

## Introduction – Advising Notes System

The Advising Request and Records System provide a way for Academic Advisors and others to:

- 1) Initiate update and correction requests on behalf of students
- 2) Document advising notes given to students through advising appointments, phone calls, emails, graduation reviews, etc. (**Available in Production on Friday, January 23, 2009**)

It is important to record in the students' folders what was discussed and recommended at advising appointments, through email, and during a walk-in appointment or hallway conversation. After you converse with a student in any way, type brief notes and/or copy emails in the Advisor Notes page about what was said relevant to his/her academic program and any recommendations you've made. Students sometimes fail to remember what you've told them and it helps if you can reflect back by looking at your notes. You can eliminate any potential problems about who said what, and expedite a student's graduation review if you keep good notes in the Advisor Notes page.

When you make recommendations about courses the student should take, forms the student should fill out, people the student should see, or any other specific items, type notes of what you advised in the Advisor Notes System. The notes should reflect your academic advice and **must not have personal observations about the student, his/her appearance, social life, confidential problems etc.**

### **IMPORTANT!**

- 1) **Your notes cannot be erased or updated.**
- 2) **All Advising Notes entered under this system are considered part of the student's record under FERPA regulations. Be aware that even if an advisor selects not to have a note available to the student through Self Service, the student may still file a request and be allowed to view all notes. FERPA regulations can be found at <http://www.csusm.edu/ferpa/>**

PeopleSoft's Advisor Notes feature allows your Advising Notes to be electronically accessible to students and Graduation Auditors in EMS without having to pull the student's hard-copy file sitting in an advising file room.

This ARR Business Process Guide gives an overview to using the Advising Notes feature for Academic Advisors and others to document advising information given to students through advising appointments, phone calls, emails, graduation reviews, etc.

## Accessing the Advising Notes System for Staff

From the Administrative menu, a user may search for and view an existing note, or create a new Note.

**Navigation:** *CSU SA Baseline* → *CSU Academic Advising* → *Advisor Requests and Records* → *Advising Notes*

### Advising Notes

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | **Add a New Value**

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**Search by:**  begins with

**Search** | [Advanced Search](#)

### Search Results

View All First 1-2 of 2 Last

Advisee ID	Display Name	Academic Career
<a href="#">AAAR00001</a>	Ellen Dean	Undergrad
<a href="#">AAAR00004</a>	Betty Lennox	Undergrad

[Find an Existing Value](#) | [Add a New Value](#)

Select the **Find an Existing Value** tab to view existing notes. Select the **Add a New Value** tab to add a new note for a student. You will be prompted for the student's ID and Academic Career.

## Creating a New Advising Note

### Advising Notes

Advisee ID Taylor Bell  
Career Undergraduate

Advisor Notes Find 1-3 of 3

Topic	ADVISING APPT	Advisor	Pamela Bell	Date	01/05/2009	
Show in Student Self-Service	<input checked="" type="checkbox"/>	For	5	Days	Send Note as Email to Student	<input checked="" type="checkbox"/>
ACADEMIC ADVISING INFORMATION: This advising note is simply a test to check-out the email feature and display of Advising information in the Degree Progress Report (created on 1/5/2009) to test if information gets displayed and to see if/when the student receives an						
Student Notified? <input checked="" type="checkbox"/> On 01/14/2009						

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Topic	E-ADVISOR	Advisor	Pamela Bell	Date	01/05/2009	
Show in Student Self-Service	<input checked="" type="checkbox"/>	For	15	Days	Send Note as Email to Student	<input checked="" type="checkbox"/>
ACADEMIC ADVISING INFORMATION: This is advising note #2 to further test this feature in PeopleSoft.						
Student Notified? <input checked="" type="checkbox"/> On 01/14/2009						

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Topic	GRAD REVIEW	Advisor	Pamela Bell	Date	01/05/2009	
Show in Student Self-Service	<input type="checkbox"/>	For		Days	Send Note as Email to Student	<input checked="" type="checkbox"/>
ACADEMIC ADVISING INFORMATION: This is advising note #3 to further test this feature in PeopleSoft.						
Student Notified? <input checked="" type="checkbox"/> On 01/14/2009						

### Steps for Processing

1. Click  to add another note **if an existing note is displayed.**
2. **TOPIC:** Select an appropriate Topic from the drop-down.
  - Advising Appt
  - E-Advisor
  - Faculty Appt
  - Grad Review
  - Walk-In Appt
3. **SHOW IN STUDENT SELF-SERVICE:** Select the *Show in Student Self-Service* box if you want this note to be available to the student through the Degree Progress Report. If you select this option, the selected note will be visible to the student immediately via a link on the Degree Progress component for the number of days YOU specify.
4. **DAYS:** If you have selected to have this note available through self-service, you must indicate the number of days the note should be available. (PS considers a blank box as a zero; Maximum # days is 999)

5. **SEND NOTE AS EMAIL TO STUDENT:** Select the *Send Note as Email to Student* box if you wish to have the contents of the note sent to the student as an email using the ARRC Email process. (As of January 2009, emails for Advising Notes are sent every evening.)

**Example of what student receives through Outlook:**

From: <[DEGREEAUDIT@csusm.edu](mailto:DEGREEAUDIT@csusm.edu)>  
 Date: Wed, Jan 14, 2009 at 9:00 AM  
 Subject: Advising Note from Pamela Bell Dated:1/5/2009  
 To: [bell052@cougars.csusm.edu](mailto:bell052@cougars.csusm.edu)

Dear Taylor Bell,  
 ACADEMIC ADVISING INFORMATION: This advising note is simply a test to check-out the email feature and display of Advising information in the Degree Progress Report (created on 1/5/2009) to test if information gets displayed and to see if/when the student receives an email.

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**When student REPLIES to the Advising Note Email it is directed to the person that created the Advising Note:**


From: Taylor Bell [mailto:[bell052@cougars.csusm.edu](mailto:bell052@cougars.csusm.edu)]  
 Sent: Wednesday, January 14, 2009 12:15 PM  
 To: Pamela Bell  
 Subject: Re: Advising Note from Pamela Bell Dated:1/5/2009

Thank you so much for your email. How kind of you to send it to me!!!

On Wed, Jan 14, 2009 at 12:03 PM, Taylor Bell <[bell052@cougars.csusm.edu](mailto:bell052@cougars.csusm.edu)> wrote:  
 forward.

----- Forwarded message -----  
 From: <[DEGREEAUDIT@csusm.edu](mailto:DEGREEAUDIT@csusm.edu)>  
 Date: Wed, Jan 14, 2009 at 9:00 AM  
 Subject: Advising Note from Pamela Bell Dated:1/5/2009  
 To: [bell052@cougars.csusm.edu](mailto:bell052@cougars.csusm.edu)

Dear Taylor Bell,  
 ACADEMIC ADVISING INFORMATION: This advising note is simply a test to check-out the email feature and display of Advising information in the Degree Progress Report (created on 1/5/2009) to test if information gets displayed and to see if/when the student receives an email.

6. Type the advising note in the empty box. Note: the text cannot be modified after the Advising Note is Saved.
7. **STUDENT NOTIFIED?** The *Student Notified* checkbox will be checked by the email process if an email is sent, along with the date of the email.
8. **Save Button** – Click on the  button in the **Administrative View** to save and exit the page.

## Accessing Advising Notes through Student Self Service

Students may access Advising Notes by clicking on the *Advisor Notes* hyperlink in the Degree Progress component. This **hyperlink is only available if there is a note for the student marked for display** in Self Service that has not exceeded the number of days indicated on the note.

[Degree Audit](#) [Course History](#) [External Credit](#) [Campus Tab](#)

**Mike Cameron** ID AAAR00005

Current Academic Objective		
	<a href="#">Requirement (Catalog) Term</a>	
Career:	Undergraduate	Fall 2001
Program:	Undergraduate Degree	Fall 1999
Plan:	Art - Studio Art BA	Fall 2003
<b>Expected Grad Term:</b>	Fall 2010	
<b>Graduation Status:</b>	Not Applied	

Current Academic Summary	
<b>Report Date:</b>	12/12/2008
<b>Last Term Registered:</b>	Fall 2006
<b>Academic Standing:</b>	Good Standing
<b>Overall GPA:</b>	2.981
<b>CSUSU GPA:</b>	2.672

[Printer Friendly Page](#)  
[Advisor Notes](#)

**Requirements Display View**

[Expand All](#) [Expand Unmet](#) [Collapse All](#)

**General Information**

Clicking on the hyperlink will take the student to another page where the note or notes can be viewed. Notes that exceed the # Days you specify to display to student will NOT appear in the Degree Progress Report.

### Advising Notes

**Advisee ID** AAAR00005 **Mike Cameron**  
**Career** Undergraduate

Advisor Notes	
<b>Advisor</b> Sherlock Holmes	<b>Date</b> 12/12/2008
Mike came in for a graduation check. He acknowledged that he needs to take STUFF 251 in the Fall of 2009 to be on track for graduation in Spring 2010. He may take an equivalent course over the summer in New York while he is on internship there. We found that CCNY's TOPIC 300 course would be equivalent.	

[Cancel](#)

The *Cancel* button returns the student to the Degree Progress component.