Connect to the **IUP VPN** for full access to IUP Advise quick links.

Access IUP Advise: [https://IUPCRM.elluciancrmadvise.com](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 students 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.

**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.
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

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Academic Standing</td>
<td></td>
</tr>
<tr>
<td>Academic Level</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Class Level</td>
<td>Freshman</td>
</tr>
<tr>
<td>Cumulative GPA</td>
<td></td>
</tr>
<tr>
<td>Current Success Score</td>
<td>60</td>
</tr>
<tr>
<td>Current Success Score Record</td>
<td>Freshmen - First Semester --- 12/9/2020</td>
</tr>
<tr>
<td>Scoring Plan</td>
<td>Freshmen - First Semester</td>
</tr>
<tr>
<td>Is Student Athlete</td>
<td>No</td>
</tr>
<tr>
<td>First Term Enrolled</td>
<td>Fall 2020</td>
</tr>
</tbody>
</table>

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.
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*.

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