

Advising Notes

Academic Advising Notes

Providing quality academic advising to students at all levels is critical service for most institutions. As advisors, you assist students in making significant academic and life decisions which require timely communication and notation to student advisement records. Academic Advising notes intends to provide advisors and other users the ability to record notes about their interactions with students to provide functionality focused on facilitating communication regarding those notes.

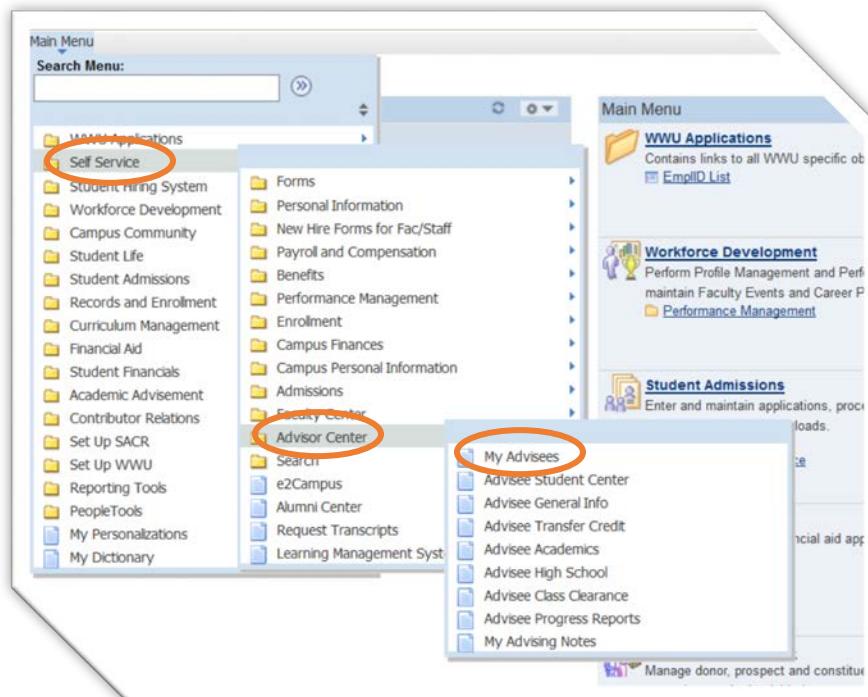
Review History of Advisee Notes

Chances are that your student will have multiple advisors throughout their time at WWU. If a student changes majors, adds on a pre-professional program, etc. Keeping notes and reviewing notes can assist an advisor with communicating with a student.

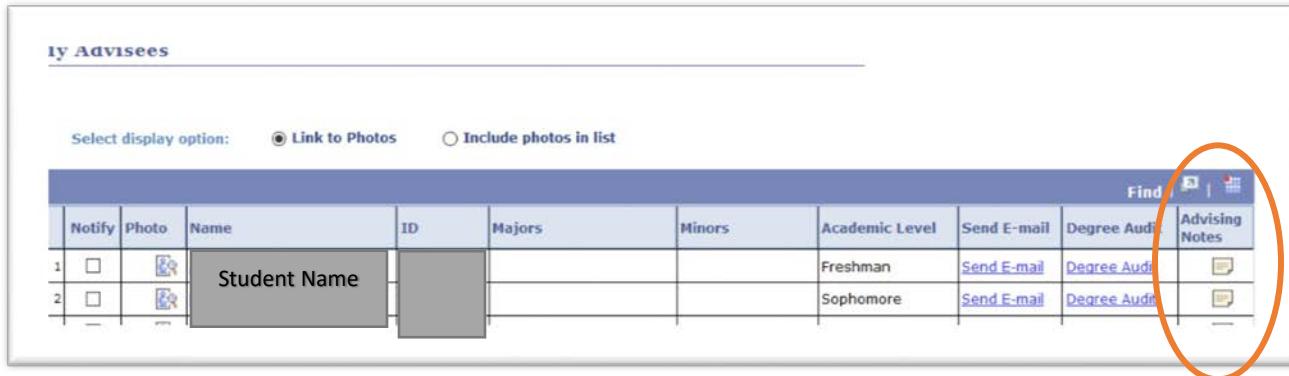
Advisor notes can be reviewed by past advisors. Keeping Notes and reviewing past advising notes can assist you with your communication.

Creating an Advising Note

1. Open **Advisor Center** : Main Menu>Self Service>Advisor Center



2. Click on **Advising Notes** icon for the student you wish to make a note on



The screenshot shows a list of advisees. The columns include: Notify, Photo, Name, ID, Majors, Minors, Academic Level, Send E-mail, Degree Audit, and Advising Notes. The 'Advising Notes' column is circled in orange. The 'Name' column contains 'Student Name'. The 'Academic Level' column shows 'Freshman' and 'Sophomore'. The 'Send E-mail' and 'Degree Audit' columns contain links. The 'Notify' and 'Photo' columns have checkboxes and icons.

	Notify	Photo	Name	ID	Majors	Minors	Academic Level	Send E-mail	Degree Audit	Advising Notes
1	<input type="checkbox"/>		Student Name				Freshman	Send E-mail	Degree Audit	
2	<input type="checkbox"/>						Sophomore	Send E-mail	Degree Audit	

When you click “**Create a Note**” icon you will be directed to several options which include:

- Change institution to “Walla Walla University”
- Choose a category
 - a. Academics
 - b. Career
 - c. Class Schedule Planning
 - d. Degree Audit
 - e. Other
- Choose a subcategory
- Key in the subject of the discussion
- Choose to allow Records to see or keep private
- Choose to allow student to see or keep private
- Click “Add Action item”
- Click “Add Attachment” if you want to upload documents

Faculty Center
Advisor Center
Search

my advisees
student center
general info
transfer credit
academics
high school

Advising Notes

Student Name

Enter an advising note and click Submit when done.

Group Box

*Institution	<input type="text" value="Walla Walla University"/>	*Status	<input type="text" value="Open"/>
*Category	<input type="text"/>	*Advisee Access	<input type="text" value="No"/>
*Subcategory	<input type="text"/>		
*Assigned To	<input type="text"/>		
*Subject	<input type="text"/>		

Format

Click here add a note → add action item

Attached File	Description

Click here add attachment → add attachment

SUBMIT
RETURN

Note Categories

Select the appropriate category when adding your advising note

- Academics
- Career
- Class Schedule Planning
- Degree Audit
- Other
- Personal Notes
- Senior Outline

PeopleSoft.cs

Herlinda Ruvalcaba

Faculty Center Advisor Center Search

my advisees || student center || general info || transfer credit || academics || high school

Advising Notes

Camie Jepson

Enter an advising note and click Submit when done.

Group Box

*Institution: Walla Walla University

*Category: **Academics** (highlighted with an orange box)

*SubCategory: **Career** (highlighted with an orange box)

*Assigned To: **Camie Jepson**

*Subject: **Personal Notes** (highlighted with an orange box)

Format: Font, Size, B, I, U, S, etc.

From this dropdown box, you can choose from different categories to make an advising note.

Attachments Audit

Attached File Description

add attachment

SUBMIT RETURN

Description of Note Categories and Examples

Academics

Group Box

* Institution	Walla Walla University	* Status	Open
* Category	Academics	* Advisee Access	No
* Subcategory			
* Assigned To	Herlinda Ruvalcaba		
* Subject			

- I. Academic Progress/Probation (Subcategory)
- II. Academic- Other (Subcategory)

Examples:

- Student struggling with a class
- Honor's student
- Student wanting to drop class due to poor grade

Career

Group Box

* Institution	Walla Walla University	* Status	Open
* Category	Career	* Advisee Access	No
* Subcategory			

- i. Future Employment Opportunities
- ii. Internship/Coop
- iii. Major/Minor

Examples:

- Discussion/Advise about employment options and opportunities
- Discussion/Advise about internships and coop opportunities
- Discussion/Advise about major/minor choices and best fit

Class Schedule Planning

Group Box			
*Institution	Walla Walla University	*Status	Open
*Category	Class Schedule Planning	*Advisee Access	No
*Subcategory			

- i. Fall
- ii. Full Year Schedule
- iii. Spring
- iv. Summer
- v. Winter

Examples:

- Advise concerning student's class schedule
- Dropping/adding classes
- Suggestions on options for future quarters

Degree Audit Adjustments

Group Box			
*Institution	Walla Walla University	*Status	Open
*Category	Degree Audit Adjustments	*Advisee Access	No
*Subcategory			

- Non-substitution adjustments and comments

Example:

- Discussion with student about degree audit
- Corrections needed in the degree audit

Other

Group Box			
*Institution	Walla Walla University	*Status	Open
*Category	Other	*Advisee Access	No
*Subcategory			

Example:

- Comments that do not fit within a category
- Emotional State of a student
- Discussion on Personal life affecting school

Personal Notes

Group Box			
*Institution	Walla Walla University	*Status	Open
*Category	Personal Notes	*Advisee Access	No
*Subcategory			

- i. Meeting Notes
- ii. Reminders

Example:

- Set-Reminders to check on student's grade in a certain class
- Notes on how the meeting went

Senior Outlines

Group Box

*Institution	Walla Walla University
*Category	Senior Outline
*Subcategory	
*Status	Open
*Advisee Access	No

Examples of Notes:

- Planning the Senior Outline
- Suggestions for degree completion options
- Changes to the senior outline

To Complete Advising note click “Submit”

peopleSoft_{cs}

Favorites Main Menu > Self Service > Advisor Center > My Advisees

Herlinda Ruvalcaba

Faculty Center Advisor Center Search

my advisees || student center || general info || transfer credit || academics || high school

Advising Notes

Camie Jepson

Enter an advising note and click Submit when done.

Group Box

*Institution	Walla Walla University
*Category	
*Subcategory	Academics
*Assigned To	Career Class Schedule Planning Degree Audit Adjustments Other Personal Notes Senior Outline
*Subject	
Format	

add action item

Attachments Audit

Attached File Description

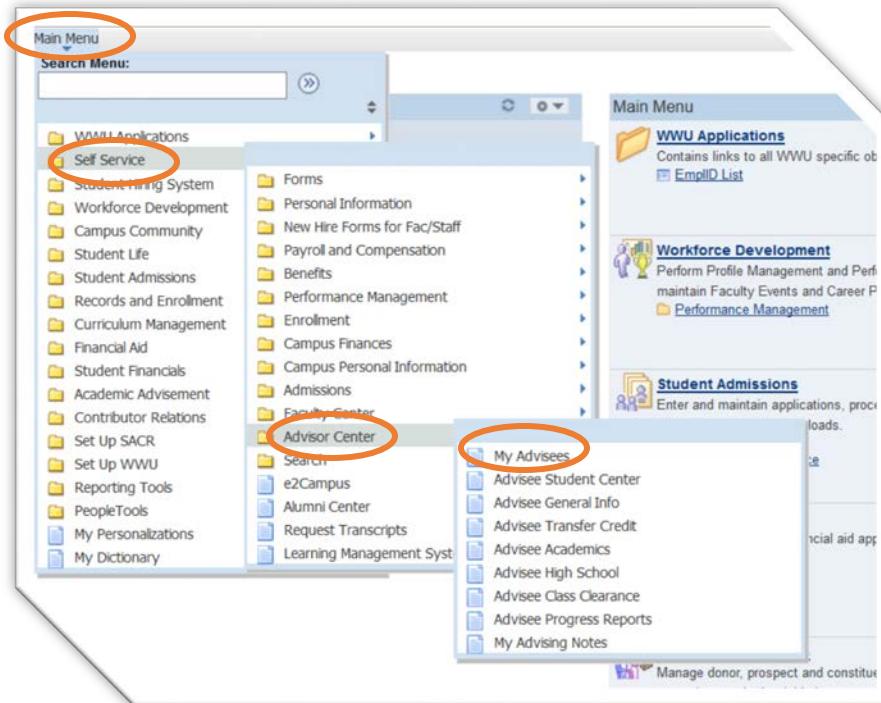
add attachment

Submit RETURN

The 'Submit' button is circled in orange.

Review Notes Previous Advising Notes:

Main Menu>Self Service>Advisor Center>My Advisees



The screenshot shows the 'Advising Notes' page. At the top, there is a search bar and a 'Change Advisee' dropdown. The main content area has a heading 'Information as to who Note is created by and assignment of who can view'. Below this, a table displays a list of notes:

Advising Note	Created By	Assigned To	Institution	Subject	Category	Subcategory	Note Status	Action Items	Last Updated
			Walla Walla University	progress reports	Academics	Academic Progress/Probation	Open	None	11/09/2015
			Walla Walla University	classes	Class Schedule Planning	Winter	Open	None	11/09/2015
			Walla Walla University	report on classes	Academics	Academic Progress/Probation	Open	None	02/04/2016
			Walla Walla University	has been ill	Personal Notes	Meeting Notes	Open	None	03/03/2016
			Walla Walla University	Progress Reports	Academics	Academic Progress/Probation	Open	None	05/18/2016
			Walla Walla University	Missed Check-In	Academics	Academic Progress/Probation	Open	None	06/03/2016

