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. 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. For example, "Advised student that AMH2010 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 procedures. 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.

Viewing and Adding Advising Notes

FSCJ Florida State College at Jacksonville

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/uaac/education/peoplesoft.php

Step	Action
1.	Begin by navigating to the **Advisee Student Center**: Click the **Main Menu > Campus Solutions > Self-Service >Advisor Center > Advisee Student Center** and search for the student.
2.	Click on the drop down box in the Academics area, and select **Advising Notes**. Click the double arrow.

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

Step	Action

3.	Click on the Advising Note icon [icon] to review the existing note(s).

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   Personalize | Find | View All | 🔄 | ⊞   First ◀ 1-2 of 2 ▶ Last

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. Each session with a student should be documented through **Create a Note**.

4.	Click the back button on your browser to return.
5.	Click **create a note.**

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

Personalize | Find | View All | 🔄 | ⊞   First ◀ 1 of 1 ▶ Last

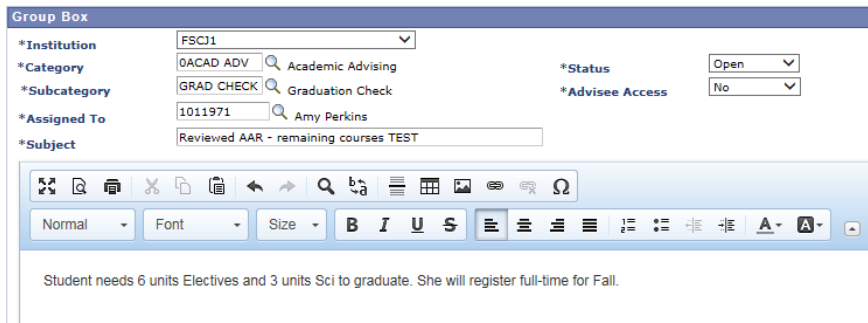| Advising Note	Created By	Assigned To	Institution	Subject	Category	Subcategory	Note Status	Action Items	Last Updated
[icon]	AMY BURROWS	Amy Perkins	FSCJ1	Reviewed AAR - remaining courses TEST	Academic Advising	Graduation Check	Open	None	04/12/2017

Step	Action
6.	Select **FSCJ1** as the Institution.
7.	Select the note Category (If you enter **0**, the system will pull up the Academic Advising Category: **0ACAD ADV**). Alternatively, you can click the magnifying glass for a list of categories.
8.	Select the appropriate Subcategory.
9.	The **Assigned To** field will populate with the advisor's ID.
10.	Enter a brief **Subject** for the note.
11.	Under **Status**, leave the note Open.

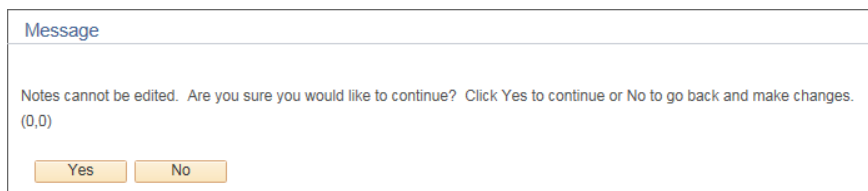| 12.	For **Advisee Access**, select **Yes** if the note should be available for the student to see in their student portal. Leave the field as No if the note is an internal note documenting an advising conversation.
13.	Enter the note in the open text field.

Step	Action
14.	Click **Submit.** A reminder message populates. Click **Yes** if the note is completed as intended.

Step	Action
15.	Click **Advisee Student Center** in the navigation at the top of the screen to return.

Transfer Institution and Transfer Major will be recorded in 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 it is best to use the **Description** field to search for the institution. Click the magnifying glass to select 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.

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.