

# Faculty & Advisor Banner Self-Service Guide

*V7.0*

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## **Section A: Introduction**

### **Lesson: Overview**

#### **User guide goal**

The goal of this user guide is to provide UT-Rio Grande Valley Faculty and Staff step-by-step instructions on how to perform their duties on the Banner Student Information System.

#### **Intended audience**

UT-Rio Grande Valley Faculty and Staff

## **Section B: Set Up**

### **Lesson: Access and Responsibilities**

#### **Your Access**

As a general principle of access, the UTRGV data (regardless of who collects or maintains it) will be shared among those employees whose work can be done more effectively by knowledge of such information. Although UTRGV must protect the security and confidentiality of data, the procedures allowing access to data must not improperly interfere with the efficient conduct on UTRGV business.

Access to the Student Information System (SIS) is based on a user's job role and responsibilities. Web for Students and Web for Faculty and Advisors permit some update capabilities defined in a user's college, department, and instructional assignments.

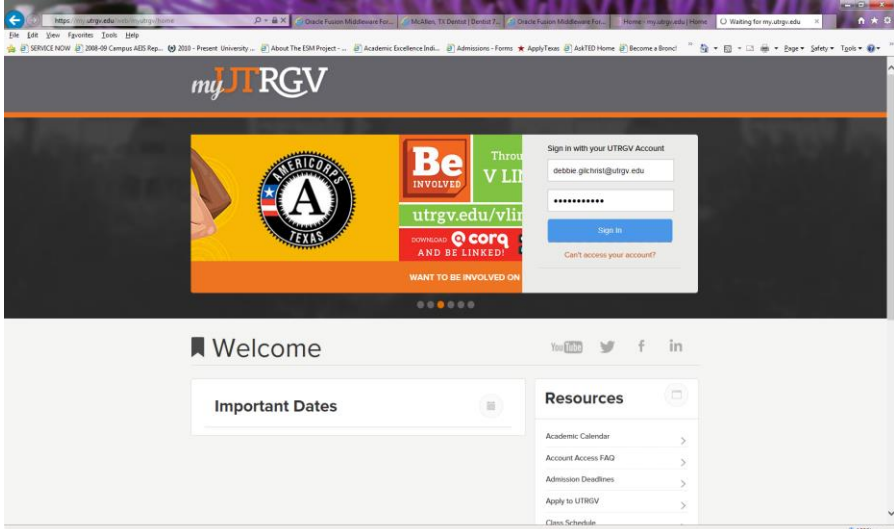
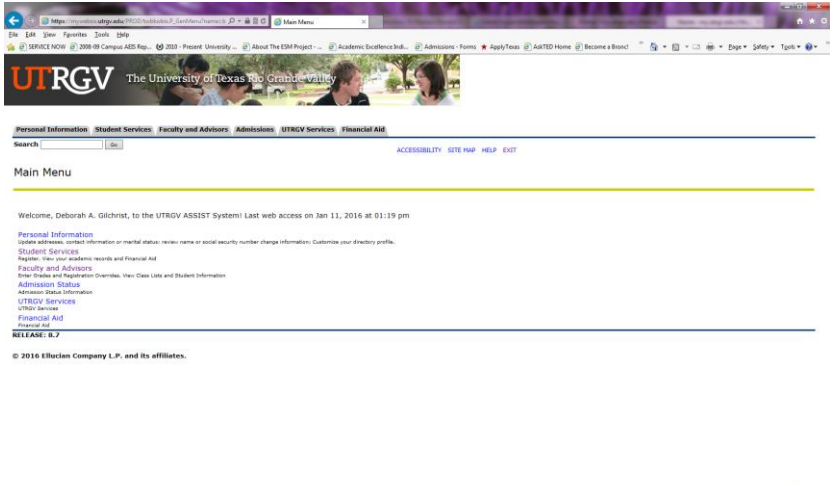
#### **Your Responsibility**

By law, certain data is confidential and may not be released without proper authorization. Users must adhere to any applicable federal and state laws, UT System regulations, and UTRGV policies and procedures concerning storage, retention, use release and destruction of data.

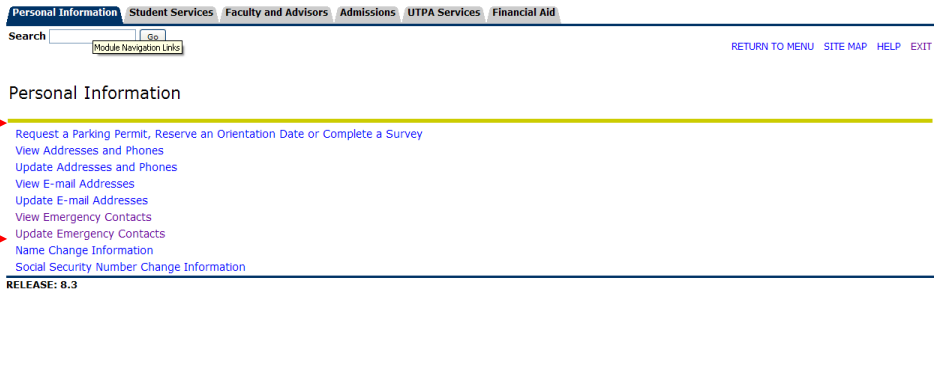
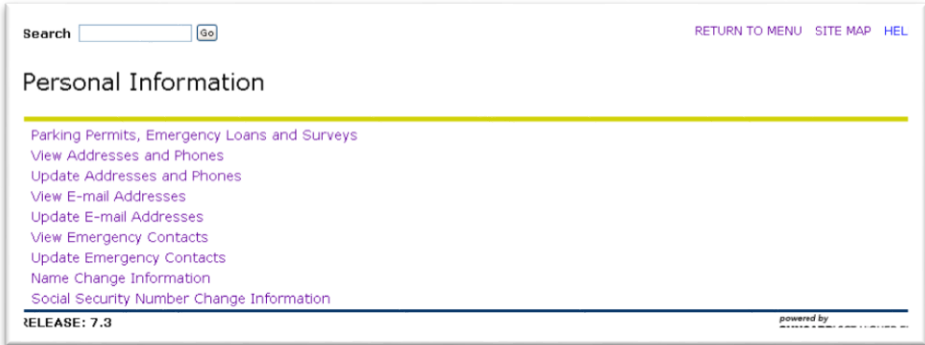
**Generally, student records are protected by the Family Rights and Privacy Act of 1974 (FERPA). Access to these records is restricted to those with an “educational need to know” or those who have the express consent of the student. This protection does not expire when a student leaves the University. In addition, FERPA allows for certain information to be defined as *Directory Information*. This information may be publicly released, unless the student requests nondisclosure through the Office of the Registrar. *Directory Information* is outlined in the current UTRGV graduate and undergraduate catalogs. Additionally, UT System Business process memorandum (BPM 66) protects the use of social security numbers**

**Section C: Day-To-Day Operations**  
**Lesson: Accessing Faculty Self-Service**

To access the Banner Faculty Self-Service as an authenticated user, you must successfully login using your **User ID** and **Password**.

Step	Action
1	Access ASSIST using the following link: <a href="https://my.utrgv.edu">https://my.utrgv.edu</a> This page will appear: 
2	Enter your <b>UTRGV assigned username and password</b> .
3	Select <b>Sign In</b>
4	Select ASSIST from the <b>Applications</b> section.
5	You are IN! 

## Lesson: Accessing Faculty Self-Service – Your Personal Information

Step	Action
1	Log into Self-Service using instructions from Lesson: Accessing Faculty Self-Service
2	Click on the Personal Information tab or link. 
3	Choose an option from the Personal Information Menu 

## Lesson: Updating Addresses and Phone Numbers

Step	Action
1	Log into Self-Service
2	Click on the Personal Information Tab
3	Click on Update Addresses and Phones
4	Select which type of information you'd like to update using the Type of Address down arrow and click Submit

## Update Addresses and Phones - Select Address

**i** Update an existing address by selecting the link next to the corresponding address. Insert a new address by choosing the address type from the list and selecting Submit.

**i** Entering overlapping dates may change the effective dates on existing address records.

Change of address information and USPS forms are available through [this link](#).

### Addresses and Phones

<b>Mailing</b>	<b>Phones</b>
Current: Oct 11, 2007 to (No end date)	Primary: None Provided
5613 El Sauz	Mailing: 956-7813391
Edinburg, Texas 78539	

<b>Permanent</b>	<b>Phones</b>
Current: Oct 11, 2007 to (No end date)	Primary: None Provided
5613 El Sauz	Permanent: 956-7813391
Edinburg, Texas 78539	

Type of Address to Insert: Select

- Select
- Mailing
- Parents
- Permanent

5 Enter the Dates you wish to start and all applicable information on the provided fields and click Submit.

### Update Addresses and Phones - Update/Insert

**i** Required fields on address update or insert are Valid From This Date, Address Line 1, City, State or Province, and ZIP or Postal Code; all other fields are optional. If Nation is entered, only Address Line 1 and City are required. When updating an address you do not need to change the Valid From This Date value.

**Permanent**

Valid From This Date: MM/DD/YYYY

Until This Date: MM/DD/YYYY

Address Line 1:

Address Line 2:

Address Line 3:

City:

State or Province:

ZIP or Postal Code:

County:

Nation:

Area Code:

Phone Number:  OR International Access Code and Phone Number:

Extension:

Unlisted in Web Directory:

Delete this Address:

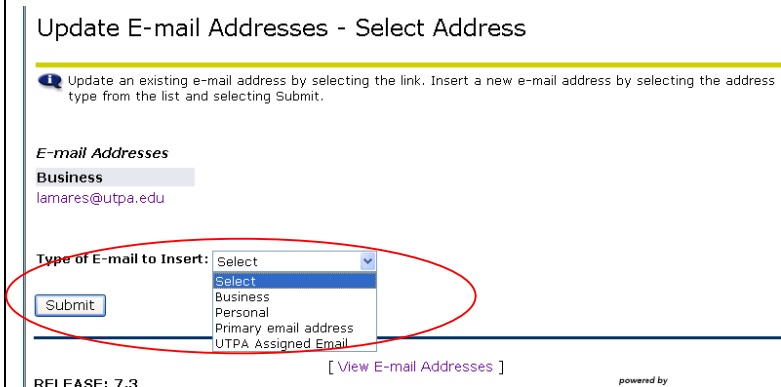
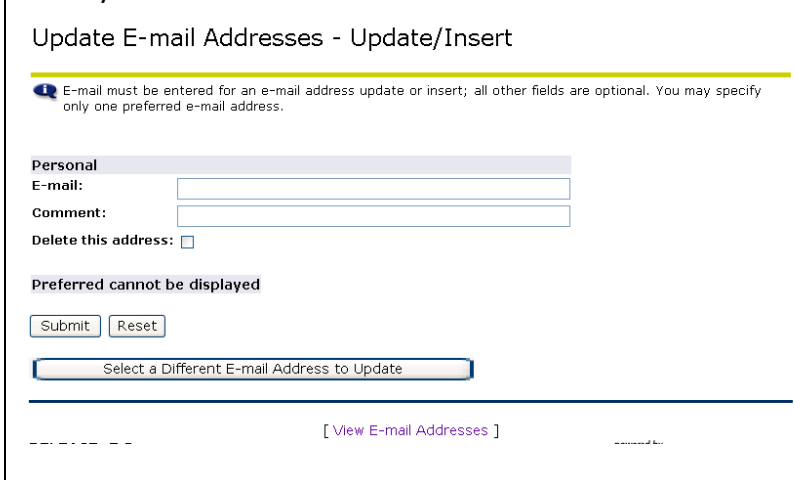
Phone Type	Area Code	Phone Number	Ext.	International Access Code and Phone Number	Unlisted	Delete
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

[ [View Addresses and Phones](#) ]

RELEASE: 7.3 powered by




6 You will be able to view the updated information.

## Lesson: Updating Email Addresses

Step	Action
1	Log into Self-Service
2	Click on the Personal Information Tab
3	Click on Update E-mail Addresses
4	<p>Select which email type you'd like to update using the Type of Email down arrow and click on the Submit button.</p>  <p>Update E-mail Addresses - Select Address</p> <p>Update an existing e-mail address by selecting the link. Insert a new e-mail address by selecting the address type from the list and selecting Submit.</p> <p><i>E-mail Addresses</i></p> <p><b>Business</b></p> <p>lamares@utpa.edu</p> <p>Type of E-mail to Insert: Select</p> <p>Submit</p> <p>[ View E-mail Addresses ]</p> <p>RELEASE: 7.3 powered by</p>
5	<p>Enter your new information and Click the Submit Button.</p>  <p>Update E-mail Addresses - Update/Insert</p> <p>E-mail must be entered for an e-mail address update or insert; all other fields are optional. You may specify only one preferred e-mail address.</p> <p><b>Personal</b></p> <p>E-mail: <input type="text"/></p> <p>Comment: <input type="text"/></p> <p>Delete this address: <input type="checkbox"/></p> <p>Preferred cannot be displayed</p> <p>Submit Reset</p> <p>Select a Different E-mail Address to Update</p> <p>[ View E-mail Addresses ]</p>
6	The Update E-Mail Addresses page will appear with the new information.

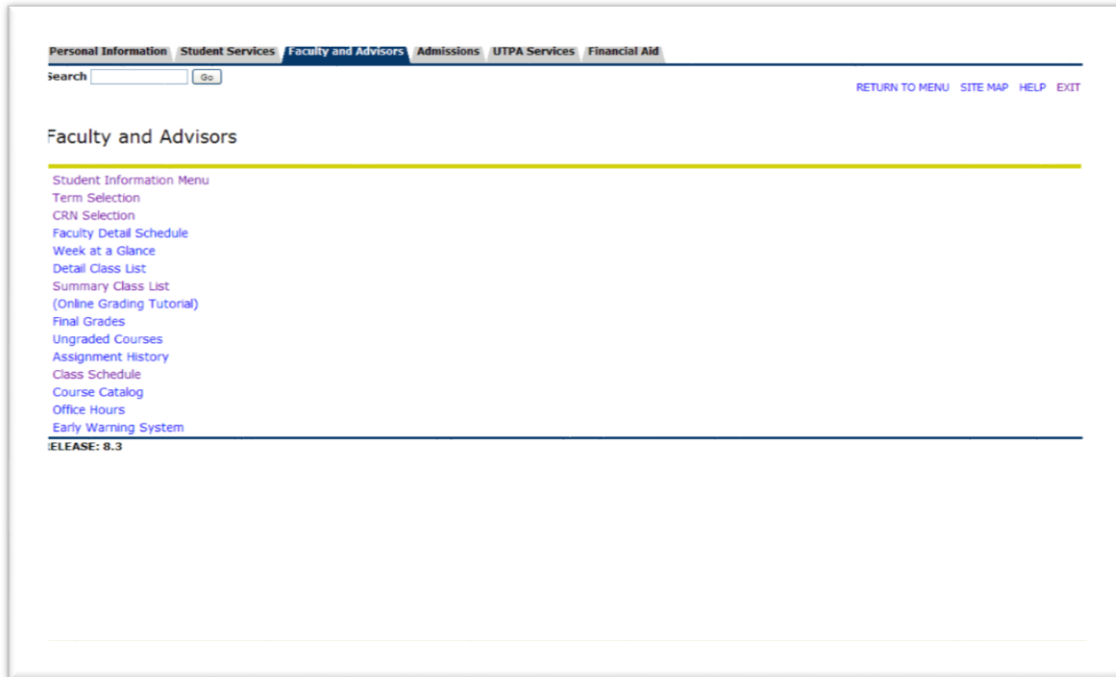
## Lesson: Updating Emergency Contacts

Step	Action
1	Log into Self-Service
2	Click on the Personal Information Tab
3	Click on Update Emergency Contacts
4	Click on New Contact


	<p style="text-align: center;"><b>Update Emergency Contacts</b></p> <hr/> <p> Update a contact by selecting that contact and making the necessary cha</p> <p><i>Emergency Contacts</i></p> <table border="1"> <thead> <tr> <th>Order Name</th> <th>Address and Phone Relationship</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>New Contact</td> </tr> </tbody> </table> <p style="text-align: right;"><a href="#">[ View Emergency Contacts ]</a></p> <p>RELEASE: 7.3</p>	Order Name	Address and Phone Relationship	1	New Contact		
Order Name	Address and Phone Relationship						
1	New Contact						
5	<p style="text-align: center;"><b>Enter information on the Update page then click on Submit Changes</b></p> <p style="text-align: center;"><b>Update Emergency Contacts</b></p> <hr/> <p> Enter a new emergency contact. When finished, Submit Changes.</p> <p>Remove Contact: <input type="checkbox"/></p> <p>Order: <input type="text" value="1"/></p> <p>Relationship: <input type="text" value="Not Applicable"/></p> <p>First Name: <input type="text"/></p> <p>Middle Initial: <input type="text"/></p> <p>Last Name: <input type="text"/></p> <p>Address Line 1: <input type="text"/></p> <p>Address Line 2: <input type="text"/></p> <p>Address Line 3: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State or Province: <input type="text" value="Not Applicable"/></p> <p>Zip or Postal Code: <input type="text"/></p> <p>Country: <input type="text" value="Not Applicable"/></p> <p>Area Code: <input type="text"/> Phone Number: <input type="text"/> Extension: <input type="text"/></p> <p style="text-align: center;"><input type="button" value="Submit Changes"/> <input type="button" value="Reset"/></p>						
6	<p style="text-align: center;"><b>The Update Emergency Contacts page will appear with your new information.</b></p> <p style="text-align: center;"><b>Update Emergency Contacts</b></p> <hr/> <p> Update a contact by selecting that contact and making the necessary changes.</p> <p><i>Emergency Contacts</i></p> <table border="1"> <thead> <tr> <th>Order Name</th> <th>Address and Phone Relationship</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Testing My Contacts 956 5551234</td> </tr> <tr> <td>2</td> <td>New Contact</td> </tr> </tbody> </table> <p style="text-align: right;"><a href="#">[ View Emergency Contacts ]</a></p>	Order Name	Address and Phone Relationship	1	Testing My Contacts 956 5551234	2	New Contact
Order Name	Address and Phone Relationship						
1	Testing My Contacts 956 5551234						
2	New Contact						



The following is a list of options under the **Faculty and Advisor Tab**.




### Lesson: Viewing Faculty Detail Schedule

Step	Action
1	Log into Self-Service
2	Click the Faculty and Advisor tab
3	Click on Faculty Detail Schedule The Select Term page appears
4	Select the desired term using the drop-down list 
5	Click Submit The Faculty Detail Schedule page appears. Use the scroll bar on the right to view all courses.

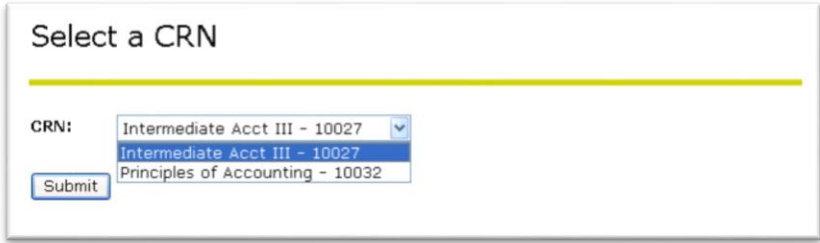
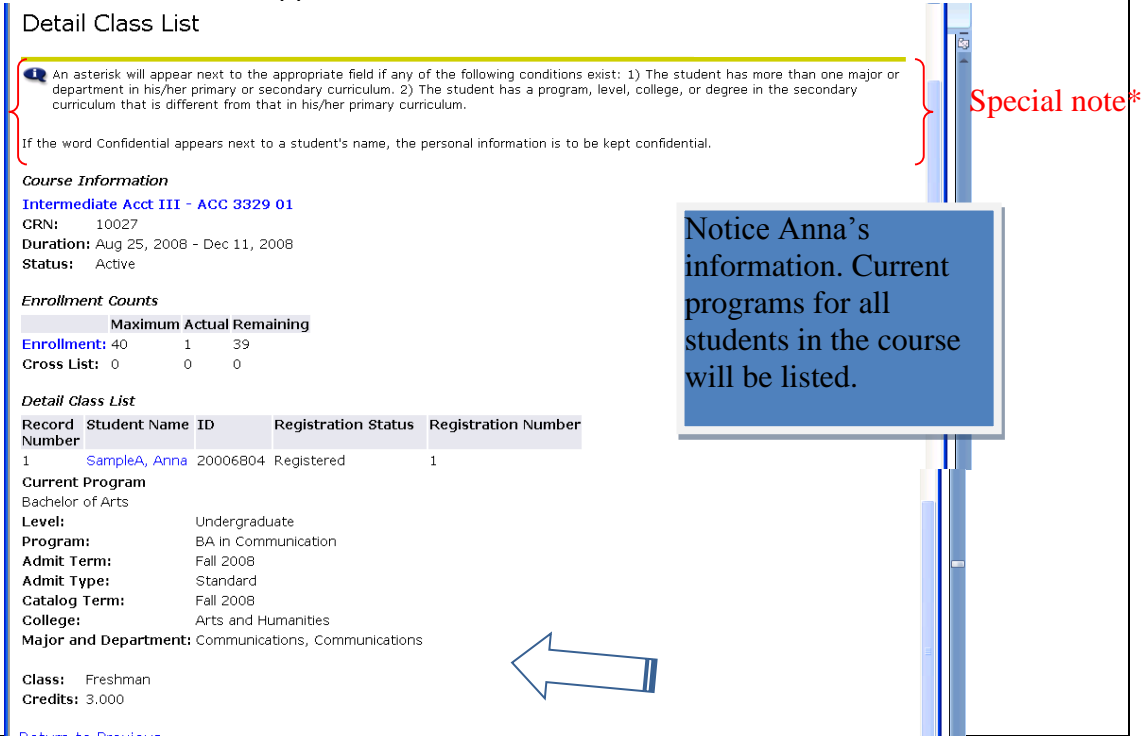
	<div style="text-align: right;">10186233 Linda Arellano Fall 2008 Mar 18, 2008 07:12 pm</div> <h3 style="text-align: center;">Faculty Detail Schedule</h3> <hr style="border: 1px solid yellow;"/> <p><b>Intermediate Acct III - 10027 - ACC 3329 - 01</b></p> <p><b>Status:</b> Active</p> <p><b>Available for Registration:</b> Feb 01, 2008 - Dec 11, 2008</p> <p><b>College:</b> Business Administration</p> <p><b>Department:</b> Accounting and Business Law</p> <p><b>Part of Term:</b> 1</p> <p><b>Course Credits:</b> 3.000</p> <p><b>Course Levels:</b> Undergraduate</p> <p><b>Campus:</b> Main</p> <p><b>Override:</b> No</p> <p><b>Syllabus:</b> <a href="#">Maintain</a></p> <p><b>Rosters:</b> <a href="#">Classlist</a></p> <p><b>Office Hours:</b> <a href="#">Add</a></p> <p><b>Enrollment Counts</b></p> <table border="1"> <thead> <tr> <th></th> <th>Maximum</th> <th>Actual</th> <th>Remaining</th> </tr> </thead> <tbody> <tr> <td><b>Enrollment:</b></td> <td>40</td> <td>0</td> <td>40</td> </tr> <tr> <td><b>Cross List:</b></td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table> <p><b>Scheduled Meeting Times</b></p>		Maximum	Actual	Remaining	<b>Enrollment:</b>	40	0	40	<b>Cross List:</b>	0	0	0
	Maximum	Actual	Remaining										
<b>Enrollment:</b>	40	0	40										
<b>Cross List:</b>	0	0	0										
6	<p>After viewing Faculty Detail Schedule page, click Return to Menu on upper right-hand corner of the screen to return to the Faculty and Advisors Menu</p>												

### Lesson: Week at a Glance

Step	Action
1	Log into Self-Service
2	Click the Faculty and Advisor tab
3	<p>Click on Week at a Glance</p> <p>The Week at a Glance page appears. Use the scroll bar to view complete data</p> 
4	<p>To view the <b>Previous Week</b> or <b>Next Week</b> of a semester, click <b>Previous Week</b> or <b>Next Week</b> (circled in red).</p> <p>The Week at a Glance page appears.</p>
5	<p>To view a Specific Week in a semester, complete the Go To (MM/DD/YYYY) field. ★</p>

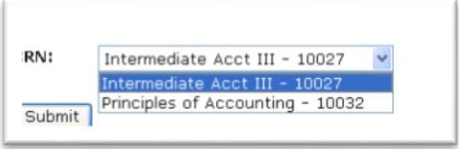
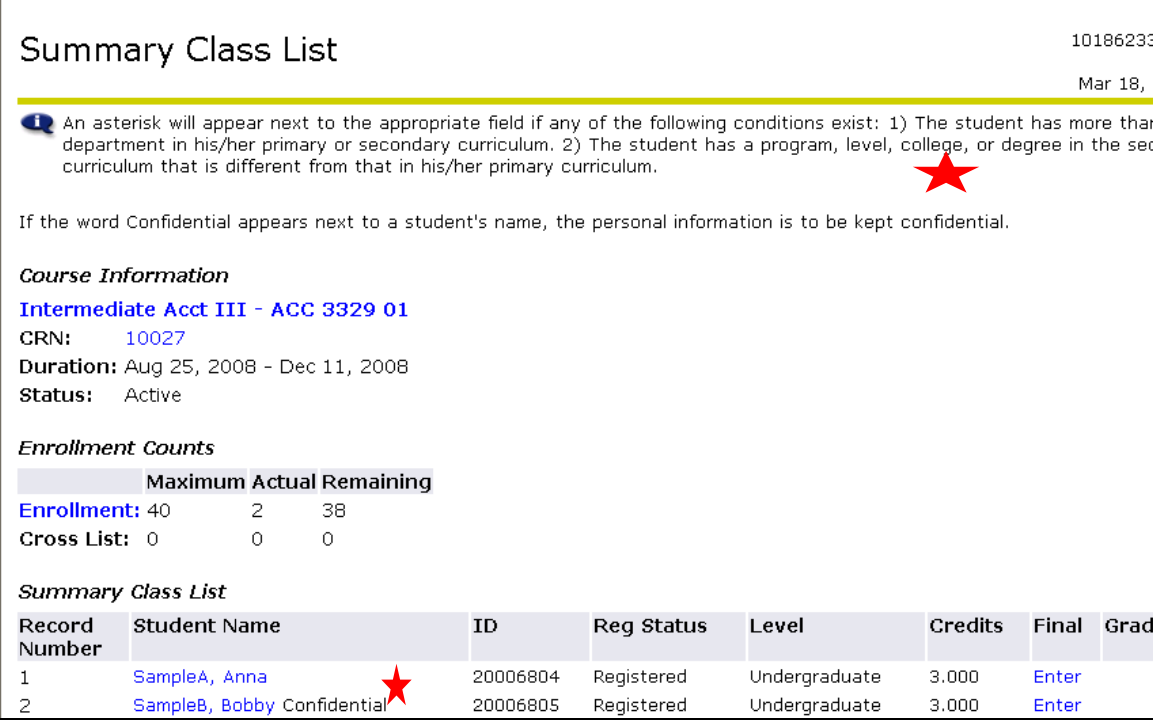

	The Week at a Glance page appears.
6	After viewing the Week at a Glance page, click Return to Menu in the upper-right hand corner of the screen to return to the Faculty and Advisors Menu

### Lesson: Viewing a Detailed Class List

Step	Action
1	Log into Self-Service
2	Click the Faculty and Advisor tab
3	Click on Detail Class List The Select CRN page appears
4	Select the CRN (course) from the drop-down list 
5	Click Submit The Detail Class List appears 
6	After viewing the Detail Class List page, click Return to Menu in the upper-right hand corner of the screen to return to the Faculty and Advisors Menu

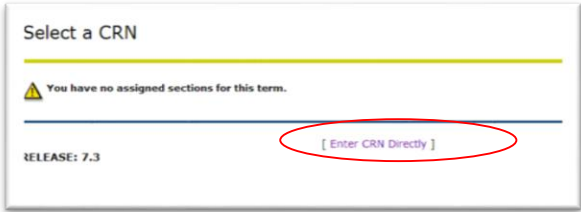
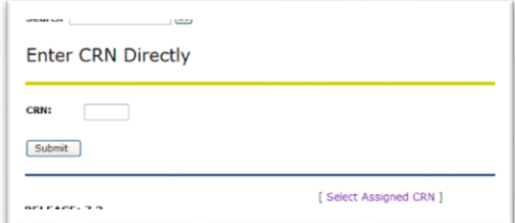
### Lesson: Viewing the Summary Class List and Sending a Class Email

Step	Action
1	Log into Self-Service

2	Click the Faculty and Advisor tab
3	Click on Summary Class List The Select a term page appears
4	Select a CRN using the drop-down list 
5	Select course and click Submit The Summary Class List page appears 
6	To E-mail a student, click the e-mail icon next to their name To E-mail the entire class, click the e-mail icon at the bottom of the page 
7	To view student information, click on the student name. Their address and phone information will appear

	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: right;">10186233 Linda Arellano Mar 18, 2008 08:32 pm</p> <hr/> <p>View Student Addresses and Phones</p> <p>Information for <i>Anna SampleA</i></p> <p><b>Addresses and Phones</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 50%;">Permanent</th> <th style="width: 50%;">Phones</th> </tr> <tr> <td colspan="2"> <b>Current:</b> Mar 18, 2008 - (No end date) Primary: 956-5551234            1 Street            Edinburg, Texas 78540         </td> </tr> </table> <hr/> <p style="font-size: small;">[ <a href="#">Student Information</a>   <a href="#">Student E-mail Address</a>   <a href="#">Class List</a>   <a href="#">Wait List</a>   <a href="#">Mid-Term Grades</a>   <a href="#">Final Grades</a>   <a href="#">Registration Overrides</a> ]</p> </div>	Permanent	Phones	<b>Current:</b> Mar 18, 2008 - (No end date) Primary: 956-5551234 1 Street Edinburg, Texas 78540	
Permanent	Phones				
<b>Current:</b> Mar 18, 2008 - (No end date) Primary: 956-5551234 1 Street Edinburg, Texas 78540					
8	After viewing the Class Summary page, click Return to Menu in the upper-right hand corner of the screen to return to the Faculty and Advisors Menu				

**Lesson: Looking up Courses by CRN**

Step	Action
1	Log into Self-Service
2	Click on Faculty and Advisors tab
3	Click on CRN Selection
4	Select a Term and click Submit
5	Click on Enter CRN Directly <div style="text-align: center; margin-top: 10px;">  </div>
6	Enter the CRN (course reference number) to the course you need and click Submit <div style="text-align: center; margin-top: 10px;">  </div> <p>You will be redirected to the Faculty and Advisor menu</p>
7	Select either Detail Class List or Summary Class list to view selected course

**Lesson: Viewing and Searching the Course Catalog**

The course catalog is a general source guide which only provides course descriptions.

Step	Action
1	Log into Self-Service
2	Click on the Faculty and Advisors tab
3	Click on Course Catalog to view Catalog Term page
4	Select desired term in Search by Term drop down list
5	Click Submit The Course Catalog page appears

6	In the Subject, Title, Level, Schedule Type, College, and Department fields, select or enter the desired search information <b>YOU DO NOT HAVE TO ENTER EVERY FIELD</b>
7	Click Get Courses The Catalog Entries page appears
8	On the Catalog Entries page, click the Course Entry to view course details.
9	After viewing course details, click on Site Map in the upper-right side of screen to return to the Faculty and Advisors Menu

### Lesson: Viewing and Searching the Class Schedule

The Course Schedule is different than the Course Catalog in that the Schedule, as a semester course offering guide, provides information for courses offered.

Step	Action
1	Log into Self-Service
2	Click on the Faculty and Advisors tab
3	Click on Class Schedule to view Class Schedule Search page
4	Select desired term in Search by Term drop down list
5	Click Submit The Class Schedule Search page appears
6	In the Subject, Course Number, Title, Campus, Course Level or Instructor fields, select or enter the desired search information. <b>YOU DO NOT HAVE TO ENTER EVERY FIELD</b>
7	Click Class Search The Class Search Listing page appears
8	On Class Schedule page, click the Section Found to view class details.
9	After viewing class details, click Site Map in the upper right-hand corner of the screen to return to the Faculty and Advisors Menu

### Lesson: Attendance Verification

Attendance verification is very important to both our students and the Institution. Institutions of Higher Education that disburse Title IV Aid (i.e. Pell, Loans, TEACH, Perkins, etc.) must verify attendance. If a student is reported as not attending, we are required to return the disbursed funds to the appropriate program even if those funds were directly disbursed to the student **no later than 30 days after the census date.**

Completing the attendance verification is only the first step in the process. The reports must be reviewed and refunds processed so it is imperative that verification is complete when requested.

Please log in to ASSIST and follow these steps:

1. Click on "Faculty and Advisors"
2. Click on "Attendance Verification"
3. Choose the appropriate term from the menu

4. Choose the class from the menu and click “submit”
5. Check the box for the students who have **NOT** attended ANY class sessions. (For online courses, check the box for students who have not participated in the course.)
6. Click “Submit Attendance Verification”
7. To verify attendance in other courses, click the “Attendance Verification CRN Selection” link at the bottom of the screen.
8. Repeat steps 4-6.

