

In Campus Solutions, advising notes are used to document the advising session that you have with a student. You will place other notes and comments in other locations throughout Campus Solutions in Campus Community. The advising notes are just for advising-related comments.

Documenting advising interactions improves communication across campuses, improves relationships with students, and increases the likelihood of consistency and continuity of advising services. The following guideline are adapted from the University of Utah's guidelines, and are intended to provide you with reminders about how to effectively and appropriately document your advising interactions with students.

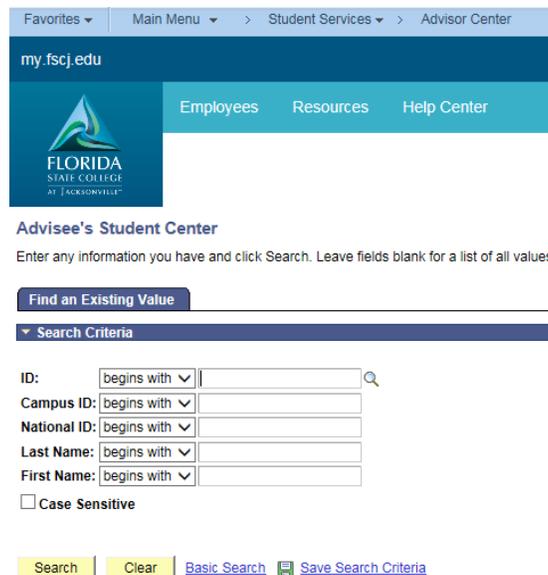
Note Taking Guidelines

1. Inform the student that advisors make academically pertinent notes which are viewable by others. For example, "I will be writing some notes after our conversation to summarize what we talked about today, and any follow up that you or I will take. These notes will be stored in our student database and may be seen by another academic advisor. This is so that we can best help you with your advising questions."
2. Remember that students can request access to these notes, and that they can be subpoenaed by third parties under FERPA guidelines. Use a professional tone when recording advisor/student interactions.
4. Keep notes brief and relevant, and use only the most commonly understood abbreviations (i.e., AA, TC, Gen Ed, SB1720, etc).
5. Record facts and observations, and NOT inferences or For example, we would not write, "student seems depressed" or "student seems anxious", but rather, "student talked about personal issues which are currently stressors/challenges".
6. Record any advising interactions that will require future follow up on the part of the student or advisor.
7. If there is room for question or misunderstanding regarding information provided to a student during an advising session, record details on advice given in case of future For example, "Advised student that AMH2010 from would clear Soc Sci requirement, but PSY1012 will not."
8. Advisors should document referrals to other departments and campuses. 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".
9. Document information given regarding College policies and procedure. For example, "Student had questions about withdrawing from her math class. Explained drop with penalty, provided deadline and reviewed appeals process."
10. Sensitive information should only be included in your notes when academically appropriate. For example, specific student behavior issues (accusations of plagiarism, discipline interventions), very personal information about a student, their health, family, etc. should be handled with discretion. The focus should be on the impact of the issue on the student's performance rather than the precise nature of the issue.

11. REMEMBER: You can keep notes in a separate, personal file if there is something you need to remember, but do not want it included on the student’s PeopleSoft record. If you keep personal notes, you must protect the confidentiality of those notes, keep them for only as long as relevant, and take care to destroy them in a confidential manner. If you share personal notes with any other College personnel, it becomes part of the student’s FERPA record.

Adapted from <https://advising.utah.edu/uac/education/peoplesoft.php>

Step	Action
1.	<p>Begin by navigating to the Advisee Student Center:</p> <p>Click the Main Menu > Campus Solutions > Self-Service > Advisor Center > Advisee Student Center</p> <p>OR from the myFSCJ landing page after logging in with your credentials: Click Student Services > Advisor Center. This link automatically opens the Advisee Student Center.</p>



The screenshot shows the 'Advisee's Student Center' search page. At the top, there is a breadcrumb trail: 'Main Menu > Student Services > Advisor Center'. Below this is the 'my.fscj.edu' header with navigation links for 'Employees', 'Resources', and 'Help Center'. The main content area is titled 'Advisee's Student Center' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button and a 'Search Criteria' dropdown menu. The search criteria include: ID (dropdown: begins with, text input, search icon), Campus ID (dropdown: begins with, text input), National ID (dropdown: begins with, text input), Last Name (dropdown: begins with, text input), and First Name (dropdown: begins with, text input). There is also a 'Case Sensitive' checkbox. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step	Action
2.	Enter the Empl ID of the student or enter the student’s Last Name and First Name. Remember that the drop down menu allows you to switch from “begins with” to “contains” if you have partial information. Other options are also available in the dropdown. National ID can be used if you need to enter the student’s SSN.
3.	Click the Search button. 
4.	Click on the drop down box in the Academics area, and select Advising Notes . Click 

Faculty Center | Advisor Center | Search | Learning Management

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

Advisee Student Center

Academics

[My Class Schedule](#)
[Shopping Cart](#)
[My Planner](#)

other academic... >>

You are not enrolled in classes.

Holds
No Holds.

To Do List
No To Do's.

Existing notes display and can be reviewed or a new note can be created.

Advising Notes

Ima Student

Use this page to view notes about the selected student. You can see and edit all of the notes for the student, regardless of who created the note or who (if anyone) the primary assignee (contact person) is.

[create a note](#)

Advising Note	Created By	Assigned To	Institution	Subject	Category	Subcategory	Note Status	Action Items	Last Updated
	AMY BURROWS	Amy Perkins	FSCJ1	Reviewed AAR - remaining courses TEST	Academic Advising	Graduation Check	Open	None	04/12/2017

Step	Action
5.	Click on the icon to review the existing note(s):
6.	Click the back button on your browser to return.

Advising Notes

Ima Student

Advising Note			
Institution	FSCJ1	Created On	04/12/2017
Category	Academic Advising	Created By	AMY BURROWS
Subcategory	Graduation Check	Note Status	Open
Assigned To	Amy Perkins	Advisee Access	No
Subject	Reviewed AAR - remaining courses TEST		

[update note](#) [notify advisee](#)

Note Items			
Note Item	Entered On	Entered By	Comment
2	04/12/2017	Amy Perkins	Student decided to enroll 3/4 time for Fall.
1	04/12/2017	Amy Perkins	Student needs 6 units Electives and 3 units Sci to graduate. She will register full-time for Fall.

Update note is an available option, which could be appropriate for a specific follow-up to a given note, but should not be the general practice. Since different advisors see the same students and FSCJ does not assign students to advisors, each session with a student should be documented through **Create a Note**.

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Ima Student

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[create a note](#)

Advising Note	Created By	Assigned To	Institution	Subject	Category	Subcategory	Note Status	Action Items	Last Updated
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7.	Click create a note .
8.	Complete required fields.

Advising Notes

Ima Student

Enter an advising note and click Submit when done.

Group Box

*Institution:

*Category: Academic Advising

*Subcategory: Graduation Check

*Assigned To: Amy Perkins

*Subject:

*Status:

*Advisee Access:

Normal | Font | Size | **B** | *I* | U | **S** | [List Icons] | [Align Icons] | [Color Icons]

Student needs 6 units Electives and 3 units Sci to graduate. She will register full-time for Fall.

Step	Action
9.	Select FSCJ1 as the Institution.
10.	Select the note Category: Enter 0 and the system will recognize the beginning of an Academic Advising note and provide the rest of the Category: OACAD ADV . Alternatively, enter the full Note Category or use the lookup icon for a list of categories.
11.	Based on the Advising Note Category selected, select the appropriate Subcategory.
12.	The Assigned To field will populate with the advisor's ID.
13.	Enter a brief Subject for the note.
14.	Under Status , leave the note Open.
15.	For Advisee Access , select Yes if the note should be available for the student to see in their student portal. Leave the field as No if the note is an internal note documenting an advising conversation.
16.	Complete the open text field.
17.	Click Submit . A reminder message populates. Click Yes if the note is completed as intended.

Message

Notes cannot be edited. Are you sure you would like to continue? Click Yes to continue or No to go back and make changes.
(0,0)

Step	Action
18.	Click Advisee Student Center in the breadcrumbs at the top of the screen to return. (At the time of this training guide, the Return button at the bottom of the screen is not working properly).

Transfer Institution and Transfer Major will be recorded in Advising Notes:

- In Orion, we entered those details on the Maintain Student Term Advisement (AV AM AV) screen. Students with reported Transfer Institution and Transfer major in Orion will have those records brought over into Advising Notes.
- In PeopleSoft, transfer institutions are designated as **Categories** within the Notes area and Majors are **Notes Subcategories**.
- All of the Florida public colleges/universities from both the Florida College System and the State University Systems are listed as Notes Categories.
- Other institutions previously reported by students are also listed.

Institutions are listed numerically by code, so we will use the **Description** field to search for the institution. Click the lookup icon to facilitate selection of the institution. Click on the **Description** field to enter part or all of the institution name. If entering a partial name, click the **Begins with** drop down and choose **contains**.

Select the **Transfer Major** from the **Notes Subcategory** options using a similar process.

Use the **update note** feature to report a change to a student's intended Transfer Institution and Transfer Major. We should maintain a single

IMPORTANT: Recording the intended Transfer Institution and Major is more than just a useful advising tool that facilitates communication with students and among staff. That information is also regularly reported to the State of Florida, and setting up the intended Transfer Institution and Major this way meets the needs of the State Reporting team. Your effort to continue to capture this information on our AA students ensures the accuracy of our reporting data.