

## Advising Notes

The advising notes feature enables advisors to record notes about their interactions with students. They can be used to create notes with related comments, attachments and action items. The Advisor can send notifications to students, and a third person, regarding a note, and allow students to view, add comments and attachments to notes.

Advising notes should be used to document the advising session that you have with a student. The advising notes are used only for **advising-related comments**. Documenting advising interactions improves communication across campus, improves relationships with students and increases the likelihood of consistency and continuity of advising services.

### Best Practice for Writing Advising Notes


**IMPORTANT:** Remember that students can request access to these notes, even if advisee access is not selected on the note. They can also be subpoenaed by third parties under FERPA guidelines.

1. Inform the student that advisors make academically pertinent notes which are **viewable** by others. Use a **professional tone** when recording advisor/student interactions.
2. Keep notes **brief** and **relevant** and use only the most commonly understood abbreviations, (i.e. AA, TC, Gen Ed., ADHE, etc.).
3. Record any advising interactions that will **require future follow up** on the part of the student or advisor.
4. Advisors should document **referrals to other departments**. If the referral is of a sensitive nature (for example, to Student Support Services or Food Pantry), the advisor can write, "Student referred to appropriate department."

### Creating an Advising Note

1. Click the Advisor Center tile.
2. Click the Degree Audit (Advisor) from the left-hand navigation.

The screenshot shows the 'Degree Audit Plan Selection' interface. On the left, a navigation menu includes 'My Advisees', 'Advisee General Info', 'Advisee Transfer Credit', 'Academic Test Summary', 'Advisee Academics', 'Degree Audit (Advisor)', 'Hold Release', 'UA Success', 'Report Student Concern', 'Accessibility Options', and 'UAConnect Help'. The main area features the University of Arkansas logo and the title 'Degree Audit Plan Selection'. Below this is a 'Student Id' field. A red warning message states: 'This degree audit should be used in conjunction with the Catalog of Studies and regular meetings with your academic advisor. While every effort has been made to ensure this report's accuracy, your dean's office has the final authority for certifying degree requirements. If you have any questions concerning this audit, please contact your academic advisor or your college dean's office.' Below the warning is a table for 'Degree Audit Notes(0)' with columns for 'User ID', 'Date Entered', and 'Description', and a 'Save note' button. A filter bar shows 'Completed', 'Enrolled', 'Planned', and 'Unmet' filters, with a red arrow pointing to the 'Unmet' filter. Below the filter bar is a checkbox for 'Include Planned Courses:' which is checked. Under the heading 'Plans', there are three rows, each with a 'Run Report' button and a red 'X' icon next to the plan name: 'University Requirements', 'College Honors-ENGR', and 'Civil Engineering (BSCE)'.

3. Click the **Create a Note**  icon.
4. Click the **Create a Note** button.

5. Select the note category of **Advising Notes**.
6. Select a note subcategory from the drop-down list; **Advising, Degree Audit Notes** and **Degree Clearance Notes**.
7. Assigned to defaults to the current user. You can also assign the note to another advisor by changing the assignee. To change the assignee, click on the spy glass and search for and select a different advisor.
8. Enter a subject line for the note.
9. Status defaults to **Open**. Should be changed to **Closed** once action items are completed.

10. Advisee Access defaults to **No**. Select **Yes** to allow advisee access to see the note.
11. Select **Contact Type** from the drop-down list; By phone, E-mail or In Person.
12. Create the text for the advising note.
13. It is optional to add, browse and remove **Action Items** for advising notes. The **Entered on** date is automatically recorded. You can set a **Due Date** for an Item and Action Item Status to either **Complete** or **Incomplete**.
14. You may add, view and remove files as **Attachments** to the advising notes as needed.
15. Click the **Submit** button to Save the note.
16. Click Notify Advisee to create an email notification.

**Advising Note**

Institution The University of Arkansas  
 Category Advising Notes  
 Subcategory Advising  
 Assigned To [User]  
 Subject Discussion about changing majors

Created On 02/01/2019  
 Created By [User]  
 Status Open  
 Advisee Access No  
 Contact Type By Phone

Update Note **Notify Advisee**

**Note Items**

Note Item	Entered On	Entered By	Comment
1	02/01/2019	[User]	Discussion with Soolie on the pros and cons of changing majors from Sociology to Political Science.

**Action Items**

Action Item	Entered On	*Description	*Action Item Status	*Due Date
1	02/01/2019	Send change of major form	Incomplete	02/20/2019

**Attachments** Augit

Attached File	Description

Return

17. Enter email text and click Send.

**Notify Advisee**

Send notification to advisee

Additional message (optional)  
 Please check your advising notes and complete the change of major form

Cancel Send

18. An email will be sent to the preferred email address selected in UAConnect.

Discussion about changing majors

Advising Note: [Discussion about changing majors](#)

Category: Advising Notes                      Sub Category: Degree Clearance  
Note Status: Open

Additional Message:  
Please check your advising notes and complete the change of major form

Optional Navigations:

From the **Degree Audit Report** page, click the **Create Advising Notes** icon.

**Degree Audit Report Detail**

UNIVERSITY OF ARKANSAS

Student Id: [Redacted]

Program: [Redacted]

Plan: UNIV REQTS

Sub-Plan: [Redacted]

Req Term: Fa 2016

Last Updated: 02/25/2019 04:54 PM

Advisor: [Redacted]

Total Hours: 84

Online Hours Towards Degree: 0


Online Hours Towards Plan: 0

Cum GPA: 3.800

Applied for Graduation: None

Academic Standing: Good Standing

Sort results by: [Dropdown] [Sort](#)

[View Transfer Credit](#) [Go To Planner](#) 

**Degree Audit Notes(0)**

Completed Enrolled Planned Unmet Online \*denotes a "C" or better grade needed \*\*denotes a "B" or better grade needed

FRG denotes Grade Forgiveness

From the **Degree Audit (Admin)** page, click the **Related Content** link and select Advising Notes.

**Degree Audit (Admin)**

Faculty/Advisor Homepage

UNIVERSITY OF ARKANSAS


**Degree Audit Plan Selection**

Student Id: [Redacted] 3rd Party Release

This degree audit should be used in conjunction with the Catalog of Studies and regular meetings with your academic advisor. While every effort has been made to ensure this report's accuracy, your dean's office has the final authority for certifying degree requirements. **If you have any questions concerning this audit, please contact your academic advisor or your college dean's office.**

**Degree Audit Notes(0)**

User ID	Date Entered	Description	Save note
[Redacted]	04/04/2019		<a href="#">Save note</a>

Completed Enrolled Planned Unmet  (1)

[Related Content](#) [New Window](#)





Advising Notes

From the **My Advisees** list, click the Advising Notes icon.

**My Advisees**

Select display option

Link to Photos  Include photos in list

Notify	Photo	Name	Career	ID	Committee	View Student Details	Advising Notes
1		[Redacted]	Undergrad	[Redacted]		<a href="#">View Student Details</a>	
2		[Redacted]	Undergrad	[Redacted]		<a href="#">View Student Details</a>	

Personalize | Find | 1-24 of 24

### Filtering Advising Notes

1. Click the **My Advising Notes** button at the bottom of the **My Advisees** page to filter your advising notes.

Select display option  
 Link to Photos       Include photos in list

Personalize | Find | |      1-23 of 23 >

	Notify	Photo		Name	Career	ID	Committee	View Student Details	Advising Notes
1	<input type="checkbox"/>			[blurred]	Undergrad	[blurred]		View Student Details	
2	<input type="checkbox"/>			[blurred]	Undergrad	[blurred]		View Student Details	
23	<input type="checkbox"/>			[blurred]	Undergrad	[blurred]		View Student Details	

2. Filter/sort by **Subcategory, Status, Contact Type, Created By, Created, Last Updated** and **Action Items**.

This page displays advising notes assigned to you. Use the filters, as needed, to narrow your search results. Also use the column headings to in the grid to sort in ascending or descending order. Click the ID to access the detail about a particular note or to add an additional comment to a note.

**Filter Notes**

Institution:   
 Category:   
 Subcategory:   
 Status: Open   
 Contact Type:

Created By:   
 Created:   
 Last Updated: 7 Days   
 Action Items:

**Student Details** Personalize | Find | |      First 1-5 of 5 Last

Advising Note	Name	Institution	Subject	Category	Subcategory	Contact Type	Assigned To	Created By	Status	Action Items	Last Updated
	[blurred]	The University of Arkansas	Discussion about changing majors	Advising Notes	Degree Clearance	By Phone	[blurred]	[blurred]	Open	Pending	02/26/2019
	[blurred]	The University of Arkansas	Your degree audit report	Advising Notes	Degree Audit Notes	In Person	[blurred]	[blurred]	Open	Pending	02/25/2019