When you are logged into My Siena, you cannot use the Browsers Back and Forward buttons to navigate from one area to another. You need to use the tabs at the top of the My Siena page or the links directly under the tabs.
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**Introduction**
This site has been developed to assist faculty advisers. It provides options for searching the database for advisees, for registering students in courses, for checking faculty schedules, for providing an override for a student into a class the faculty member is teaching, for entering grades, and for checking class lists.

**Advisee Roster**
This area is used to search for an advisee. There are several different search options available. This section of the document will explain each of these options.

- Log into My Siena.
- Click the Advisee Roster link in the Advising Tools category under My Tools (see illustration below).

The Advisee Roster page will display (see illustration below).

---

**Search for Advisee by Advisee Status**
- Click the Advisor list arrow to search your Advisee List or to search All Advisees.
- Click the Advisee Status list arrow (see illustration above).
- The list of options as described in the table below will appear.
<table>
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<tr>
<th>Advisee Status</th>
<th>Description</th>
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<td>Active Advisees</td>
<td>Students who have been active at the University within the past two years.</td>
</tr>
<tr>
<td>Currently Registered</td>
<td>Students who are registered for the selected semester.</td>
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<tr>
<td>Inactive Advisees</td>
<td>Students who have not been active at the University within the past two years, or who are suspended. Opposite of Active Advisee.</td>
</tr>
<tr>
<td>Need Registration Clearance</td>
<td>All Active Advisees who do not have registration clearance for the selected semester.</td>
</tr>
<tr>
<td>New Students</td>
<td>Students who were admitted within one year of the start of the selected semester.</td>
</tr>
<tr>
<td>Not Yet Registered</td>
<td>All Active Advisees who have not registered for the selected semester.</td>
</tr>
<tr>
<td>All</td>
<td>All students who are registered at the University.</td>
</tr>
</tbody>
</table>

After all the options have been specified, click the **Search** button.

**Search for Advisee by ID**

- In the *Advisee Roster* portlet (see illustration on previous page), click in the **ID** box.
- Input the **ID Number** for the student.
- Click the **Search** button.

**NOTE:** If you put an ID number in on this screen, the search will ignore the Advisee Status, Program, and Home Campus, and Scope of Search that you have selected and just pull that person from the database.

**Search for Advisee by Last Name and/or First Name.**

- In the *Advisee Roster* portlet (see illustration on previous page), input the name of the student.
- You can use the Last Name, the First Name, or a combination of both.
- Click the **Search** button.

**Search for Advisee by Campus, Program, or Advisee Status**

- **Course Program**
  - The program the student is enrolled in.
  - The options are Graduate and Undergraduate.
- **Home Campus**
  - The campus a student is advised at.
  - This is **not necessarily** the campus they are taking courses at.

**Advanced Search**

To apply more criteria to the search, use this option.

- Click the **Advanced Search** button in the *Advisee Roster* window.
- The **Advanced Search** window will display (see illustration on next page).
- To search by Degree, Major, City, State, or Home Campus:
  - Click the appropriate list arrow.
  - Select the desired option from the list.
  - Click the **Search** button.
- To search by Last Name, First Name, or Middle Name:
  - Select one of the options in the list box next to the name you are searching by. These options are:
    - **Contains** – When this option is selected, the database will be searched for any name that contains the specified text.
    - **Exact Match** – This option means that the search will look for the name in the database that matches the text exactly.
**Begins With** – With this option, the program would list any names in the database that begin with the specified text.

- Input the name into the textbox.
- Click the **Search** button.

Use the **Name Search Options** to specify additional conditions for the search.

- **Use Phonetic Match** – When this option is selected, the database will be searched for any name that sounds the way the name is spelled.
- **Use Primary Name Source** – This option is used to search the database for the primary name that is listed in the database.
- **Use Alternate Name Source** – Some students have an alternate name, one they have used previously. This option will search the database for that name if it is used in the search criteria.

**Quick Reference Course Search**

This area is used to quickly search courses by term, program, and campus.

- Click on the **Quick Reference Course Search** link to display a popup window that contains a list of all courses at a particular location.
- The **Quick Reference** page will display in a new window (see illustration below).
In the **Term** list, select the term which is to be searched, such as Fall 2015.

Select either **Undergraduate** or **Graduate** from the **Program** list.

In the **Campus** list, select the appropriate campus.

Click the **Search** button to execute the search.

- A list of classes should appear in the window.
- This list can be referenced while you are working with a student.

**Email Advisees**

This option allows you to send an email to all the advisees that fit specific search criteria.

- Complete a search for your advisees using the information in the **Search for Advisee** document.
- A list of advisees will appear.
- Links to two email options will appear above the list of names (see illustration below).

**E-mail Selected Students**

To send an email to selected advisees, complete the following steps.

- Click the check box beside each name to whom the message is to be sent.
- Click the **E-mail Selected Student(s)** link.
- The names of the selected students will appear in the **Recipients** area.
- In the **Recipients** area, select one of the options; **Public** or **Private** (see illustration on next page).
- Input a **Subject** for the message.
- Input the message for the student(s).
- Scroll down the screen to attach a document to the message.
  - Click the **Browse** button.
  - The **Choose File to Upload** window will display.
  - Select the file that is to be uploaded.
  - Click the **Open** button.
  - The file name and path will appear in the **File** box.
  - Click the **Add** button to insert the attachment.
- Click the **Send** button.
Email All Advisees
To email all the advisees in your list, click this link. When the link is clicked, the Email window will open. The names of your advisees will appear in the Recipients area.

Send a Message to an Individual Advisee
To send a message to an individual advisee, click the Envelope icon below the student’s name. The Email window will open with the advisee’s email address in the Recipients area.

Grant and Revoke Registration Clearance
➊ Click the Advisee Status list arrow.
➋ Select either Currently Registered or Not Registered from the list.
➌ Click the Search button.
❼ Once the advisee list has been generated, click the button for the student under the Registration Clearance column. This is a toggle button that will either grant or remove Registration Clearance.

Advisee Details
To display details about the student such as their classification, address, phone number, home campus, and degree, click the student’s name in the list that was generated during the search.

Academic History
This area shows the student’s education records and examination scores.
➊ Click the student’s name in the advisee list.
➋ The Advisee Details window will display.
➌ Under Tools and Information, in the Academic Records section, click Academic History (see illustration below).
➍ The Academic History page will display.
❼ The Education Record and Examination Scores for the student will appear.
➍ Click the Advisee Roster link at the top of the window to return to the list of advisees.
Click the Advisee Details link to return to the list of tools and information.

- It is **not a good idea** to use the Back button in the Browser window.
- Clicking the Back button may return you to the My Siena Home page.
- You should always use the links at the top of the window as shown in the illustration.

### Course History

- In the Advisee List, click the student’s name for which the grades are to be checked.
- The Advisee Details window will display.
- Under Academic Records, click the Course History link.
- The Course History Detail window will display.
- All the grades for the selected student will display.

### Grade Report

- In the Advisee List, click the student’s name for which the grades are to be checked.
- The Advisee Details window will display.
- Under Academic Records, click the Grade Report link.
- The Official Grade Report window will display (see illustration below).

Click the Term list arrow to select the term for the Grade Report.

To display the Midterm Grades for the student, click the View Midterm Grade Report link.
To return to the **Final Grade Report** window, click the **View Final Grade Report** link.

- This is the same link as you clicked before.
- It is a toggle button that toggles between the two options.

To display and print a copy of the **Grade Report**, click the **Printer Friendly** link in the upper right corner of the window (see illustration).

- The **Print** dialog box will display.
- Select the options in this dialog box and then click **Print**.

**Check for Financial Holds**
This area is used to check for any holds a student may have that might prevent them from registering for a semester.

- In the **Advisee List**, click on the student’s name.
- The **Advisee Details** window will display.
- In the middle of the page a list of holds will appear (see illustration below).

To display additional information about the hold, click the plus (+) sign on the left side of the hold.

- Click the **Advisee Roster** link to return to the search window.

**GPA Projection**
This link is used to estimate what a student’s GPA will be after the current semester is over.

- In the **Advisee List**, click on the student’s name.
- The **Advisee Details** window will display.
- Under **Academic Records**, click the **GPA Projection** link.
- The **GPA Projection** window will display (see illustration below).
In the Program list, select either Graduate or Undergraduate.

In the Course List in the Projected Grade column, select the grade that is projected for the student for each of the courses.

Click the Create Projection button.

The Projected Results will appear below the Create Projection button.

To return to the Advisee Details window or the Advisee Roster window, click the appropriate link at the top of the window.

Unofficial Transcript
This area provides an unofficial list of grades for your advisees.

In the Advisee List, click on the student’s name.

The Advisee Details window will display.

Under Academic Records, click the Unofficial Transcript link.

The Unofficial Transcript window will display (see illustration below).

In the Program list, select either Graduate or Undergraduate.

The top section of the report shows the student’s Transfer, Residential, and Cumulative Grade Point Average.

The next section of the report shows the Transfer Credit for the student.

After the Transfer Credit section, the grades earned by the student at Siena are listed.

Email Forwards Using Email Addresses Page
Use this option to set up a forward for an advisee’s email. This is the same as the Email Forwarding link under the My Tools area on the Home page of My Siena. The only difference is that the advisor can set up the forward for an advisee.

In the Advisee List, click on the student’s name.

The Advisee Details window will display.

Under Advising, click the Email Addresses link (see illustration below).

The Email Maintenance window will display.

The student’s current Email Address will appear at the top of the window.

The current Forwarded Email Address will display in the next line of text.
The Messages shown in the illustration below will appear in the middle of the window.

![Message Illustration]

In the Email Address box, input the new email address (see illustration above).
- To make the new address the default one, click the Make Default check box.
- Click Add to set the new email address as the default.
- To select the Siena Heights Email Address as the default, click the Set as Default link beside that address.
- An asterisk will appear beside the new default address.

Degree Audit
The Degree Audit can be used as an Advising tool, but is not to be used as the Final Degree Evaluation. All final reviews are done by the program chairperson and the registrar. The Degree Audit lists the courses the student has completed towards graduation in each required category.
- In the Advisee List, click on the student’s name.
- The Advisee Details window will display.
- Under Advising, click the Degree Audit link.
- The Degree Audit window will display.
- A list of the courses that match the categories required for a degree will display.

Financial Aid Awards
This feature is only available to selected advisors; those who have permissions to view student financial records.
- In the Advisee List, click on the student’s name.
- The Advisee Details window will display.
- Under Financial Aid, click the Financial Aid Awards link (see illustration below).

![Financial Aid Illustration]

- The Aid Awards List window will appear (see illustration below).
- The default Award Year will be the current academic year.
- To view Awards for previous years, click the Award Year list arrow and select the year.
- This list shows all the awards for the selected student for the specified award year.
- Click either the Advisee Roster or Advisee Details link at the top of the window to exit from this window.
Missing/Received Documents
This area provides a list of financial aid awards that a student has received for the specified year. It will also provide a list of documents that the Financial Aid office has not received for the specified year.

In the Advisee List, click on the student’s name.

The Advisee Details window will display.

Under Financial Aid, click the Missing/Received Documents link.

A list of Financial Aid that the student has received for the year will appear (see illustration below).

A list of any documents that are still needed to process Financial Aid Awards will appear.

Financial Aid Dashboard
This window provides a list of Financial Aid received by the student for a specified semester. It shows the student the steps that need to be taken to apply for and accept this aid.

In the Advisee List, click on the student’s name.

The Advisee Details window will display.

Under Financial Aid, click the Financial Aid Dashboard link.

In the Viewing Award Year list, select the current Academic Year.
A listing of Financial Aid Information for the selected Academic Year will appear.

Add/Drop Courses
This window will allow an advisor to register a student for courses or to drop a student from a course.

- Under Registration, click the Add/Drop Courses link (see illustration below).

The Add/Drop Courses window will display (see illustration below).

- Select the registration term from the Term list.
- Select either Graduate or Undergraduate from the Program list.

Add Courses
- Under Add by Course Code, start inputting the course code for the course that is to be added, such as BAM218.
- A dropdown list of courses that match the code will appear.
- Select the course code and section number for the course.
- Input the section in the appropriate box.
- Click the Add Course(s) button (see illustration on next page).
- The course(s) should appear in the Your Schedule list.

Search for Courses
If you are not sure of the Course Code, you can search for the course by Title. Other search options are also available through the Course Search tab.
- Click the Course Search tab next to the Add by Course Code tab.
- The Course Search window will display (see illustration on next page).
- Input information into the appropriate box for the search.
The Title and Course Code have four options available for the search. These are:

- **Begins with** – The course Title or Course Code must begin with the specified text. For instance, under Course Code you could input EDU.
- **Ends with** – The course Title or Course Code must end with the specified information, such as 421.
- **Exact Match** – The text input into the box must match exactly the Title or Course Code.
- **Contains** – The Title or Course Code information must contain the specified data.

Select the **Term** which is to be searched. The default is the current term.

Select the **Program**. The options are Undergraduate and Graduate.

Click the **Search** button.

Click the **More Search Options** link to apply additional search criteria.

Information about the course will appear in the **Results** window.

Click the **Drop/Add Courses** link to return to the **Add/Drop Courses** window.

Input the **Course Code** into the **Course Code box** to specify the course that is to be added.

**Drop Courses**

- Click the check box next to the course that is to be dropped.
- Click the **Drop Selected Courses** button (see illustration at right).
- The course will be removed from the list.

**NOTE:** Multiple courses may be removed at one time by clicking the check box next to each course before clicking the Drop Selected Courses button.
**Student Schedule**

This option allows the advisor to view the schedule for each advisee.

- In the **Advisee List**, click on the student’s name.
- The **Advisee Details** window will display.
- Under **Registration**, click the **Student Schedule** link.

![Registration]

- The **Schedule Details** window will display (see illustration below).

![Schedule Details]

- The schedule for the selected student will display.
- To change the term for which the schedule is viewed, click the **Term** list arrow.
- Click the **Program** list arrow to select from either **Graduate** or **Undergraduate**.
- Click the **View Your Schedule** button to display the courses.

**Course Overrides**

In this area, faculty can authorize a student to register for a course even if the course is full or if the student does not meet a requisite or has a schedule conflict.

**View Overrides That Have Been Granted**

- Log into **My Siena**.
- Click **Course Overrides** in the **Faculty Tools** category under **My Tools**.

![Faculty Tools]

- Select the **Term** for which the **Override** is to be granted.
- Click the **Course List** link at the bottom of the window (see illustration below).
- The **Course Overrides-Course List** window will display.
Click one of the two option buttons.
- **Courses I Am Teaching** - These are the courses that appear in the schedule that you are authorized to teach.
- **All Courses I Can Authorize** - This will provide a list of courses for which you can grant an override.

Click the course for which the **Override** is to be granted.

Click the **Course List** link at the bottom of the window.

The **Course Overrides-Course List** window will display.

Select the **Term** for which the **Override** is to be granted.

**Override a Course You Teach**

Click the **Courses I Am Teaching** option button.

Click the link for the course for which the **Override** is to be granted.
Click the Add New Authorizations link to add the authorization for the course (see illustration below).

The Course Authorization – Add New Authorizations window will appear (see illustration below).

Input the required information into the proper boxes.

Click the Search button to locate the student.
- Click the Advanced Search button to specify additional criteria for the search.
- The Course Overrides-Advanced Name Search window will appear.
- Select the pertinent to perform the Search.
- Click the Search for Name button to locate the student for whom the override is to be granted.

Click the Select button next to the student’s name to which the override is to be granted.

The Add Authorization Conditionss window will display (see illustration below).

Click the Authorization Condition that pertains to this particular student.
- Capacity – The maximum number of seats for the course have been reached.
- Schedule Conflict – The student has another class at the same time as the one for which the override is being granted.
- Course Requirement – This link is used to override a prerequisite or co-requisite for a course.

Click the Add Authorization(s) button.

Permission will be granted for the student to register for the course.
Override a Course You Do Not Teach

❖ Log into My Siena.
❖ Click Course Overrides in the Faculty Tools category under My Tools.

❖ Select the Term for which the Override is to be granted.
❖ Click the Course List link at the bottom of the window (see illustration below).
The Course Overrides-Course List window will display (see illustration on previous page).

- Click the All Courses I Can Authorize option.
- Click the Program list arrow to select from All, Graduate, or Undergraduate.
- Click the Department list arrow to select a department to search.
  - It is strongly recommended that you select a department.
  - This will narrow the search.
- After all the options have been chosen, click the Search button.
- The rest of the process is the same as for overriding a course that you teach.
- Authorization privileges are granted by the Registrar, and may not be available for everyone.
- To return to the My Siena Main Page, click the Home tab.

Remove Authorization

- Click the link for the course for which the override is to be removed.
- Click the check box next to the name of the student for whom the authorization is to be removed.
- Click the Remove Authorizations button.
- The authorization will be removed and the name of the student will be removed from the list.
- To return to the My Siena Main Page, click the Home tab.

Use Set Options

- Click the Set Options tab in the Course Overrides area.
- The Set Options window will display (see illustration below).

- Under Name Search Options, click one or more of the check boxes.
  - Search Using Phonetic Match – This option will search for a name that sounds like the one that is input. When using the other two options, it is a good idea to uncheck this option.
Search Using Primary Name – This option is used to search for the student using the primary name as it is listed in the CARS database.

Search Using the Alternate Name Types – In CARS, it is possible to input a different name for a student, such as their maiden name. This option will allow the advisor to search by the alternate name.

To indicate the column by which the Authorizations Granted should sort when the Course Authorization Details screen is displayed, click the Sort Column list arrow and select one of the options; Student, Condition, or Reason.

When all the options have been selected, click the Save button.

View Faculty Schedule
This option will allow faculty members to view information about a course they are teaching such as the time, day, dates, room assignment, and the number of students registered for the course.

Click My Courses in the Faculty Tools category under My Tools.

The Course List window will display (see illustration below). This window lists all the courses you are teaching for the semester.

To change the semester for which the courses are listed, click the Term list arrow.

Select the program from the Course Program list. The options are All, Graduate, or Undergraduate.

Click the View My Faculty Schedule link in the upper right corner.

The Course Schedule window will display.

The courses for the specified semester will display along with the days and times of the courses.

Click the View My Course List link to return to the Course List window.

Attended Last
This area should be used to specify when a student last attended a course that you are teaching.

Click the Attended Last link in the Faculty Course Control category under My Tools.

The Set Options window will display (see illustration below).
If necessary, make changes to the Program, Session, and Year. The options will default to the current semester.

Click the Submit Options button.

The Update Attendance window will display (see illustration below).

Click the course for which the Attended Last update is to be entered.

Click the Submit button.

The second screen of Update Attendance will display.

The names of the students in the course will be listed.

Click the check box next to the name if the student has never attended the selected course.

If the student has stopped attending, input the date of last attendance in the appropriate box.

Click the Submit button.

My Courses
In the My Courses area faculty can view a list of courses they are teaching, view the details of the courses, submit their grades, and view a list of the students in the course.

Click My Courses in the Faculty Tools category under My Tools.

The Course Lists window will display (see illustration below).

To change the semester for which the courses are listed, click the Term list arrow.

Select the program from the Program list.

Click the View Courses button.

The courses for the specified semester will display.
Course Details
This area displays all the information about the course, such as meeting date and time, credit hours, and course format.
- Click the list arrow under Go Directly To for the course for which the information is to be displayed.
- Select Course Details from the list.
- The Course Details window will display (see illustration below).

Class Lists
This option will display a list of the students in the course.
- Click the list arrow under Go Directly To for the course for which the information is to be displayed.
- Select Class Lists from the list.
- The Class Lists window will display (see illustration below).
To send a list of the students to Microsoft Excel, click the **Export to Excel** button.

To email students in the course select one of the options.

- **E-Mail Selected Students** – Use this option to email only specified students in the course. Click the check box next to the student’s name before clicking the option.
- **E-mail All Students** – This option can be used to send an email message to all the students in the course. The message can be private or public.

Click the **Faculty Course Control** link (see illustration above) to return to the **Faculty Course Control** window. **DO NOT** use the **Back** button on the **Browser** toolbar.

### Set Options for Class Lists

- Click the **Set Options** button in the upper left corner of the window (see illustration above).
- The **Portal User Options** window will display (see illustration below).

Click the check boxes for any of the desired options.

Click the **Save** button.

**NOTE:** Setting these options will affect the Class Lists portlet on all pages of the portal.

### Grade Entry - My Courses

This area is used to enter the Midterm and Final grades for the selected course.

Click the list arrow under **Go Directly To** for the course for which the information is to be displayed.
Select **Grade Entry** from the list.
The **Update Student Grades** window will display (see illustration below).

![Faculty Course Control - Update Student Grades](image)

- Click the **Default Grade** list arrow to view a list of grades that will appear in all the grade boxes for the students.
- Click the **Set Default Grade** button to insert the grades for the students.
- To set the **Default Last Date of Attendance**:
  - Input a date into the appropriate text box.
  - Click the **Calendar Icon** and select the appropriate date.
- Click **Set Default LDoA** (Last Date of Attendance) button.
  - This date is required if a student receives an “E” or an Incomplete (I) in the course.
  - It is also required if a student quits attending before the end of the semester.
- Scroll down the page and select the grades for each individual student.
- If the student has an **Incomplete** grade, click the **Student’s Name** to fill out the **Faculty Authorization of Incomplete Grade** form.
- If the student grade is an “E”, input the **Date of Last Attendance**.
- Click the **Save** button.

**Grade Entry – Faculty Tools**
This option can be used to enter grades for students. It is also possible to enter grades through the My Courses area. Both processes are the same.
- Click the **Grade Entry** link under the **Faculty Tools** area on the **My Siena Homepage**.
- Click the **View Course List** in the **Grade Entry** window.

![Faculty Tools](image)

- The **Faculty Tools – Grade Entry** window will display (see illustration below).
- Click the link for the course for which grades are to be entered.
- The **Grade Entry – Update Student Grades** window will display.
The Update Student Grades window will display (see illustration below).

Click the Default Grade list arrow to view a list of grades that will appear in all the grade boxes for the students.

Click the Set Default Grade button to insert the grades for the students.

To set the Default Last Date of Attendance:
- Input a date into the appropriate text box.
- Click the Calendar Icon and select the appropriate date.

Click Set Default LDoA (Last Date of Attendance) button.
- This date is required if a student receives an “E” or an Incomplete (I) in the course.
- It is also required if a student quits attending before the end of the semester.

Scroll down the page and select the grades for each individual student.

If the student has an Incomplete grade, click the Student’s Name to fill out the Faculty Authorization of Incomplete Grade form.

If the student grade is an “E”, input the Date of Last Attendance.

Click the Save button.
Retention Tools
The Retention Tools feature is used to alert the Director of Retention of any issues pertaining to a student. There are two basic tools that are used for this purpose. The first is the Early Alert Message and the second is the Retention Management.

Early Alert Message
This message is sent to the Director of Retention. The director then sends the message to the pertinent people at Siena who may be able to assist the student.

Click the Create an Early Alert Message link under Retention Tools.

The Submit Early Alert window will display (see illustration below).

Fill in the pertinent information for this student.

Click the Submit Early Alert button to send the message to the Director of Retention.
Retention Management
Retention Management keeps a running record of the transaction that took place in an effort to help the student succeed.

❖ Click the Retention Management link under Retention Tools.

❖ The Retention window will display.

❖ To locate a student:
  ★ Input the Student Name or Student ID into the Search box.
  ★ Click the Search button.
❖ Click the Actions tab to view all messages regarding the selected student.
  ★ A window will appear with four different tabs: Early Alerts, Follow-up Assignments, Interventions, and All Actions.
  ★ Click one of the tabs to view more information about all the students in your courses.
❖ Click the Students tab to view a list of all the students in your class(es).
  ★
❖ Click the View All button to view all the messages that are available for the selected student.
❖ Click the Home tab to return to the main My Siena page.