need-to-know is the basic principle.
- Your access to student information is based on your role as a University faculty or staff member. You may only view students who you have a legitimate educational interest in assisting.
- You may not release lists or files with student information to any third party outside your college or department unit.
- Notes are accessible to current and future advisors and to the advisee. Notes are considered discoverable when records are subpoenaed.
- Apart from non-suppressed directory information, student educational records are considered private and may not be released without the written consent of the student.
- For more information, go to the current catalogues here: <https://www.loyola.edu/department/records/catalogues> and advance search on Buckley Amendment (select "Find whole word or phrase only") or [here](#) for FERPA Overview.

Accessing Student Planning and Permission to Register Process

1. Login into **Inside Loyola**
With your Loyola username and password



Path to Advising is to select:

- Loyola Self-Service

Teaching, Learning, Working



2. Select **Advising** from the Self-Service Menu

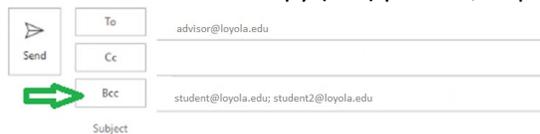


If you are a current faculty member with at least one advisee and are unable to access this link, contact the Records Office.

3. Email All Advisees
Select the **Email All My Advisees** icon from the Advising Overview screen



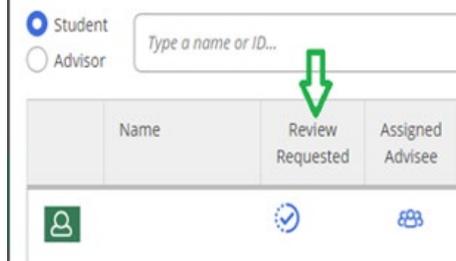
This will open a new email message in your default email client, with all your advisees in the blind copy (Bcc) portion, to protect your advisee's privacy.



To receive a copy of your email, enter your email address in the "To", complete your email and select send.

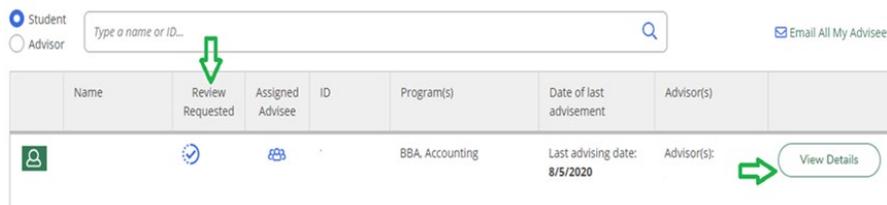
If you need assistance making outlook your default email, please contact the Help Center at ots@loyola.edu or 410-617-5555.

- From the **Advising Daily Work** screen
Determine if advisees have requested a review – there will be a check mark next to their name.



FYI: Students who ask for a review will be placed at the top of your list of those that have not yet asked.

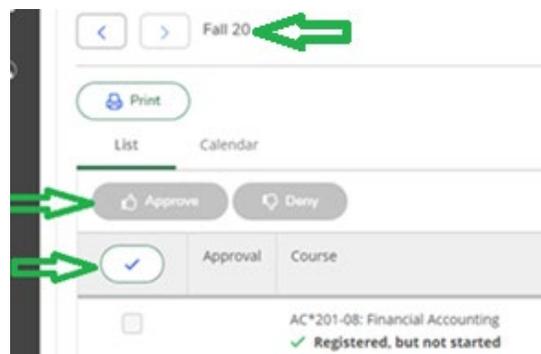
- To review an advisee's request, click on **View Details** to the right of the advisee's name



FYI: The 'Last advising date' is the last time the student was advised. If the student was advised for the upcoming registration term, the date will be more recent. The older the date, the more likely the date refers to a prior registration term.

- Review the courses the student added to their plan and click on Approve or Deny. You may have to click on the greater than symbol (>) to move to the semester for which the student is requesting the review.

Selecting 'deny' will not prevent students from registering for courses if you give the students permission to register.



7. Review notes from student in the **View Note History** section. Compose a note to the student if desired and select **Save Note**.

The screenshot shows a navigation bar with tabs for 'Course Plan', 'Timeline', 'Progress', 'Course Catalog', and 'Notes'. Below the tabs is a 'Compose a Note' section with a text input field and a green 'Save Note' button. Below that is a 'View Note History' section containing two entries: 'Your plan has been reviewed and approved. on 5/29/2020 at 3:34 PM' and 'Please review my registration plan. on 9/29/2020 at 3:27 PM'.

8. Select **Review Complete** to document your approval or denial of course selections. Select archive to store communications / plans.

The screenshot shows a 'UG Permit to Register for Spring 2022 Only' section. Below the title is 'Last advised on 3/16/2021'. A green arrow points to a green 'Review Complete' button. Below this button is 'Course Plan last reviewed on 3/11/2021'. A notification box shows a green checkmark and the text 'The review has been completed.' Below the notification is a blue box with an information icon and the text 'Would you like to archive this course plan?'. Below this are 'Cancel' and 'Archive' buttons. A green arrow points to the 'Archive' button. Below the buttons is a green 'Review Complete' button. Below this is 'Course Plan last reviewed on 9/15/2020 by'.

Without marking the plan with Review Complete, you may not receive future communications from the student.

9. **Select UG Permit to Register for Fall/Spring**, this completes the process and allows the student to register for the selected semester. **Select continue.** **Without these two steps, your advisee cannot register.**
10. **Be sure the date updates** for 'Last advised on'.

The screenshot shows a 'UG Permit to Register for Spring 2022 Only' section. Below the title is 'Last advised on 3/16/2021'. Below this is a dialog box titled 'Complete Advisement?' with a close button (X). The dialog box contains the text 'Are you sure you want to mark this student's advisement complete as of 9/15/2020?'. Below the dialog box are 'Cancel' and 'Continue' buttons.

11. To move to the next advisee, select **Back to Advisees** and repeat the process.

[Daily Work](#) · [Advising](#) · [Advising Overview](#)

Advisee Details

[Back to Advisees](#)

12. **Approving advisee's 6th course request:**

Select the Advisee from the list requesting review.

Select **View Details**.

Student
 Advisor

Type a name or ID...

Email All My Advisees

Name	Review Requested	Assigned Advisee	ID	Program(s)	Date of last advisement	Advisor(s)	
				BBA, Accounting	Last advising date: 8/5/2020	Advisor(s):	

13. Select Notes and Compose a Note

Enter **P6YY/SS** on the first line (for example for Spring 2022 enter **P622/SP**) and select Save Note.

Please see that you now have the example of the needed code when you go to the Notes screen.

If you want to add additional comments simply write a **separate** note and select Save Note.

Compose a Note (Advisors: Spring 2022 6th Course Permission code is P622/SP)

P622SP

Save Note

Save the note

The advisee should be able to register for a 6th course at the appropriate time.

14. Sign out of Self-Service. Full registration instructions are available at

<https://www.loyola.edu/departments/records/faculty>

select Student Planning Guide for Advisors.