

Advising Notes

Introduction – Advising Notes System for Academic Advisors

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

It is important to record in the students' folders what was discussed and recommended at advising appointments, through email, 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 (and the student) 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.

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/>

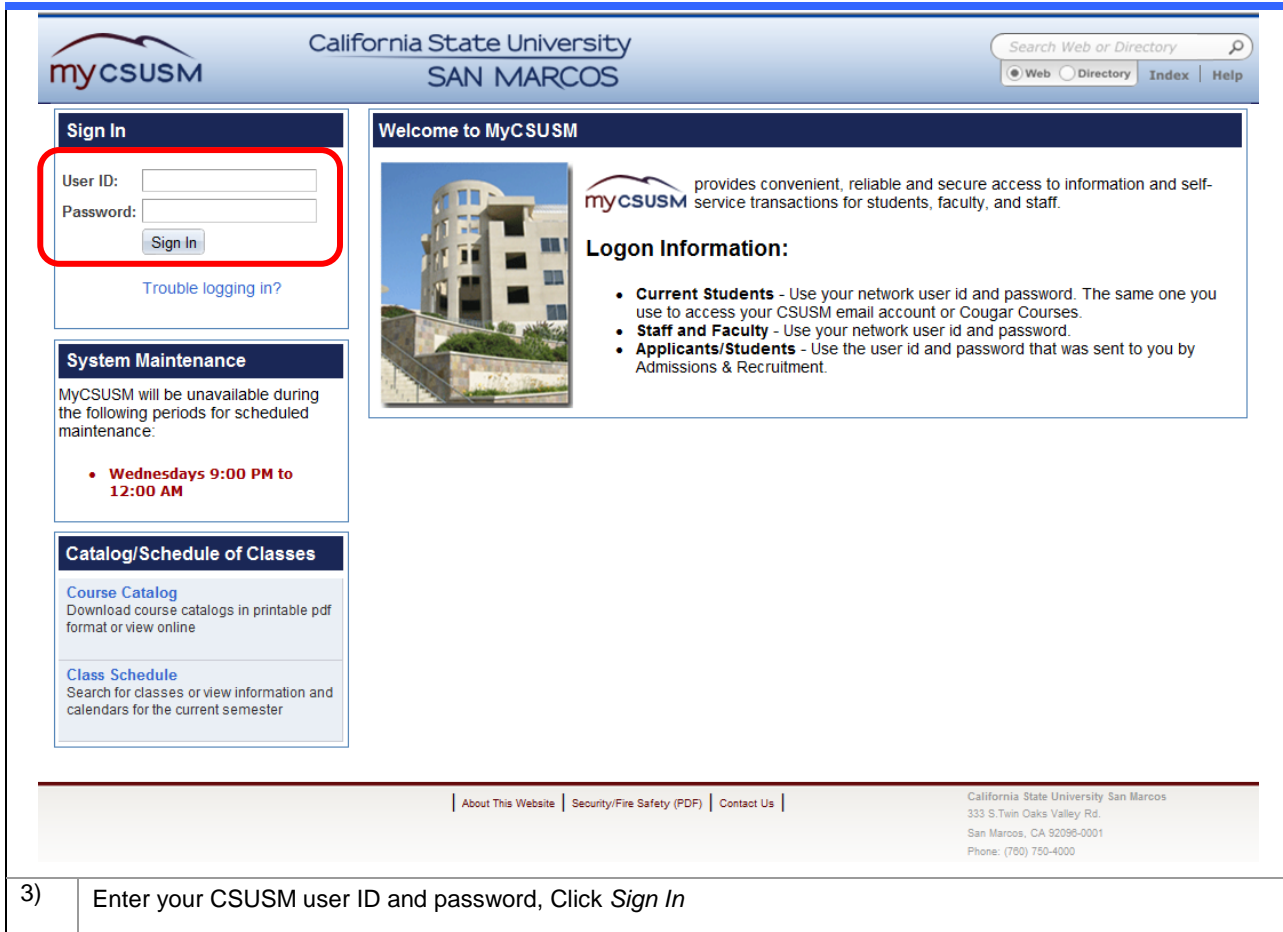
PeopleSoft's Advisor Notes feature allows your Advising Notes to be electronically accessible to students and Graduation Auditors in EMS without having to pull the student's hard-copy file sitting in an advising file room.

This guide will include the following topics:

- Navigate to the Faculty Center
 - Accessing the Advising Notes
 - Creating a New Advising Note
 - Send Advising Note As an Email
 - How Students Access Advising Notes
-

Navigate to PeopleSoft

<p>1) 2)</p>	 <p>1) Navigate to www.csusm.edu</p> <p>2) Select <i>MyCSUSM</i></p>
------------------	--



The screenshot shows the myCSUSM website interface. At the top, there is a search bar and navigation links for Web, Directory, Index, and Help. The main content area is divided into several sections:

- Sign In:** A section with a red box around the User ID and Password input fields, and a Sign In button. Below it is a link for "Trouble logging in?".
- Welcome to MyCSUSM:** A section with a photo of a building and text explaining the service. It includes "Logon Information:" with bullet points for Current Students, Staff and Faculty, and Applicants/Students.
- System Maintenance:** A section stating that MyCSUSM will be unavailable during scheduled maintenance, specifically on Wednesdays from 9:00 PM to 12:00 AM.
- Catalog/Schedule of Classes:** A section with links for Course Catalog and Class Schedule.

At the bottom of the page, there is a footer with links for "About This Website", "Security/Fire Safety (PDF)", and "Contact Us", along with contact information for California State University San Marcos.

3) Enter your CSUSM user ID and password, Click *Sign In*

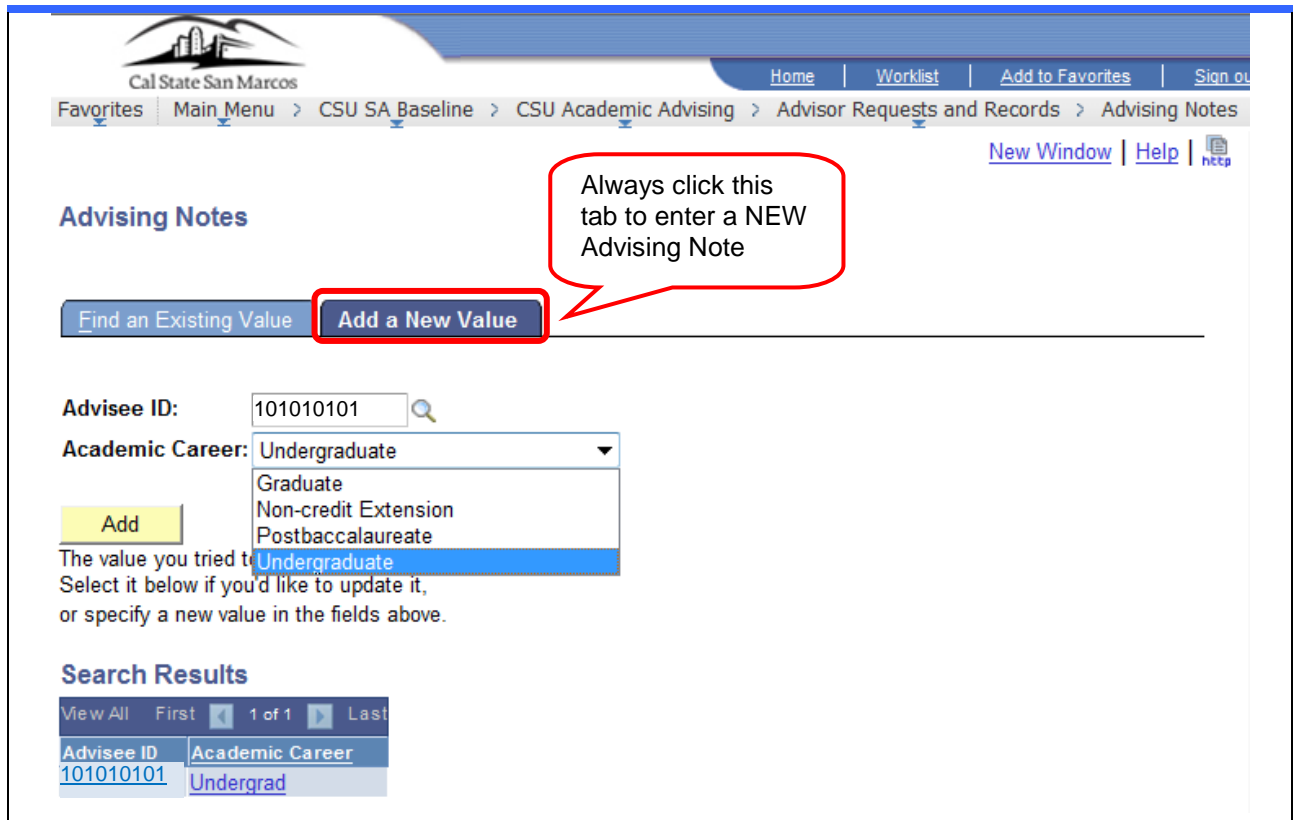


The screenshot shows the myCSUSM website interface after logging in. The top navigation bar includes "MyCSUSM Home" and "Sign out". The main content area is divided into several sections:

- Quick Links:** A section with a red arrow pointing to the "PeopleSoft Access" link. Other links include "CO Portal/CFS Access" and "Parking Request".
- My HR Resources:** A section with a red background and white text, containing links for "Timesheet", "Absence Report", and "Leave Balance Inquiry".
- MyCSUSM for Staff:** A section with a photo of staff at a computer and text explaining the service. It includes bullet points for "Quick Links", "My HR Resources", and "Manager Resources".
- News from CSUSM NewsCenter:** A section with a list of news items, including "Staff Appreciation Picnic - Jun. 27", "Event & Conference Services", and "Budget Update".

4) Select *PeopleSoft Access*


Accessing the Advising Notes



Cal State San Marcos


Home | Worklist | Add to Favorites | Sign out


Favorites | Main Menu > CSU SA Baseline > CSU Academic Advising > Advisor Requests and Records > Advising Notes

[New Window](#) | [Help](#) | 

Advising Notes

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

Advisee ID: 

Academic Career: 


Add

The value you tried to add is **Undergraduate**.
Select it below if you'd like to update it,
or specify a new value in the fields above.

Search Results

View All | First | 1 of 1 | Last

Advisee ID	Academic Career
101010101	Undergrad

1)	Navigate to Main Menu > CSU SA Baseline > CSU Academic Advising > Advisor Requests and Records > Advising Notes
2)	Select the <i>Find an Existing Value</i> tab to view existing notes. OR Select <i>Add a New Value</i> to add a NEW advising note
3)	Enter the student's ID number (EmplID) in the Advisee ID field
4)	Select the Academic Career.
	NOTE: <i>Academic Career = Graduate</i> is referring to students who have graduated or completed their program. <i>Postbaccalaureate</i> should be used for master students
5)	Select <i>Add</i> . (If already available, select the career you would like to add advising notes for.)

Creating a New Advising Note

Advising Notes

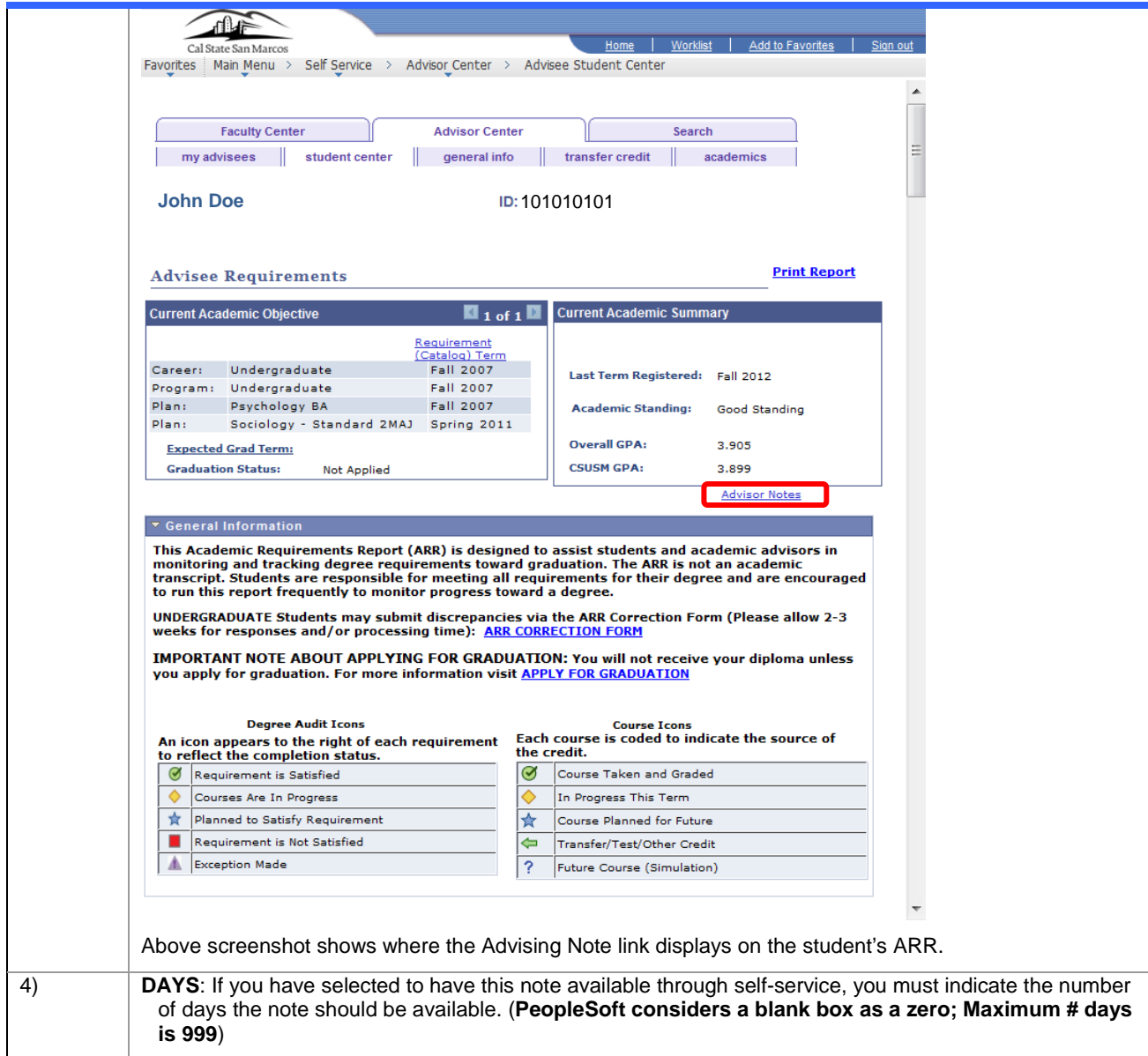
Advisee ID 101010101 John Doe
Career Undergraduate

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"/>
<p>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</p> <p style="text-align: right;">Student Notified? <input checked="" type="checkbox"/> On 01/14/2009</p>						
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"/>
<p>ACADEMIC ADVISING INFORMATION: This is advising note #2 to further test this feature in PeopleSoft.</p> <p style="text-align: right;">Student Notified? <input checked="" type="checkbox"/> On 01/14/2009</p>						
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"/>
<p>ACADEMIC ADVISING INFORMATION: This is advising note #3 to further test this feature in PeopleSoft.</p> <p style="text-align: right;">Student Notified? <input checked="" type="checkbox"/> On 01/14/2009</p>						

Click to add a NEW Advising Note

1)	Click the plus symbol to add another note if an existing note is displayed
2)	TOPIC: Select an appropriate Topic from the drop-down.
3)	SHOW IN STUDENT SELF-SERVICE: Select the <i>Show in Student Self-Service</i> box if you want this note to be available to the student immediately to view as a report from Self Service, and as a link on the Academic Requirements Report. (For the number of days specified – must be > 0)



The screenshot shows the 'Advising Student Center' for a student named John Doe (ID: 101010101). The page displays 'Advising Requirements' and 'Current Academic Summary'. A red box highlights the 'Advisor Notes' link in the 'Current Academic Summary' section.

Current Academic Objective (1 of 1)

	Requirement (Catalog)	Term
Career:	Undergraduate	Fall 2007
Program:	Undergraduate	Fall 2007
Plan:	Psychology BA	Fall 2007
Plan:	Sociology - Standard 2MAJ	Spring 2011

Expected Grad Term:
Graduation Status: Not Applied

Current Academic Summary

Last Term Registered: Fall 2012
Academic Standing: Good Standing
Overall GPA: 3.905
CSUSM GPA: 3.899

Advisor Notes

General Information

This Academic Requirements Report (ARR) is designed to assist students and academic advisors in monitoring and tracking degree requirements toward graduation. The ARR is not an academic transcript. Students are responsible for meeting all requirements for their degree and are encouraged to run this report frequently to monitor progress toward a degree.

UNDERGRADUATE Students may submit discrepancies via the ARR Correction Form (Please allow 2-3 weeks for responses and/or processing time): [ARR CORRECTION FORM](#)

IMPORTANT NOTE ABOUT APPLYING FOR GRADUATION: You will not receive your diploma unless you apply for graduation. For more information visit [APPLY FOR GRADUATION](#)

Degree Audit Icons	Course Icons
Requirement is Satisfied	Course Taken and Graded
Courses Are In Progress	In Progress This Term
Planned to Satisfy Requirement	Course Planned for Future
Requirement is Not Satisfied	Transfer/Test/Other Credit
Exception Made	Future Course (Simulation)

Above screenshot shows where the Advising Note link displays on the student's ARR.

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. (PeopleSoft considers a blank box as a zero; Maximum # days is 999)

Send Advising Note As an Email to Student

Advising Notes	
Advisee ID 101010101 John Doe Career Undergraduate	
Advisor Notes Find 1-3 of 3	
Topic ADVISING APPT Advisor Pamela Bell Date 01/05/2009	<input checked="" type="checkbox"/> Send Note as Email to Student
Show in Student Self-Service <input checked="" type="checkbox"/> For 5 Days	<input checked="" type="checkbox"/> Student Notified? On 01/14/2009
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	
Topic E-ADVISOR Advisor Pamela Bell Date 01/05/2009	<input checked="" type="checkbox"/> Send Note as Email to Student
Show in Student Self-Service <input checked="" type="checkbox"/> For 15 Days	<input checked="" type="checkbox"/> Student Notified? On 01/14/2009
ACADEMIC ADVISING INFORMATION: This is advising note #2 to further test this feature in PeopleSoft.	
Topic GRAD REVIEW Advisor Pamela Bell Date 01/05/2009	<input checked="" type="checkbox"/> Send Note as Email to Student
Show in Student Self-Service <input type="checkbox"/> For Days	<input checked="" type="checkbox"/> Student Notified? On 01/14/2009
ACADEMIC ADVISING INFORMATION: This is advising note #3 to further test this feature in PeopleSoft.	

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. (Emails are sent every evening.)

Example of what student receives through Outlook:

From: <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

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.

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]
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> wrote:
forward.

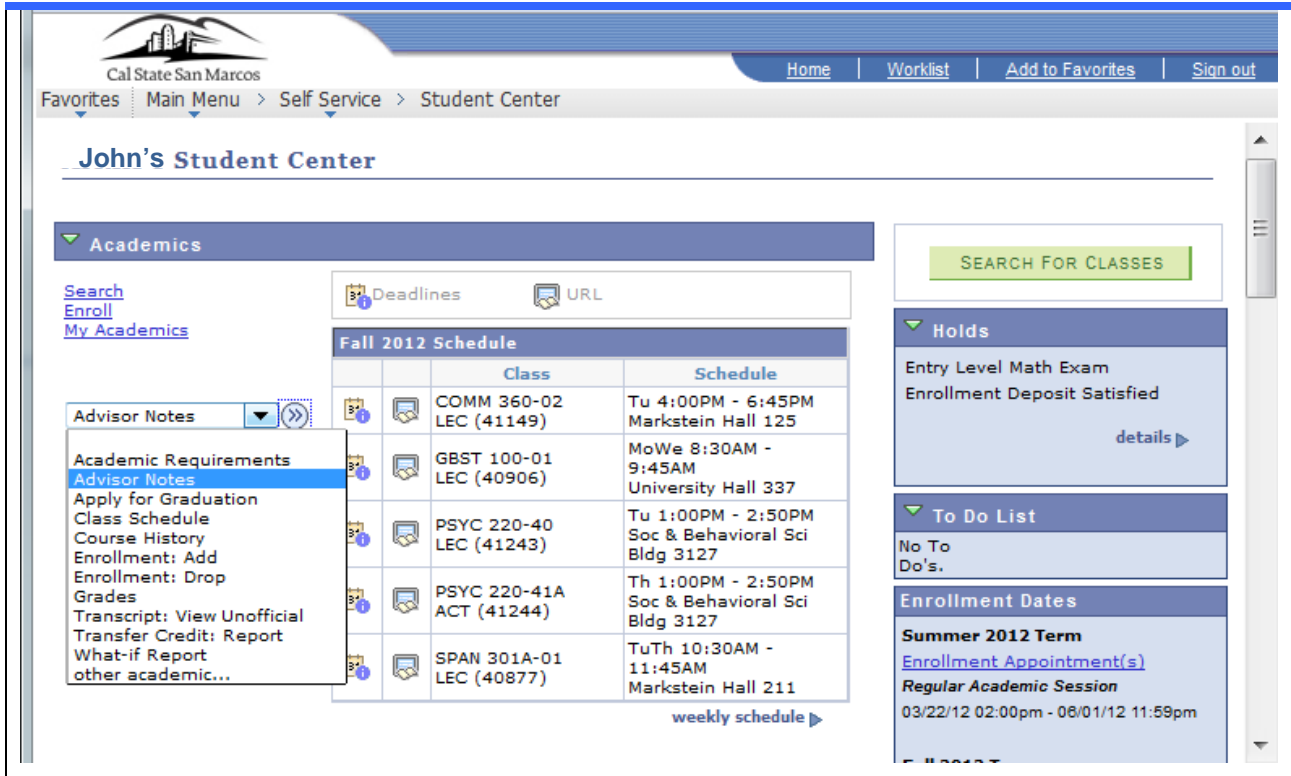
----- Forwarded message -----
From: <DEGREEAUDIT@csusm.edu>
Date: Wed, Jan 14, 2009 at 9:00 AM
Subject: Advising Note from Pamela Bell Dated:1/5/2009
To: bell052@cougars.csusm.edu

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 <i>Student Notified</i> checkbox will be checked by the email process if an email is sent, along with the date of the email. |
| 8) | Click Save button  at the bottom of the page. |

How Students View Advising Notes in Self Service

- | | |
|----|--|
| 1) | If the 'Show in Self-Service' box is checked, and a number of days to display has been entered when the Advising Note is created, the student will have access to view the Advising Note for the specified number of days through the Student Self Service Center. |
| 2) | The student can select the Advisor Notes option from the drop down Self Service menu , or run their Academic Requirements Report (from the drop down Self Service menu), and select the Advisor Notes link directly in the ARR . |



Cal State San Marcos

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Self Service > Student Center

John's Student Center

Academics

Search
Enroll
My Academics

Advisor Notes [dropdown]

- Academic Requirements
- Advisor Notes
- Apply for Graduation
- Class Schedule
- Course History
- Enrollment: Add
- Enrollment: Drop
- Grades
- Transcript: View Unofficial
- Transfer Credit: Report
- What-if Report
- other academic...

Deadlines URL

Fall 2012 Schedule			
	Class	Schedule	
8:41	COMM 360-02 LEC (41149)	Tu 4:00PM - 6:45PM Markstein Hall 125	
8:41	GBST 100-01 LEC (40906)	MoWe 8:30AM - 9:45AM University Hall 337	
8:41	PSYC 220-40 LEC (41243)	Tu 1:00PM - 2:50PM Soc & Behavioral Sci Bldg 3127	
8:41	PSYC 220-41A ACT (41244)	Th 1:00PM - 2:50PM Soc & Behavioral Sci Bldg 3127	
8:41	SPAN 301A-01 LEC (40877)	TuTh 10:30AM - 11:45AM Markstein Hall 211	

weekly schedule ▶

SEARCH FOR CLASSES

Holds

Entry Level Math Exam
Enrollment Deposit Satisfied

details ▶


To Do List

No To Do's.

Enrollment Dates

Summer 2012 Term

[Enrollment Appointment\(s\)](#)
Regular Academic Session
03/22/12 02:00pm - 06/01/12 11:59pm


Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Self Service > Advisor Center > Advisee Student Center

Faculty Center
Advisor Center
Search

my advisees
student center
general info
transfer credit
academics

John Doe ID: 101010101

Advisee Requirements [Print Report](#)

Current Academic Objective	1 of 1	Current Academic Summary																		
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="font-size: x-small;">Career:</td> <td style="font-size: x-small;">Undergraduate</td> <td style="font-size: x-small;">Fall 2007</td> </tr> <tr> <td style="font-size: x-small;">Program:</td> <td style="font-size: x-small;">Undergraduate</td> <td style="font-size: x-small;">Fall 2007</td> </tr> <tr> <td style="font-size: x-small;">Plan:</td> <td style="font-size: x-small;">Psychology BA</td> <td style="font-size: x-small;">Fall 2007</td> </tr> <tr> <td style="font-size: x-small;">Plan:</td> <td style="font-size: x-small;">Sociology - Standard 2MAJ</td> <td style="font-size: x-small;">Spring 2011</td> </tr> <tr> <td colspan="3" style="font-size: x-small;"><u>Expected Grad Term:</u></td> </tr> <tr> <td style="font-size: x-small;">Graduation Status:</td> <td colspan="2" style="font-size: x-small;">Not Applied</td> </tr> </table>	Career:	Undergraduate	Fall 2007	Program:	Undergraduate	Fall 2007	Plan:	Psychology BA	Fall 2007	Plan:	Sociology - Standard 2MAJ	Spring 2011	<u>Expected Grad Term:</u>			Graduation Status:	Not Applied		Requirement (Catalog) Term	<p style="font-size: x-small;">Last Term Registered: Fall 2012</p> <p style="font-size: x-small;">Academic Standing: Good Standing</p> <p style="font-size: x-small;">Overall GPA: 3.905</p> <p style="font-size: x-small;">CSUSM GPA: 3.899</p> <p style="text-align: center; font-size: x-small;">Advisor Notes</p>
Career:	Undergraduate	Fall 2007																		
Program:	Undergraduate	Fall 2007																		
Plan:	Psychology BA	Fall 2007																		
Plan:	Sociology - Standard 2MAJ	Spring 2011																		
<u>Expected Grad Term:</u>																				
Graduation Status:	Not Applied																			

General Information

This Academic Requirements Report (ARR) is designed to assist students and academic advisors in monitoring and tracking degree requirements toward graduation. The ARR is not an academic transcript. Students are responsible for meeting all requirements for their degree and are encouraged to run this report frequently to monitor progress toward a degree.

UNDERGRADUATE Students may submit discrepancies via the ARR Correction Form (Please allow 2-3 weeks for responses and/or processing time): [ARR CORRECTION FORM](#)

IMPORTANT NOTE ABOUT APPLYING FOR GRADUATION: You will not receive your diploma unless you apply for graduation. For more information visit [APPLY FOR GRADUATION](#)

Degree Audit Icons

An icon appears to the right of each requirement to reflect the completion status.

✔	Requirement is Satisfied
◇	Courses Are In Progress
★	Planned to Satisfy Requirement
❌	Requirement is Not Satisfied
⚠	Exception Made

Course Icons

Each course is coded to indicate the source of the credit.

✔	Course Taken and Graded
◇	In Progress This Term
★	Course Planned for Future
←	Transfer/Test/Other Credit
?	Future Course (Simulation)