SELF-SERVICE FOR FACULTY AND ADVISORS

Click the links below and jump to a section:

- Advising/Permit to Register
- Course Catalog/Search for Sections
- Class Roster
- Grading
- Faculty Permissions

- Electronic Forms
  - Catalogue Course Update
  - Change of Course Status
  - Change of Grade
  - Class Roster Verification Report
  - Failure Report
  - Incomplete Report
  - Midterm Action Report

- Resources

Revised 9/19/2023
ACCESSING SELF-SERVICE

- Go to inside.loyola.edu
- Login with your Loyola username
  - same as email address (minus @loyola.edu)
  - Get assistance access issues by contacting the Help Center at ots@loyola.edu or 410-617-5555.
- Faculty functions are all under the ‘Teaching, Learning, Working’ area of the portal.
- All directions below assume you are logged into inside.loyola.edu and you click on Loyola Self-Service and enter your username again.
TIPS FOR NAVIGATION AND ASSISTANCE

• Realize that if you remain in a screen, idle, for even a brief time, you may need to refresh your browser or even log out and back into Self-Service.

• For security reasons there are time limits. Log out and log back in or refresh your browser if the system is not acting as you expect.

• Be prepared to re-enter information if the time limit expires and you are unable to access the information you need.

• If a printer is attached to your computer and printing is essential, check your page setup prior to printing.
1. After selecting the Loyola Self-Service option:
2. Select the *Advising* link.

3. Your currently assigned advisees will appear in a list.
4. Other students may be viewed with an educational need to know by searching on name or ID number and clicking on the magnifying glass.
5. Find your advisee and click View Details. Start here for giving permission to register.
1. Your currently assigned advisees will appear in a list.
2. Find your advisee and click View Details to start the permission process.

3. Select an action from the tabs across the top of the page to view other student information.
4. Go to the Records Office web site for full Student Planning Advisor instructions:
   www.loyola.edu/department/records/faculty and click on:
   Student Planning Guide for Undergraduate Advisors
1. After selecting the Loyola Self-Service option:
2. Select the Advising link.
3. Your currently assigned advisees will appear in a list.
4. Select the Email All My Advisees link at the top right of the screen.
5. If Microsoft Outlook is your default email client, this link will open a new email message with all your advisees in the blind copy (Bcc) portion, to protect their privacy.
6. In the ‘To’ portion, place your name/email address to receive a copy of the email. Complete your email and select send.
1. Select the *Email All My Advisees* link at the top right of the screen.

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

3. If the email doesn’t open or send properly, contact the Loyola Help Center if you need assistance setting the default email on your device. You may be able to copy and paste the email addresses into the email client you use to email Loyola advisees.

4. It is difficult for us to advise you because of the many devices and email clients that are available for use.
PERMIT TO REGISTER

UNDERGRADUATE ADVISEES ONLY; FALL AND SPRING REGISTRATIONS ONLY

• After selecting the Loyola Self-Service option:
  • Select the Advising link.

• Only undergraduates are given permission to register, and only for Fall/Spring terms.

• Please do not give students permission to register for summer – it could inadvertently give them permission to register for fall.

• Go to the Records Office web site for full Student Planning Advisor instructions:
  • [www.loyola.edu/department/records/faculty](http://www.loyola.edu/department/records/faculty) and click on:
  Student Planning Guide for Undergraduate Advisors
PERMIT TO REGISTER FOR SIXTH COURSE
UNDERGRADUATE ADVISEES ONLY; FALL AND SPRING REGISTRATIONS ONLY

• After selecting the Loyola Self-Service option:
• Select the Advising link.

• Only undergraduates are given 6th course permissions.
• Faculty advisors assign 6th course permissions for the fall and spring terms only.
• Select View Details of your advisee.
• The 6th course permission code is assigned in the NOTES section of each advisee.
• In the Compose a Note box, enter the special code in this format: P6Term –
• For example: for Spring 2024 6th course permission, enter code: P624/SP
• Do not enter any other words/data, and remember to click SAVE NOTE
• You can go back in and add notes separately but not together with this code.
• Go to the Records Office web site for full Student Planning Advisor instructions:
  • www.loyola.edu/department/records/faculty and click on:
  Student Planning Guide for Undergraduate Advisors
1. After selecting the Loyola Self-Service option:

2. Select Course Catalog.

3. Choose the subject or advanced search option, the default is Advanced Search – the instructions below are for Advanced Search.

4. Under Term, select the term desired. Only 3 terms are searchable. Talk to your department Administrative Assistant/DPO for a report if you need other terms. They can contact the Records Office if they need assistance.

5. Select subjects and course numbers as desired from the drop-downs.

6. For your teaching schedule, go to Advanced Search, select the Term. If you know the Subject(s) code of the sections you are teaching, select that as well for a faster result.

7. Click Search at the bottom.

8. Under Instructors in the Filter Results on the left menu bar, click the box with your name and view results. Contact your department chair if information is inaccurate and needs to be updated or the Records Office to correct errors.
1. On the left side, under **Filter Results**, narrow your search with other options if desired, including Open Sections Only.

2. Narrow your search using **Course Types** for diversity, interdisciplinary majors and minors, summer sessions, and Service-Learning courses. Select **Search**.

3. The screen shows information related to your searched courses. If you hover over the information icon under ‘Availability’, it shows the order of the meaning of the numbers presented: available slots/taken slots/course capacity/waitlisted – we are currently not using the waitlisting feature.

4. Select **Section Name** (course number) hyperlink for more course information.

5. The up and down symbols in the header allow you to resort in ascending or descending order for that column heading.

6. If you are also a student, you will see ‘Add’ to the left of all the courses. The system allows you to pick courses you may want to take from the list.

7. Navigate out of this feature by clicking on the home icon or use the left side panel for more selections.
1. After selecting the Loyola Self-Service option:
2. Select the Faculty link.

3. Here is information about each course section for the viewable terms including days/times, location(s) and instructional methods.
4. Select the course section and title hyperlink.
5. Select Roster.
6. This screen also includes term, location, days/times, dates, and seats available/seats taken/seat capacity. To see the credit value of the course, select Grading, explained on another slide.
7. View roster, including:
   - Student name
   - ID
   - Class Level – see slide 13 for additional information
   - Pass/Audit information
   - Loyola email address
8. If your course is cross-listed, it will show which students are in the other cross-listed section when you open one of the rosters. Combined information shows on the roster tab and the grading tabs.

Back to beginning
CLASS ROSTER – CLASS LEVEL

• Class level appears in Self-Service based on credits completed, not based on class year:

  Freshman First-Year
  Freshman
  Sophomore
  Junior

• A Freshman First-Year indicates a student who is a first-year student for the current academic year and has less than 30 credits completed.
• A Freshman indicates a student who is not a first-year for the current academic year and has less than 30 credits completed.
• A Sophomore First-Year indicates a student who is a first-year student for the current academic year and has 30 or more completed credits, usually meaning the student brought in Advanced Placement or other credits.
• Students are defined in Loyola’s system in this way:
  • Freshmen have less than 30 completed credits
  • Sophomores have greater than or equal to 30 and less than 60 completed credits
  • Juniors have greater than or equal to 60 and less than 90 completed credits
  • Seniors have greater than or equal to 90 completed credits
CLASS ROSTER OPTIONS

• Hover over the student’s name and select View Full Profile

• Provides additional information, including:
  • Student’s Loyola and Personal email (if the student has one)
  • Phone number(s)
  • Academic program
  • Anticipated graduation date
  • Major
  • Minor, if applicable
  • Advisor name and email.

• Shows student registration status of Pass/Fail (P) or Audit (A)
  • Otherwise assume students shown on this screen are registered for regular credit.
  • Students who have officially dropped do not show on your roster.

• Other options:
  • Print the roster – you may have to tweak your printer device
  • Email all students (see next slide for details)
  • Export – allows you to export a csv file and put into Excel or other applications.
CLASS ROSTER – LARGER PHOTO PRINTING

Windows PC

To print larger copy of your class roster

1. Go to Loyola Self-Service and sign in, select Faculty then click on the course section you want to print.
2. Once the roster displays, using the snipping tool, snip about 4 or 5 students with their names and photos.
3. Open a Word document, select blank document and click on paste.
4. Click on the snippet image to select it then drag one of the corners to enlarge. Repeat as needed to get a complete roster.
5. Print the Word document.

Mac

1. Same as step one above
2. Together press and hold Shift, Command and 4
3. Drag the crosshair to select 4 or 5 students with their names and photos.
4. Same as steps four and five above.

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On the first screen after choosing a class and going to the Roster tab, above the student names to the right, select the link that says *Email All.*

If Microsoft Outlook is your default email client, this link will open a new email message with all your students in the blind copy (Bcc) portion.

Put your email address in ‘To’.

The student email addresses will all be in Bcc, the blind copy area, which is appropriate to maintain student privacy.

You have the choice of emailing all the students or selecting a subset to email by removing student emails. After choosing the appropriate group to email, complete your email and send.

If Outlook is not your default browser, see slide 7 for how to get assistance.
• If student registration information is inaccurate on your roster, go to Loyola Self-Service
• Select the Daily Work icon (looks like a briefcase) from the left-side menu.
• Select Faculty
• All faculty forms used by the Records Office appear here.
• Select Class Roster Verification
• Complete the report to notify Records of students registered but not attending or attending but not registered.
  • **Why this is important:** to comply with Federal Title IV Student Aid Program regulations, the annual OMB A-133 Compliance Audit, F-1 Visa regulations, the National Student Clearinghouse Enrollment Verification System, NCAA Division I regulations, and other enrollment verification reporting requirements. Students also benefit from your alert about nonattendance. Students are sent emails reminding them to withdraw before the withdrawal deadline.
  • Records will notify the student to rectify the enrollment discrepancy in accordance with registration policies. Records does not de-register students unless directed to by the student or another authorized office who has received written instructions from the student.
  • By notifying Records, your grading roster may be more accurate when it comes time to submit final grades. A grade is required for every student on your grade roster.
1. After selecting the Loyola Self-Service option:

2. Select the Faculty link.

3. Here is information about each course section for the viewable terms including days/times, location(s) and instructional methods.

4. Select the course section and title hyperlink.

5. Select Grading.

6. There are 3 tabs underneath the Grading tab.

7. Overview: This tab is a student list but will also be used for grading confirmation.

8. Final Grade: Enter Final Grades here.

9. Midterm 1: Enter Midterm Grades here – only permissible for undergraduate courses.

10. Enter grades according to University and departmental requirements. Click in the grade box to select the grade from the dropdown. Review the grade to ensure accuracy before moving to the next student.

11. An Expiration Date is required for I final grades. Format is M/d/yyyy. At midnight of the expiration date, the system converts I (incomplete) grades to Fs. If you enter an expiration date that is not in the future, you will receive an error message asking you to change it to a date in the future. See slide about Electronic Forms for more information.

12. **IMPORTANT:** There is no submit button. When you enter a grade, it is automatically updated to Records unless you miss an error message at the top of the page or the page times out. Error messages may occur involving a date incorrectly entered for incompletes or for grades of FW (Failure to Withdraw).

13. For grades of FW ONLY, Failure to Withdraw, you must enter a Last Date of Attendance, format M/d/yyyy, or check the Never Attended box.

14. **IMPORTANT:** Once all grades are entered, review the entered grades on Overview tab and proofread for accuracy.

15. To ensure grading is complete, review grades just submitted on the Overview tab. If you cannot see them, Records cannot see them. Re-enter them if you cannot see them.
1. After selecting the Loyola Self-Service option:
2. Select the Faculty link.

1. Here is information about each course section for the viewable terms including days/times, location(s) and instructional methods.
2. Select the course section and title hyperlink.
3. Select Grading.
4. There are 3 tabs underneath the Grading tab.
5. Select Midterm 1: Enter Midterm Grades here – only permissible for undergraduate courses.
6. Select the proper grade from the dropdown according to University and departmental requirements.
1. **IMPORTANT**: To identify freshmen to assign all freshmen a midterm grade, look for the class level of “First-Year”. Disregard whether they are marked freshmen first-year or sophomore first-year – just look for first-year.

2. **IMPORTANT**: There is no Submit button. You can make changes and remove the grade until the Records Office marks grading complete at the end of the midterm grading period. You may also hit the Midterm Grading Complete button, but no changes will be permitted for any student after it is marked Complete. **It is not necessary to mark grades complete.**

3. **IMPORTANT**: Review entered grades on Overview tab. This is your confirmation page.

**Note**: To ensure grading is complete, review grades just submitted on the Overview tab. If you cannot see them, Records cannot see them. Re-enter them if you cannot see them.
1. After selecting the Loyola Self-Service option:
2. Select the Faculty link.
3. Here is information about each course section for the viewable terms including days/times, location(s) and instructional methods.
4. Select the course section and title hyperlink.
5. Select Grading.
6. There are 3 tabs underneath the Grading tab.
7. Select Final Grade: Enter Final Grades here.
8. Select the proper grade from the dropdown according to University and departmental requirements.
9. **IMPORTANT**: There is no Submit button. When you enter the grade, it is final. You can make changes and remove the grade until the Records Office verifies the grade which is usually within 24 hours of submission.
10. Expiration date required for I final grades. Format is M/d/yyyy. At midnight on the expiration date, the system converts I grades to Fs.
11. **Note**: Read any error messages in red outlined in a box at the bottom left of the box.
12. **IMPORTANT**: Review entered grades on Overview tab. This is your confirmation page.
13. **Note**: To ensure grading is accurate and complete, review grades just submitted on the Overview tab. If you cannot see them, Records cannot see them. Resubmit them if you cannot see them.
GRADING TIPS

• Entering grades: Be very careful with your mouse that you do not select an incorrect grade.

• Partial submissions: When Self-Service grading is open, after the official end date of the course has passed and once the course is officially ended, you may submit a partially graded roster. You may submit one or more grades, and then go back in later to enter remaining grades, provided electronic grading has not closed. You will not receive a confirmation email. Records recommends submitting the entire grade roster at one time, by the due date.

• Confirmation page: You will receive a confirmation email that your final grades were submitted once all students are graded. To validate the grade entries, select the Grading tab, then select the Overview tab underneath, and review the grades for accuracy. If you do not see the grades on the Overview tab, please begin again, re-enter grades, and be sure to review the Overview tab.
GRADING TIPS CONTINUED

• **Cross-listed courses**: Cross-listed courses can be graded in entirety under any of the cross-listed course numbers. The Grading screen will show the course number of the cross-listed section to the right of the student’s name.

• **When students view official grades**: For final grades, there is a delay between your submission and Records posting grades to Self-Service for students to view (24 hours during business hours, longer over weekends and holidays).

• **Changing grades**: Once final grades are verified and students can see them, you cannot change grades via the web for that course. After that point, you must complete an electronic Change of Grade eForm. The steps are:
  - On the Self-Service main menu, select the Daily Work icon (looks like a briefcase) from the left-side menu.
  - All faculty forms used by the Records Office appear here.
  - Select *Change of Grade*.
  - Follow the Grade Appeal Policy if appropriate in the current catalogue.

• **Midterm grades**: There is no delay in posting grades for midterm rosters. Midterms are posted immediately upon your entering them. Midterm grades can be changed via the web until web grading is turned off at the grading deadline. After the deadline, you must complete a Change of Grade eForm. The steps are:
  - On the Self-Service main menu, select the Daily Work icon (looks like a briefcase) from the left-side menu.
  - All faculty forms used by the Records Office appear here.
  - Select *Change of Grade*.

• **Midterm Grade tips**: Graduate students do not receive official midterm grades and no official midterm grades are issued during the summer for any students.
GRADING TIPS CONTINUED

• **Pass/Fail and Auditing:** If a student is taking a course pass/fail or auditing a course, the system may translate a grade entered by you to fit the registration status. For example, if you assign an $A$, the system will translate that grade into a $P$ or $L$, depending on registration status. You will only notice this when reviewing the grades after you have submitted the grades and Records has updated them for students to view (usually within 24-72 hours, depending on timing, weekends, holidays, etc.).

• **Supporting Forms:** If you enter a final grade of $F$ or $I$ or a midterm grade of $C-$ or below, you are also asked to submit the appropriate forms (Failure, Incomplete, or Midterm Action Report respectively), available for submission via Self-Service under the Daily Work icon (looks like a briefcase) from the left-side Self-Service Faculty menu.

• **Nonattendance and $FW$ grade:** If a student has either never attended or has stopped attending, hopefully you have already notified the Records Office. At this point, you have two options. You may issue an $F$ for failure if the student earned the $F$, or an $FW$ for failure to withdraw. An $FW$ grade is assigned when, in the opinion of the instructor, the student stopped attending or never attended the course and did not officially drop the course according to University policy, making normal evaluation of academic performance impossible. Grades of $FW$ are replaced by Records with an official grade of $F$, after ensuring that no official withdrawal information was received, for the purpose of the academic transcript. The student can make an appeal through the appropriate channels. A grade of $FW$ requires a Last Date of Attendance or a check box in the Never Attended column of the grading screen.

• **Availability of web grading:** Electronic grading is turned off at the deadlines, communicated via email to the faculty by the Records Office. Grading screens are available in inquiry mode for a brief period following the closing deadline. Because students (and parents, if students grant parent/guardian proxy) can view grades via Self-Service and will know when grades have not been issued, it is important that grades be submitted on time.
I is entered without an expiration date:

• Error message reads: Expiration date is required

To resolve: Enter the date you will submit the final grade change to the Records Office. Be certain to use the M/d/yyyy format and enter a future date. Examples of date form: 12/2/2021, 1/21/2022.

I is entered with a past expiration date:

• Error message reads: Please enter a valid date

To resolve: Enter the I and be certain to use the M/d/yyyy format with a future date.

Grade is showing but it cannot be changed or updated.

• Reason: Make sure you are not in the Overview tab underneath the Grading Tab. If you are in the correct Grading screen, grades may have already been verified by the Records Office. Change of Grade Form(s) are now required to be submitted to the Records Office, with the appropriate signatures.

• To resolve: Submit a Change of Grade by going to Loyola Self-Service, Daily Work Briefcase icon on left-side menu, click Faculty, then Change of Grade Form.
GRADING TIPS
INCOMPLETE GRADES

Incomplete Policy for undergraduate v. graduate students in the catalogues. To get to catalogues:

- Go to Inside Loyola
- Click Academic Catalogues
- Choose the appropriate catalogue
- Choose Advanced Search and enter Incomplete Grade, click on Find whole word or phrase only, and click Search
- Click on Curriculum and Policies (UG) or Academic Regulations and Policies (GR) and do a find on the page for Incomplete Grade

Incomplete Expiration date:

- The “I” expires to an “F” at midnight (in the early morning hours) of the date you enter in Self-Service grading – not what you enter on the Incomplete Report form if you do not meet your own deadline for submission of a final grade.

To resolve an incomplete to a final grade: Submit a Change of Grade form

- Go to Inside Loyola
- Loyola Self-Service
- Daily Work Briefcase icon on left-side menu
- Click Faculty, then Change of Grade Form.

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Extending the incomplete: Fill out another Incomplete Report

- Go to Inside Loyola
- Loyola Self-Service
- Daily Work Briefcase icon on left-side menu
- Click Faculty dropdown
- Click Incomplete Report
- Complete the form including checking the third box and providing the new due dates.
- The Records Office will route it to the appropriate Dean for approval of the extension.
  - If the Dean approves, just be sure to turn in a final grade before midnight on the date you provided.
  - If the Dean does not approve, you will be informed by the Records Office.
ELECTRONIC FORMS

- Go to Loyola Self-Service
- Select the Daily Work icon (looks like a briefcase) from the left-side menu, then Faculty.
- Open the desired form and tab into the first field.
- Entering the ID number in these forms, when appropriate, auto-populates the student’s name, and other student information.
- Use the tab key to move sequentially through the form to activate the auto-populate feature.
- Selecting **Sign and Date** serves as your electronic signature. Select **Submit**.
- After submission, you will receive a confirmation email with the form submitted attached.
- Closing the browser window returns you to Self-Service to open another blank form.
- See full instructions for each form on the Records Office web site, [www.loyola.edu/records](http://www.loyola.edu/records), and in the grading emails that are sent from the Records Office prior to each Midterm or Final Grading period.
1. After selecting the Loyola Self-Service option:

2. Select the Faculty link.

3. Here is information about each course section for the viewable terms including days/times, location(s) and instructional methods.

4. Select the course section and title hyperlink.

5. Select Permissions.

6. The Faculty Consent screen gives faculty control over which students can register for an instructor permission course section, provided the section is open. Consent cannot be given for any other reason. It does not give override permission for prerequisites, restrictions, etc.
This screen allows you to control who gets into an instructor consent course.

Instructor Consent courses are determined by the department chair in conjunction with the faculty member and must be submitted to the Records Office by the department chair for the official Loyola catalogue.

Administrative assistants/DPOs with chair permission can also assist faculty with this process.

To issue consent, it is best practice to have the student give you their name and ID number.

Enter the student ID number in the box and click the magnifying glass icon:

Select the student from the list by clicking once on the student:
• A box will appear for you to fill out information.
• Select a status in the dropdown: Permission of Instructor
• Select the only reason presented: Web Registration
• Add any additional comments.
• Click Save
• The student now has permission to register for your course at the appropriate time.
• Your permission does not register students. The students must register themselves.
• Your permission does not waive requisites or override course capacity.
• Be sure not to give more permissions than the course capacity will hold. If you do, it is first-come, first-served.
• Look at your roster to determine whether students have registered.
• Select the *Sign Out* option prior to leaving.
• For further assistance, contact:
  • Records at [Records Office](mailto:Records.Office@Loyola.edu) or 410-617-2769, 2248, or 2503
  • Further assistance can be found at [www.Loyola.edu/records](http://www.Loyola.edu/records), click Faculty tab at top of screen
  • Academic Advising & Support Center (AASC) at [aasc@loyola.edu](mailto:aasc@loyola.edu) or 410-617-5050
  • Office of Technology Support (OTS) at [ots@loyola.edu](mailto:ots@loyola.edu) or 410-617-5555
• Report any inaccurate instructions you detect to the Records Office for correction.

**IMPORTANT:** DO NOT SHARE YOUR PASSWORD WITH ANYONE. IF YOUR PASSWORD HAS BEEN COMPROMISED, PLEASE CHANGE IT IMMEDIATELY.