Email: registrar@brandeis.edu





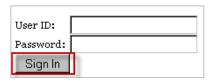
# Department and Academic Administrators Documentation

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### Sage Access

Log into Sage with your UNET user id and password (the same way you log into your Brandeis email). You must have a Brandeis email account before you can be given a Sage account. Navigate to sage.brandeis.edu to log in:



If you or someone in your department is new and needs a Sage account, please follow these steps to request access:

- 1. The person requesting access should learn about FERPA by studying the FERPA Training.
- 2. The person requesting access must pass the FERPA Quiz. A perfect score is required to pass.
- The supervisor must complete the <u>Sage Access Request Form</u>. Please note that the requests can only be made for staff who have already completed the FERPA Training and successfully completed the FERPA Quiz.

### **Semester Term Codes in Sage**

Most requests in Sage require a term (semester) code. Brandeis term codes are 4-digit codes that are broken down as follows:

Always the digit 1	Last two digits of the year - as in 20 <b>12</b>	Represents the semester
1	12	
		1 = Spring
		2 = Summer
		3 = Fall

#### **Examples:**

- Summer 2012 = 1122
- Fall 2012 = 1123
- Spring 2013 = 1131

You can always look up the term code with the looking glass (Q) if you forget it.

#### **FERPA Holds**



Symbol identifying a student who has requested a FERPA hold

Faculty and staff have access to a great deal of student information that is private and protected by federal laws (specifically the Family Educational Rights and Privacy Act – FERPA). This document provides a simple guide to how departments and individuals should handle student information in a manner that will be consistent with FERPA. The full Brandeis University Educational Records Policy may be found on the <u>Education Records Policy</u> page.

FERPA divides student information into two categories – **directory** versus **non-directory** – which are subject to different restrictions.

#### **Directory Information**

Brandeis University considers the following to be public directory information:

- Name
- Address (including electronic address)
- Telephone number
- Date of birth
- Year and registration type
- Dates of attendance
- · Previous institutions attended
- Awards and honors
- Photographs
- Dates of attendance and field of concentration at Brandeis
- Past and present participation in officially recognized sports and activities
- · Weight and height of members of athletic teams

The university makes student directory information available electronically (as an online directory at the start of the fall semester).

While this directory information may be disclosed by the university for any purpose at its discretion — unless the student has requested the information to not be disclosed — faculty and staff should generally refrain from doing so. If directory information is to be released, then you must first check for restrictions preventing release – see Checking for Restrictions below.

#### **Non-Directory Information**

All other information regarding a student's academic record is considered non-directory information. This information cannot be released outside of Brandeis University unless there is prior, written permission from the student. Examples of non-directory information include, but are not limited to:

Grades, GPA, class schedules, test scores, id numbers, financial, medical, and disciplinary records.

#### **Checking for Restrictions**

Students may use the personal privacy settings within Sage to restrict disclosure of directory information, all or in part, at any time. Faculty and staff may see whether students have placed FERPA restrictions on directory information by consulting Sage. When you view student records through the "Students by major/minor" page, or through the "View Advisee Information" page, the presence of restrictions are indicated with a <u>window shade icon</u> to the right of the student's name in Sage. By clicking on the icon you may view the directory information that the student has chosen to release. Brandeis University assumes that failure on the part of any student to specifically request the withholding of public directory information indicates individual approval for disclosure.

# Guideline #1 – Do not disclose/release any student information to an individual or organization from outside Brandeis.

If you receive such a request refer the requestor to the Registrar's Office. Individually identifiable information contained in a student's records may be disclosed to a third party outside of Brandeis University only with a student's prior written consent. Departments should not disclose any information regarding a student record to a third party. All third-party related inquires should be directed to the Registrar's office.

# Guideline #2 – Do not place or post student information in a public location (physical or virtual) without the consent of the student.

Note that this includes the web and print publications, as well as hallways and lounges. Departments and programs that wish to post information about individual students must receive authorization from the student before posting.

# Guideline #3 – Sharing student information with Brandeis colleagues should be limited to legitimate educational purposes.

For example, a PE instructor would likely have no educational purpose for getting a list of the students in the Chemistry PhD program, however an undergraduate advising head does have an educational purpose in asking how majors are performing in courses in the major, and an advisor would have reason for asking about performance in all courses.

# Guideline #4 – Health and safety concerns override FERPA restrictions – you do not need to obtain prior consent when there are concerns regarding the health and safety of a student.

In the event that you are placed in such a situation the safety and health of students and others is the priority. Offices that should be consulted, even if after the fact, are Public Safety, the Dean of Students, Academic Services, and the Registrar's office.

# Guideline #5 - Privacy and FERPA concerns apply to the coursework and tools used in the virtual classroom.

If you are using online tools that would expose student coursework to parties outside the class, then you must include a statement like the following on your syllabus and provide appropriate safeguards: "This class requires the use of tools that may disclose your coursework and identity to parties outside the class. To protect your privacy you may choose to use a pseudonym/alias rather than your name in submitting such work. You must share the pseudonym/alias with me and any teaching assistants as needed. Alternatively, with prior consultation, you may submit such work directly to me."

## **Frequently Asked Questions**

#### What if a Brandeis parent calls to inquire about their child's educational records?

When a student turns 18, or attends a post-secondary institution regardless of their age, the rights associated with FERPA are transferred to the student. Therefore, a parent can find out information regarding their child if the student has given the parent written consent. For students who are still claimed as dependents FERPA allows the university to share information with parents/guardians without the student's explicit permission. However, unless there are health and/or safety concerns, we advise obtaining the student's consent prior to speaking with the parent in any detail.

#### How are letters of recommendation handled under FERPA?

Information regarding a student's academic career may be included in a recommendation; however, the student must provide the instructor with written consent, which would normally be part of the student making the request to the instructor in the first place.

# Is it necessary to have students' permission before posting pictures on the departmental website?

If the student has restricted access to his/her photograph in Sage then, yes, you must obtain the student's permission. This means that you must check in Sage to see if such a restriction has been placed. Courtesy would also suggest that you allow all students the choice of whether pictures they appear in are posted.

# Are there any special circumstances or legal concerns of privacy pertaining to international students?

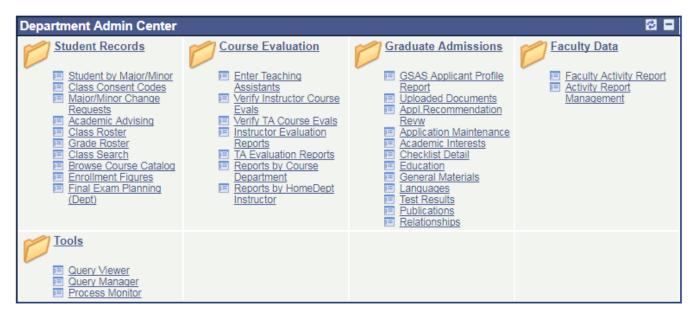
FERPA does not distinguish between international and non-international students; the confidentiality of all student records is protected.

#### Class Lists? Where can you post them?

**Nowhere** that is public – class lists (enrollment information) are protected and confidential. Students enrolled in a particular class can have access to the names and email of their fellow students in the class and that can be handled through the online version of the class in LATTE.

### **The Department Admin Center**

Shortcuts have been created for most of the tasks that department administrators frequently access in Sage. They are in the Department Admin Center. This is the first page you see when you log into Sage.



Once you click on one of the shortcuts in the Department Admin Center, it will take you to the page that you are familiar with seeing. These pages are further explained below.

Tasks that you do which do not have shortcuts in the Department Admin Center can be accessed through the main menu on the left side of the screen.



### Searching for a Course

The Registrar's Office public website offers a display of courses by department that includes cross-listed courses and electives. It is the simplest way to see all the information about a class in one place: class status (open/closed), link to course description, meeting times, enrollment, instructor (links to Faculty Guide), notes (i.e., instructor permission required, etc.) and a link to view course materials in the Bookstore. This page also has a space at the top for important departmental notes.

You can access the public search page by following this navigation: Go to <a href="www.brandeis.edu/registrar">www.brandeis.edu/registrar</a>. Under Registration and Enrollment, click on "Schedule of Classes" and select the term you wish to search. Use the drop-down menu to select a department, select "graduate," "undergraduate," or "all" and click "Go." There is a check-box to view independent instructional courses.



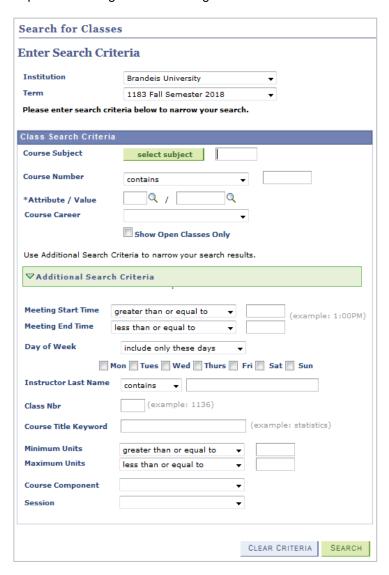
#### Sample of results:



# Finding an Instructor's Class Schedule

From the Admin Center, click "Class Search."

In the search screen, make sure the term you wish to search for is selected from the drop-down menu. Then enter the instructor's last name and click search. You will receive all of the courses being taught in the semester selected, including times and rooms (see below). Various other criteria can be used to search for courses in a department using this search engine.

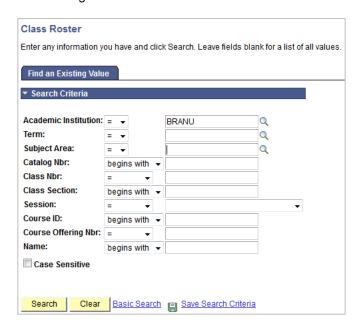


#### Sample of search results:

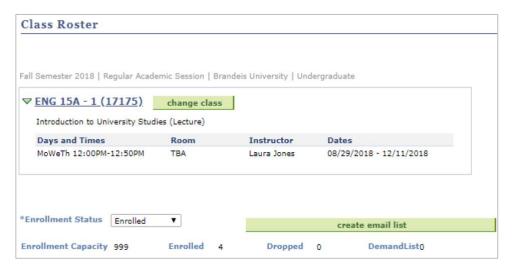


#### **Class Rosters**

You can view the students enrolled in a course on the Class Roster and use the class roster to create an email list. Access the class roster by clicking on "Class Roster" from the Admin Center. Enter the term, subject area and catalog number for the course and click search.



To create an email list, click "Create email list" button at the center of the page.



A new screen will appear with the email data. Copy and paste the information into your email program.

\*\*\*Please use the BCC email function for privacy\*\*\*

Please copy the email addresses and paste into your email program.
Since student records are private, protected information use the BCC/Blind CC function when emailing this group.
aisgroup.satest@lists.brandeis.edu,

### **Class Consent (Permission) Codes**

There are consent codes to *add* courses and consent codes to *drop* courses. They function in exactly the same way they used to function – there are just two sets of them.

Permission to Add codes are used for the following:

- To allow a student to add a course if instructor permission is required
- To allow a student to add a course if the course is closed (full)
- To allow an undergraduate student to add a graduate course (200 and above)
- To allow graduate students to add undergraduate courses (below 90)

Permission to Drop codes are used to do the following:

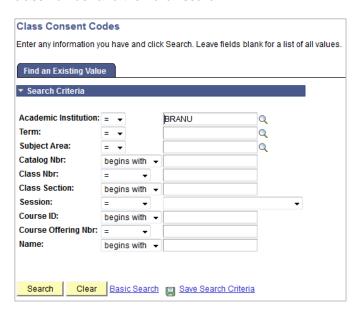
- To allow a student to drop a course that requires instructor permission to drop before the add/drop deadline
- To allow an undergraduate student to drop a course after the add/drop deadline (both with and without a
  "W" grade, depending on the date in the Academic Calendar).

NOTE: Graduate students cannot drop classes in Sage after the add/drop periods ends. Graduate students should complete the appropriate paperwork and refer to the Academic Calendar for deadlines to drop or audit a class.

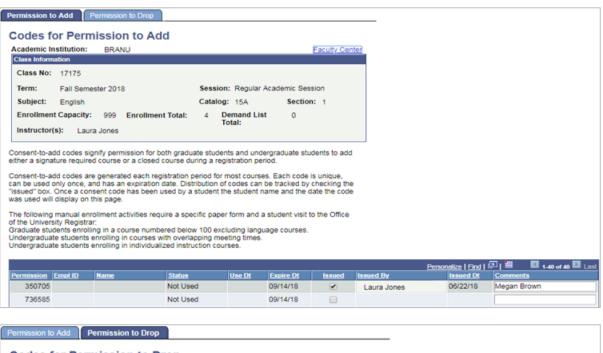
Consent codes are unique and can only be used once. They also have an expiration date so that codes given during early registration cannot be used when final registration begins.

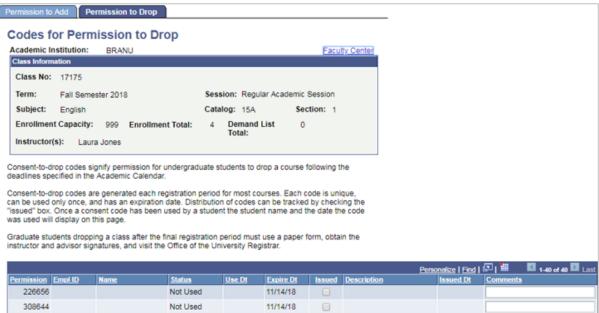
Both faculty and administrators have the ability to track in Sage to whom consent codes are given to prevent giving out duplicate codes (since they can only be used once). And Sage will let you know when the codes have been used, by whom they have been used and when a student who previously used a code has dropped the course (for the case of low-limit, high-demand courses). Faculty and administrators have the same view of this data so they can both give out codes for courses (if needed and authorized) and not worry about giving out the same codes as along as they each check the "issued" box. Don't forget to save!

To access consent codes, click on "Class Consent Codes" from the Admin Center. Enter a term, subject area, class number and then click search:



Here are two sample screenshots of the Permission to Add and Permission to Drop tabs:





To issue a consent code, enter the name of the student in the Comments field and check the Issued box. Hit Save before copying the Permission number. Email the permission number to the student. Each code can only be used once and will expire on the date indicated. When a code has been used, the student's name and date will appear next to the permission number.

#### **Online Grade Submission**

All grades are submitted by the instructors directly to the Registrar's Office via Sage. Grades for graduating students are due earlier than for continuing students (please see deadlines in the academic calendar). Graduating students who expect to complete their program at the end of the current semester (both seniors and graduate students) are indicated on the Sage grade roster with an asterisk in front of their name.

Administrators do not have access to submit grades.

If an instructor submits an unsatisfactory grade for an undergraduate student (a grade below a C- or an NG) , please fill out the <u>Undergraduate Academic Performance Report</u>, the Office of Academic Services needs the details of why the student was awarded an unsatisfactory grade. Such students are reviewed by the Committee on Academic Standing after each term, and may be placed on probation and/or withdrawn from the University and your information may be crucial to the committee's decisions.

#### The Student Center

All information about a student, including their degree audit, transcript, personal information is available on or through the Student Center. Administrators can access the Student Center through the Student's by Major/Minor Page.



There are several sections on the Student Center to pay attention to. At the very top, it indicates if a student has a hold as well as displays the FERPA privacy indicator. Any holds are further explained in the "Holds" box in the right column.

There are two main boxes:

**Academics**: Links to all of a student's academic records are here. Click each one to be directed to another page to view the academic information you are accustomed to seeing about a student.

**Personal Information**: Most of the information you want to know about a student is already visible in the box. Some students have given Brandeis Emergency Contact information and you can view this by clicking on the link.

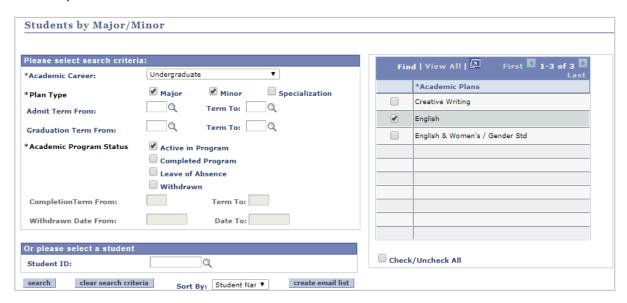
The "To Do List" is a feature in use by the Study Abroad Office to track the tasks students are requested to do during the semester abroad.

# **Major/Minor Lists**

Lists of students in your major or minor may be obtained on the **Students by Major/Minor link** on the admin center. There are many options on this page including selecting students by the year they entered Brandeis, expected graduation date, status (active, withdrawn, leave of absence), and lists of students who already have a degree.

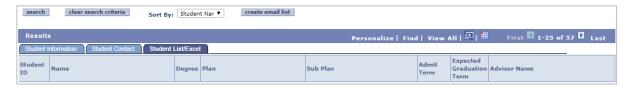
Once you select a group of students to view, you can also use this list to create an email list or a spreadsheet. You can also click into each student's Student Center to view their academic and personal information.

Basic required fields to obtain a list:



Sample of results: These results can be sorted in a variety of ways to suit your needs. To create an email list from these results, click "Create Email list" and follow the instructions above under "Class Rosters." To go to the student's Degree Audit, click on "Degree Audit."

Student data from the "Student List/Excel" tab can be copied and pasted into an Excel spreadsheet. Highlight all of the data, then right click and select "copy" or Ctrl "C", then in the blank Excel spreadsheet, choose the cell you want to paste the data into, then right click and select "Paste" or use Ctrl "V".

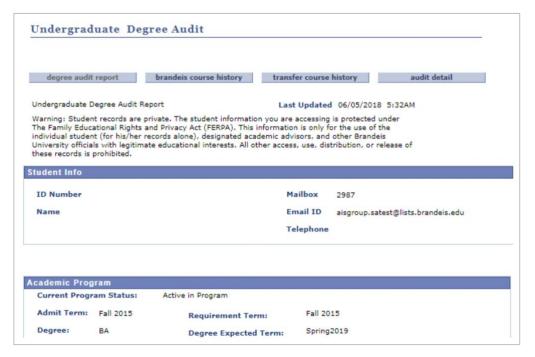


To obtain a specialized list, such as graduating students in a particular semester or newly admitted students, use the additional search criteria boxes to narrow your search.

# **Undergraduate Degree Audit**

The Undergraduate Degree Audit displays a student's progress toward completion of their major/minor, as well as their Brandeis course history and transfer credit. The first page is a summary which indicates the year of the

student's major requirements and their expected graduation date along with the links to their major/minor degree audit.



General Univ. Reqs	Plan Type:	Advisor: Flood,Erin	
		In Process	
English	Plan Type: Major	Advisor: McCauley, Stephen D.	
English and	American Literature Major	In Process	
English and Requirement	American Literature Departm	nental In Process	
Business Ma	Plan Type: Major	Advisor: Stoller,Linda In Process	
Economics	Plan Type: Minor	Advisor: Menon, Nidhiya	

Summary S	tatistics						
CUM GPA	Brandeis Total Earned Units	Transfer Units	CUM Total Units	In Proce	ss Units	Projected Total Units	
3.383	82	0	82	40		122	
General Un	iversity Requiren	nents Summar	v				
Requiremen			_		Description		
•			In Process				
Minimum Brandeis Semesters				In Process			
Minimum Brandeis Units			In Process				
Minimum 2.0	00 Overall GPA				3.383		
Writing Sem	inar: UWS				Complete		
Writing Inte	nsive				Complete		
Writing Inte	nsive or OC				Complete		
Non-Wester	n Comparative				Complete		
QR and Scho	ol Distribution				Complete		
Quantitative Reasoning			Complete				
School of Creative Arts			Complete				
School of Humanities		Complete					
School of Sc	ience				Complete		
School of Sc	cial Science				Complete		
Foreign Lang	guage				Complete		
Physical Education				Complete			

The Transfer Course History tab shows all transfer credit that has been approved and accepted by Brandeis. A department cannot count, toward a major or minor, any credit that does not appear on this page. If a course does not appear on the degree audit that may be because the student has not completed Online Petition to Request Substitution for a Requirement. However, if a course has not been accepted for transfer credit by Brandeis, a department cannot count it toward a student's major or minor.

"Units earned" is related to university residency and is not relevant for whether or not courses count toward major or minor credit. As long as a course appears on this page it is eligible to count toward a major or minor.

## Making Major/Minor/Advisor Changes directly in Sage

Departments can now add and drop majors and minors, change degrees (BA/BS), change advisors, and change tracks/specializations directly in Sage for undergraduate students. No more paper forms to keep track of! Department Chairs should notify the Registrar's Office of whom they would like to be authorized to submit these updates in Sage.

To find it, click on "Major/Minor Change Requests" from the Admin Center.

#### Step 1:

Enter the name or ID number of the student for whom you would like to make the major/minor changes and click "Search."



#### Step 2:

Any majors or minors that the student currently has declared are displayed in the box at the top. From the drop-down menu, select the action you would like to do on behalf of this student and then click "Go."

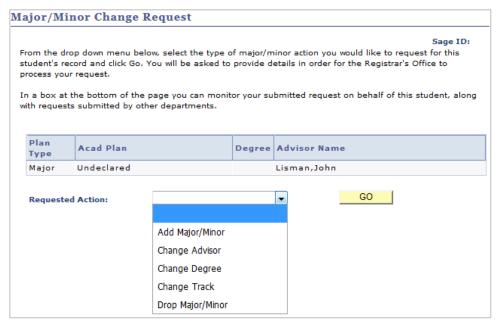
#### Adding a Major or Minor:

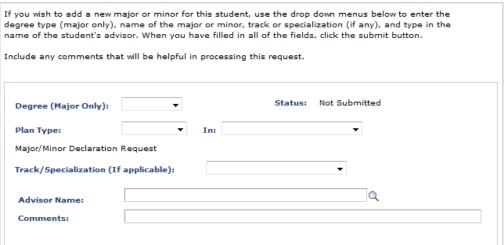
Select "Add Major/Minor" from the drop-down menu and click "Go." When the "Add" screen comes up, fill in the 4 required fields and click "Submit."

- 1. Degree BA or BS (for majors only)
- 2. Plan Type Major or Minor
- 3. In Select the major or minor you are declaring
- 4. Advisor Enter the advisor's name

There are two optional fields:

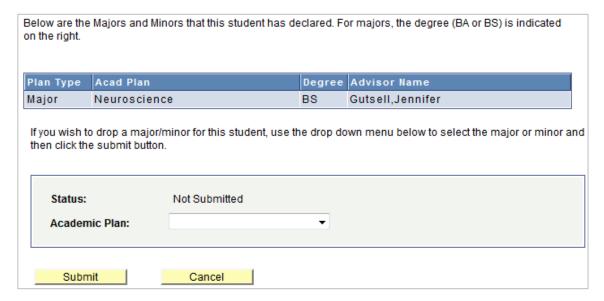
- 1. Track/Specialization
- 2. Comments If there is any information that may be helpful for the Registrar's Office in processing your request, please enter it here.





#### **Dropping a Major or Minor:**

Select "Drop Major/Minor" from the drop-down menu and click "Go." When the "Drop" screen comes up, select the major or minor you wish to drop and click "Submit."

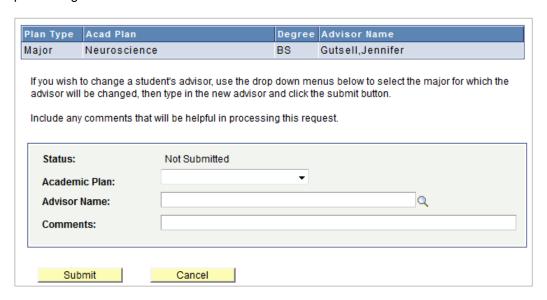


#### **Changing Advisor:**

Select "Change Advisor" from the drop-down menu and click "Go." When the "Change Advisor" screen comes up, there are 2 required fields:

- 1. Academic Plan the major or minor for which you wish to change the advisor
- 2. The NEW advisor (the current advisor is listed in the box at the top)

If you wish to make any comments, enter those in the "Comments" field. Click "Submit" to submit your request for processing.



#### **Changing Degree:**

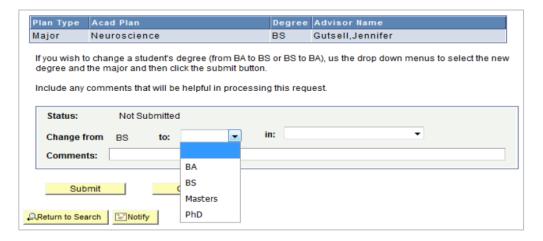
Note: This option only applies to those majors which can change between BA and BS (in the School of Science and HSSP).

Select "Change Degree" from the drop-down menu and click "Go." When the "Change Degree" screen comes up, there are 2 required fields:

- 1. Change from The degree that the student currently has declared for their first major automatically appears. In the drop-down menu, select the degree that you would like to change to.
- 2. In select the major for which you would like to change the degree.

If you wish to make any comments, enter those in the "Comments" field.

Click "Submit" to submit your request for processing.



#### **Changing Track:**

Note: This option only applies to those majors which have tracks or specializations.

Select "Change Track" from the drop-down menu and click "Go." When the "Change Track" screen comes up, there are 2 required fields:

- 1. Major Select the major for which you wish to change the track or specialization.
- 2. From and To If the student currently has a track, it will appear under "From." Use the drop-down menu to select the student's new track.

If you wish to make any comments, enter those in the "Comments" field. Click "Submit" for processing.

# **Graduate Degree Audit Checklists and Milestones**

The graduate degree check list in Sage monitors the progress a graduate student is making toward completion of his/her program requirements, such as courses, residency, qualifying exams, teaching, language, dissertation prospectus, and dissertation. Unlike the undergraduate degree audit the graduate student check list is not currently automated and as such does not track completion of specific courses but only whether course work is complete or not.

The department administrator is responsible for updating a student's check list with the Registrar's Office by using the Master's or PhD Degree Audit Check List Update Form found on the Forms link on the Registrar's home page. This form also allows the department to provide detail relating to languages, qualifying exams and dissertation prospectus which is then conveyed as milestones on the student's academic transcript. Final dissertation titles also become milestones on the transcript.

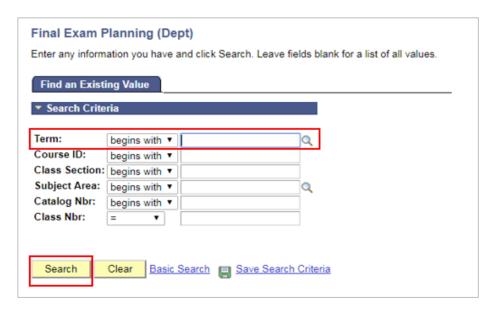
View the Graduate Degree Audit Checklists from the Student Center.



# **Final Exam Planning**

Faculty are required to submit their plans for giving a final exam early in the semester so that the Registrar's Office can prepare the final exam schedule, order bluebooks and hire proctors. This is done through the Final Exam Planning Page in Sage. Faculty will be notified when the planning page is available to view. Some academic administrators assist faculty with providing us this information or assist us with contacting faculty who have not completed the Planning Page. Faculty access the Final Exam Planning page through the Faculty Center.

To access the Final Exam Planning page, click on "Final Exam Planning" from the Admin Center.



Select the term for which you need to either enter or view final exam data for and click enter. All of the exams you have the ability to view will appear.

Click on the course you wish to view or make final exam selections for and this screen will appear. If you select "Yes" you will be given a set of questions to answer for the Registrar's Office to prepare for the exam. If you answer "No," no other information is needed. If you have additional courses, you can click "Next in List" to go to the next course." When all the data has been entered, you must click "Save."