

# **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.

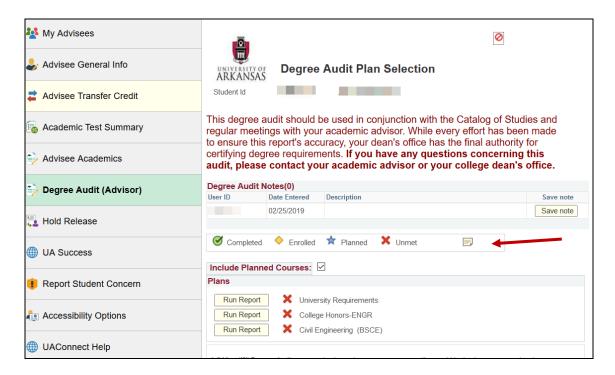
## **Best Practice for Writing Advising Notes**

**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."

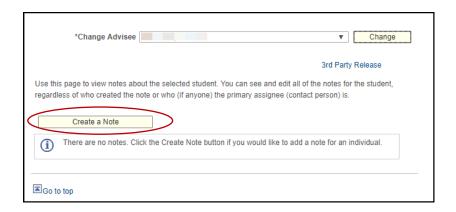
# **Creating an Advising Note**

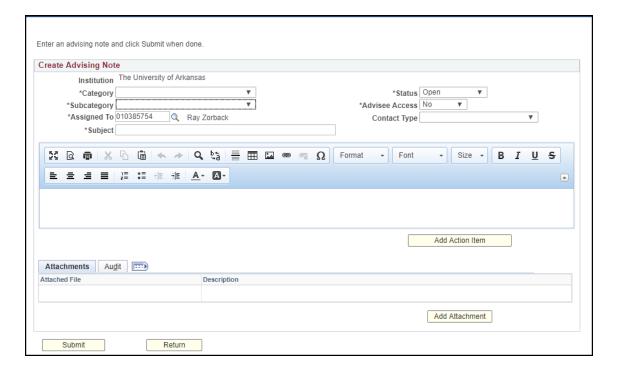
- 1. Click the Advisor Center tile.
- 2. Click the Degree Audit (Advisor) from the left-hand navigation.





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

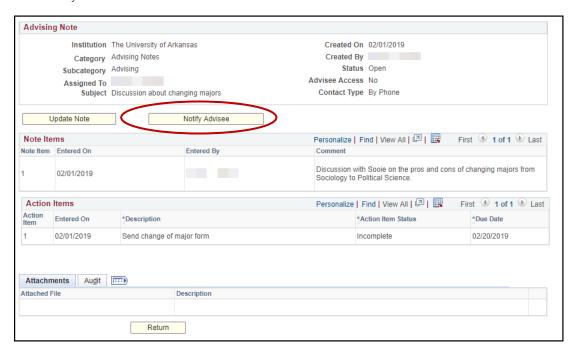




- 5. Select the note category of **Advising Notes**.
- 6. Select a note subcategory from the drop-down list; Advising, Degree Audit Notes and Degree Clearance Notes.
- 7. Assigned to defaults to the current user. You can also assign the note to another advisor by changing the assignee. To change the 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-drown 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.



17. Enter email text and click 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

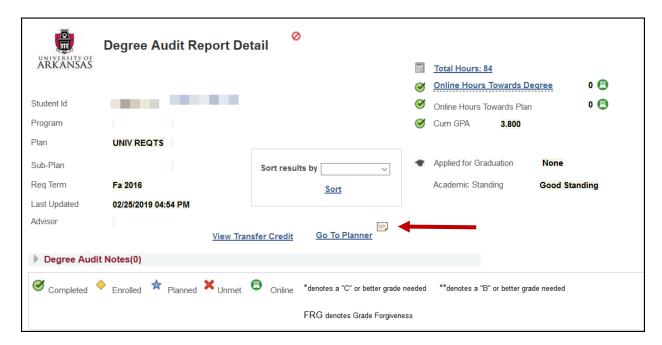
Additional Message:

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

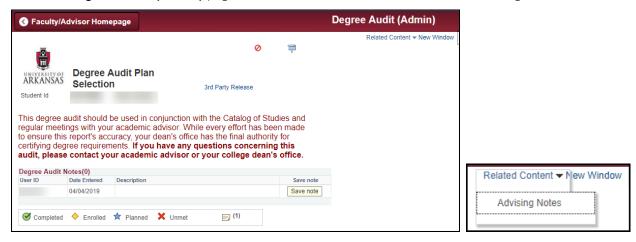


#### **Optional Navigations:**

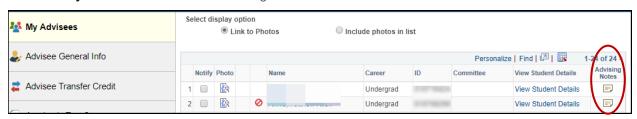
From the **Degree Audit Report** page, click the **Create Advising Notes** icon.



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



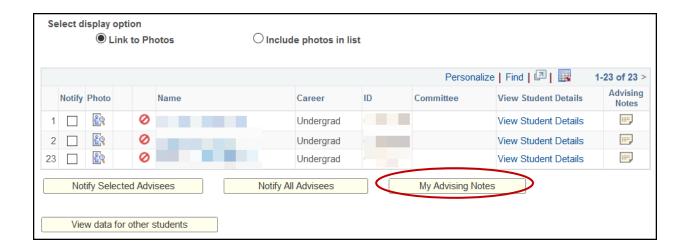
From the My Advisees list, click the Advising Notes icon.





## Filtering Advising Notes

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



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

