

Guide to Advising Notes – for Faculty

Sept 2020, v 2

<u>Contents</u>	<u>Page</u>
What is an advising note? Why are they helpful?	2
Entering advising notes	2
Your advisee list (#4)	4
Required vs. optional fields (#7)	5
Categories & subcategories (#8)	5
Note Item (text field entry) (#9)	6
Attachments (#10)	6
Action Items (#11)	7
Reviewing previously entered advising notes	8
Reviewing your open notes	9
Advising notes for students who aren't your advisees	10
Send a message to your advisees	12
Helpful queries	14
Sample entries	14

What is an Advising Note? Why are they helpful?

What are they? Advising notes are comments and notes on interactions you have had with your advisees. They allow you to enter remarks and observations that can be easily stored and accessed at a future time – this enables you to remember what you have previously advised students to do, and what concerns you may have previously noted about student progress. Each note is intended to be applicable for one interaction/advising session. You can enter a quick note each time you advise a student (rather than editing or re-writing an existing one) to preserve the history of your notes.

Why should you use them? This is a tool to help make you a better advisor. It will help you remember what you've previously told students, and when you told them. You'll be able to keep track of recommendations you have given students for which classes they should take or how to progress toward their degree (e.g., "recommended that student should take Quantitative Research Methods next time it is offered; may substitute with Advanced Statistics if available" or "student agreed that they will sign up for the ____ qualifying exam in January"). You'll be able to access your notes and notes from other advisors at CGU before your next advising session to ensure that the student is remaining on track to graduate. This gives you a quick and accurate reminder rather than having to spend a time in your next advising session to catch up on what was said last time. This will also help yearly departmental student reviews for fellowship consideration by being easily able to assess which students are regularly meeting with advisors to progress in their degree.

You can use Advising Notes to send a message to one or several of your advisees all at once. This can be very helpful to remind students to set up advising appointments, or to notify them all at once that you will be on sabbatical, etc.

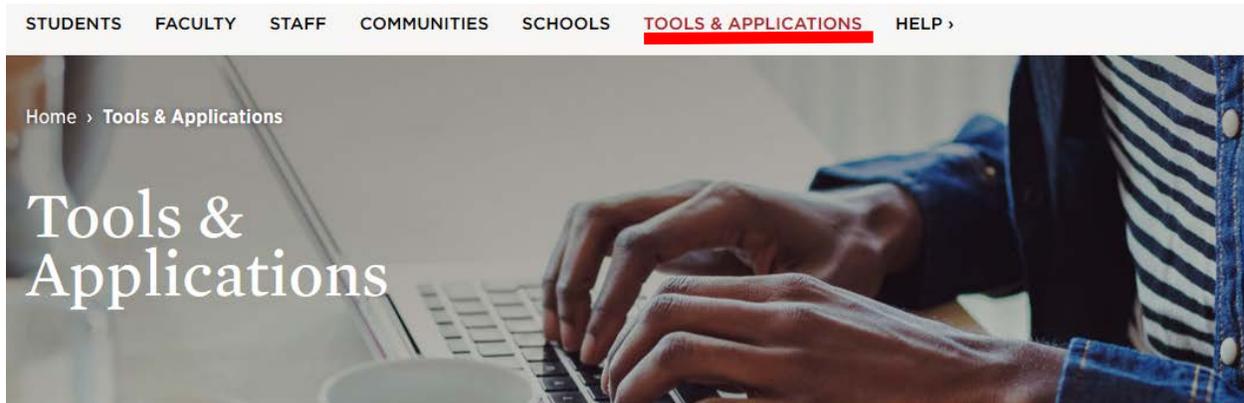
Entering a note can be a quick and simple process or a more involved one, depending on how much information you want to record in each note. This guide will show you several options, but we recommend that each department determine some standards they wish to use for Advising Note entry, and that all faculty in the department agree to follow those standards.

Important note: all staff and faculty with PeopleSoft access have the ability to view advising notes, and these notes are legally part of each student's educational record – *anything that would be considered confidential should not be recorded here*. For example, if a student self-discloses a learning disability to you, do not enter that "student informed me they have ADHD and will be requesting accommodations through the disability services office" because you could inadvertently disclose the student's disability status to other faculty or staff members without their permission. This is also true if a student discloses personal challenges they are dealing with, health-related information, or grades in other classes. Students do not currently have the ability to view these notes in their own portal, but under federal FERPA regulations, students have the legal right to request a formal review of all education records, which include these advising notes. Additionally, advising notes must be disclosed in cases of legally issued subpoenas. Take care to only enter information about the specific student whose note you are writing (do not include a name of a different student in someone's advising note). A good rule of thumb for what constitutes appropriate comments would be whether you would feel comfortable telling the student and their grandparents in person exactly what you have written – if you would hesitate to share it in any way, find another way to say it.

Some examples have been provided at the end of this guide showing good and poor examples of what to include.

Entering Advising Notes

1. Begin by logging on to PeopleSoft, CGU's student information system.
 - go to the log on screen through <https://my.cgu.edu> > Tools & Applications, *or*
 - simply navigate to <https://my.cgu.edu/applications/>, then PeopleSoft.



Most applications require CGU network authentication to view.

Academic & Productivity Apps

Office 365

Access the suite of Office 365 apps, including Word, PowerPoint, Excel, and more.

Administrative Apps

PeopleSoft

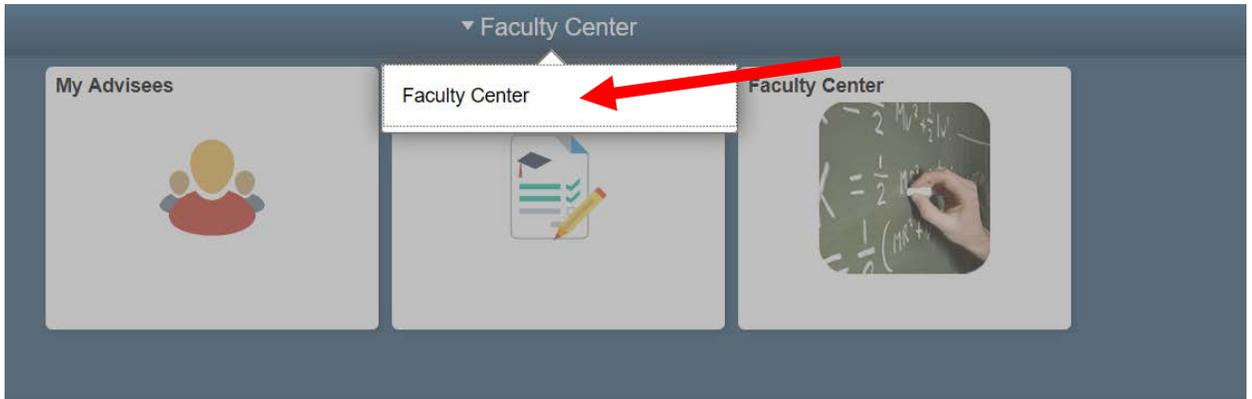
Students can use PeopleSoft to register for classes, pay their bill, view financial aid, check grades, see an unofficial transcript, and update their personal information.

- If you know your login information, enter it in the appropriate fields
- If you have difficulty with this, contact helpdesk@cgu.edu or call (909) 621-8174 (x18174 from on-campus).
- A new tab will open with the Student Information System (PeopleSoft) Faculty Center tile

2. Confirm that you are viewing the **Faculty Center**.



Department chairs, school deans, and some others with administrative roles may see Central Staff Homepage and will need to select Faculty Center from the top navigation drop down menu.



3. Select the **My Advisees** tile.



4. All students for whom you are listed as an advisor are displayed here. Students who have withdrawn from CGU are not shown in this list, nor are students you may provide advice to informally. Academic departments control which students are assigned to which advisor and update student advisors over time; if you think your list is incomplete or incorrect, please contact your department's program coordinator. Departments can add faculty members as advisors in different roles, so even if you are not the "official" advisor you can still be listed as a different type of advisor, such as Qualifying Exam Committee Member, Research Advisor, etc.

Faculty Center My Advisees

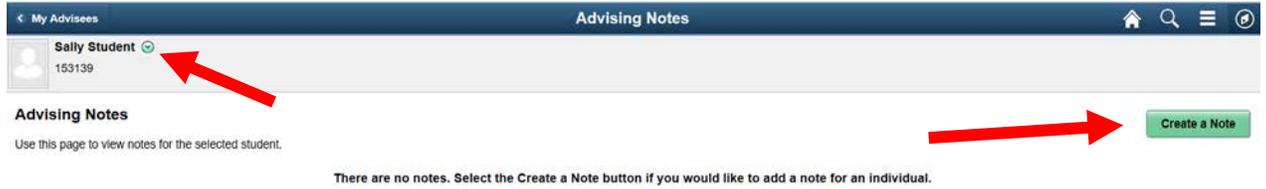
My Advisees 6 rows

Notify	Name / ID	Committee	Email	Advising Notes
<input type="checkbox"/>	[Redacted]		[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]		[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]		[Redacted]	[Redacted]
<input type="checkbox"/>	 Sally Student 153139		Sally@email.com	[Redacted]
<input type="checkbox"/>	 Devine Doolittle 153140		blahblah@doolittleemail.com	[Redacted]
<input type="checkbox"/>	 Carl Claremont 153141		carl.claremont@cgu.edu	[Redacted]

5. When you'd like to enter an advising note or view something previously written for a student, simply select the note icon (📄) next to their name, under the Advising Notes column.



6. From here, Create a Note, or change to another advisee with the green circle option button



7. This is the page where you will actually create the note. Some fields are required for entry (and are designated with an asterisk), and other are optional.

Required fields:

Category (see #8 below)

Subcategory (see #8 below)

Subject (see #9 below)

Optional fields:

Status

Contact Type

Note Items

Action Items

Attachments

8. CGU has created a number of categories and subcategories that are available for use, but has created a streamlined process to facilitate easy entry by faculty. You may enter a note for any category for which you have access (E.g., you may enter a note under category Financial Aid and subcategory RA/TA Award rather than that category being limited to use by the Financial Aid office).

The easiest option for faculty is to select:

Category = Advising

Subcategory = 20XX-20XX academic year

Advising Notes

Enter an advising note and select Submit when done.

▼ **Create Advising Note**

Institution Claremont Graduate University

*Category

*Subcategory

*Subject



9. Subject is a required field. This can be anything that is useful to you, and should briefly state what the note is referring to. **SUGGESTION:** Start out the subject by entering the Year and Term (E.g., 2021 Fall or 2021FA) to provide yourself with an easy way to quickly see what your notes are referring to. Some appropriate subject examples might be “2021SP-Course planning” or “2021FA-Qual exam prep” or 2021SU-APSA conference travel plans”. Subject is a field that can be queried against, so it’s very helpful to be consistent with how you enter your subjects, as it makes locating all notes with similar subjects very easy.

Advising Notes

Enter an advising note and select Submit when done.

▼ **Create Advising Note**

Institution Claremont Graduate University

*Category

*Subcategory

*Subject

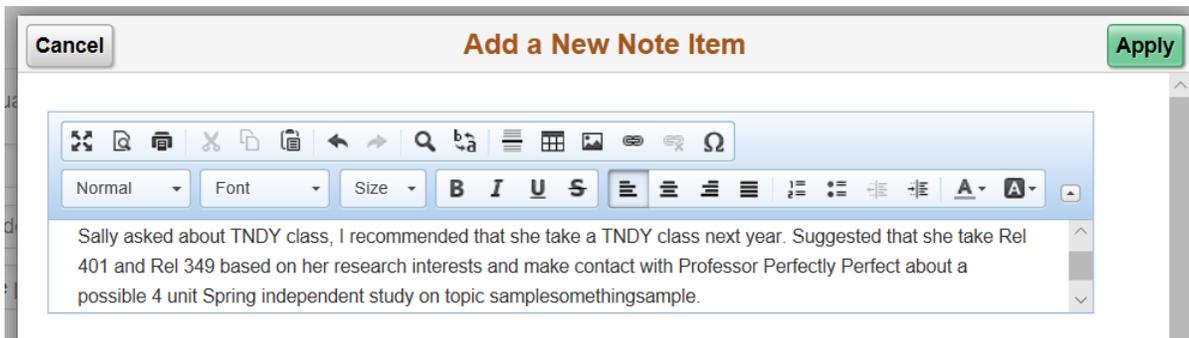


10. Once you have entered the Category, Subcategory, and Subject, you have entered the minimum required to save a note. From here, you can close out the note by clicking the green submit button (in the upper right), or you can add additional context.

Status: The status of the note is automatically *Open*. If no further follow-up is needed on this note, you can complete it by changing the status from to *Closed*. *Open* status means that there is work to be done for this particular situation. If status is *Closed*, the assumption is that nothing further is needed.

Status **Closed**

Note Item: This is the main field for entering comments. Start by clicking Add Note Item and a window will pop up for text entry. When you finish entering the comments, click the Apply button. This window allows you to cut and paste from other text, add images, add links to somewhere on the web, or add emphasis with bold, italics, underlines, etc. You can also print the contents of the Note Item field by selecting the printer () icon.



Once you have entered text in the Note Item field, it will show who entered the text and what day it was entered:

▼ **Note Items**

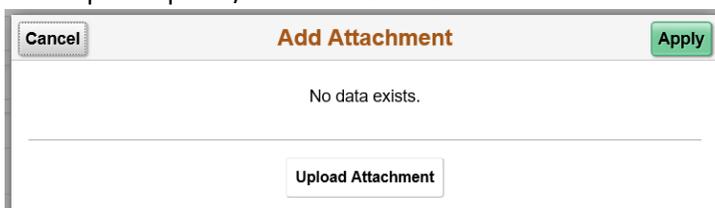
Note Item	Entered By	Entered On	Comment
1	[Redacted]	09/11/2020	Sally asked about TNDY class, I recommended that she take a TNDY class next year. Suggested that she take Rel 401 and Rel 349 based on her research interests and make contact with Professor Perfectly Perfect about a possible 4 unit Spring independent study on topic samplesomethingsample.

What should you enter in the Note Item field?

Each recorded student/staff interaction should be entered as a single note. Make your best effort to limit the content of the note to one area, and enter multiple notes if needed for the same student. Why? Because when searching through the list of existing notes it is MUCH easier to track volume and repeat advising if all the interactions are grouped together. So if you have a conversation with a student about two issues (Ex., a possible degree change and also a possible leave of absence), enter one note for one category and a second note for the second category. You can copy/paste the note comments as needed.

Contact Type: This can be used to select the type of interaction you had with the student (Phone call, email, office visit, etc.)

11. Attachments can be added (such as advising sheets used by your department, or a syllabus for an independent study class) by clicking the Add Attachment button at the bottom, and then following the steps to upload/attach a document.



12. Action Items can remind you (or anyone viewing the note) what course of action was decided upon, however these *will not be viewable by the students in their student portal*. You may wish to use Action Items to remind yourself to follow up on something or to confirm with someone that something has been completed. To add an Action Item, select the Add Action Item button at the bottom and then enter as much information as is relevant.

▼ Action Items

Action Item	Entered On	Description	Status	Due Date
1	09/11/2020	Complete Enrollment Contract for independent study class	Incomplete	02/05/2021

13. Click the Submit button (upper right) once you have completed entering all of your information:

Sally Student
153139

Advising Notes
Enter an advising note and select Submit when done.

▼ Create Advising Note

Institution: Claremont Graduate University
 *Category: Advising
 *Subcategory: 2020-2021 academic year
 *Subject: 2021SP-Course planning

Status: Closed
 Advisee Access: No
 Contact Type: In-Person

▼ Note Items

Note Item	Entered By	Entered On	Comment
1	[Redacted]	09/11/2020	Sally asked about TNDY class. I recommended that she take a TNDY class next year. Suggested that she take Rel 401 and Rel 349 based on her research interests and make contact with Professor Perfectly Perfect about a possible 4 unit Spring Independent study on topic samplesomethingsample.

▼ Action Items

Action Item	Entered On	Description	Status	Due Date
1	09/11/2020	Complete Enrollment Contract for independent study class	Incomplete	02/05/2021

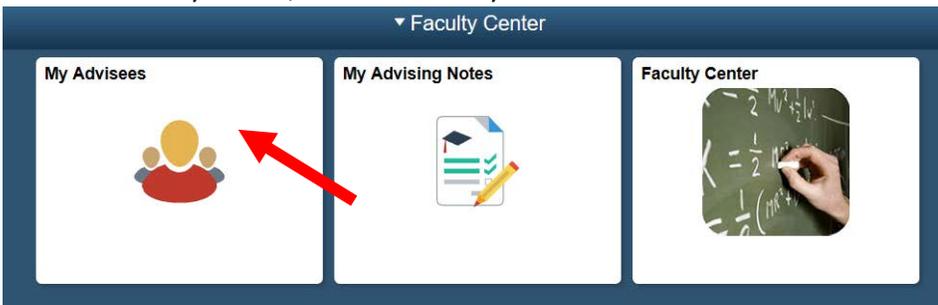
▼ Attachments
No data exists.
Add Attachment

Congratulations, you're done entering an Advising Note! You may click on the Home (🏠) icon in the upper right corner to return to the Faculty Center.



Reviewing previously entered Advising Notes

1. From the Faculty Center, return to the My Advisees tile:



2. and again click the note icon next to the student you wish to review:



3. Now you can see a brief synopsis of the note, as well as the status of the note overall, and if there are any pending action items:

Advising Notes

Use this page to view notes for the selected student.

View Note	Subject	Category / Subcategory	Contact Type	Created By / Assigned To	Institution	Status / Action Item	Created On / Last Updated
	2021SP-Course planning	Advising 2020-2021 academic year	In-Person		Claremont Graduate University	Closed Pending	09/11/2020 09/11/2020

To edit an existing note, click the note icon on the left hand side

Advising Notes

Use this page to view notes for the selected student.

View Note	Subject	Category / Subcategory
	2021SP-Course planning	Advising 2020-2021 academic year

Or to add a new note, click the Create a Note button on the upper right side

Created On / Last Updated	Update Note
09/11/2020	
09/11/2020	

Reviewing your open notes

1. From the Faculty Center, click the My Advising Notes tile



2. Use the filters on the left to find any open notes, or any notes that were created within a specific date range, etc. To open the note, simply click on the View Note icon, or click the pencil under the Update Note column. Two filters are automatically applied each time this page has opened. Open notes only ("OP") and notes created/updated in the last 7 days ("Last Updated 7 Days"). To remove those filters, simply click the delete filter (✖) icon.

You can easily view if there are open notes or action items that are overdue.

My Advising Notes
This page displays advising notes created by or assigned to you. Use the facet filters, as needed, to narrow your search results.

OP Last Updated 7 Days Clear All

View Note	Advisee	Subject	Category / Subcategory	Created By / Assigned To	Institution	Status / Action Item	Created On / Last Updated	Update Note
		2020FA TEST open note	Advising 2020-2021 academic year		Claremont Graduate University	Open Overdue	09/08/2020 09/08/2020	
	Norah Alhartzl	Test Note	General Academic Cross Registration		Claremont Graduate University	Open None	09/08/2020 09/08/2020	

Advising notes for students who aren't your advisees

Viewing advising notes for students not in your advisee list is done through a different route. Start by clicking the Navigation Icon (1), then Navigator (2), then Academic Advisement (3), then Student Advisement (4).

Enter either the ID or the student's last and first name, and click Search. To ensure that spelling errors don't prevent you from locating the student record you are looking for, enter just the first few letters of the last and first name.

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](#)

Search Criteria

Academic Institution begins with

 ID begins with

Advising Note ID begins with

Last Name begins with 

First Name begins with 

Academic Advisor begins with

Created By begins with

Note Category begins with

Note Subcategory begins with

Case Sensitive



Though the display will look slightly different from the newer “fluid” style described above, the same information will be available to see. Take note that if there are multiple comments entered, there will be multiple rows available and you can click View All to see them. To add a new comment to an existing note, simply click the plus button. Each comment is date/time stamped.

On this screen you can also edit the status of action items (or request that departmental staff update the status if/when something is received), add or view attachments, etc. Remember to click Save when finished.

Advising Notes

Sally Student 153139
Academic Institution CGRAD Claremont Graduate University
Note ID 00001

Advising Note

*Category

*Subcategory

*Advisee Access

*Status Contact Type

*Subject

Note Items Find | View All | First 1 of 2 Last

Note Item	1	Created	09/11/2020 11:56:12AM		
Comment	<p>Sally asked about TNDY class, I recommended that she take a TNDY class next year. Suggested that she take Rel 401 and Rel 349 based on her research interests and make contact with Professor Perfectly Perfect about a possible 4 unit Spring independent study on topic samplesomethingsample.</p>				<input type="button" value="Edit"/>

Action Items Personalize | Find | View All | First 1 of 1 Last

Action Item Sequence	Entered On	*Description	*Action Item Status	*Due Date	
1	09/14/2020	Complete Enrollment Contract for independent	<input type="text" value="Incomplete"/>	02/05/2021 <input type="button" value="Calendar"/>	<input type="button" value="Trash"/>

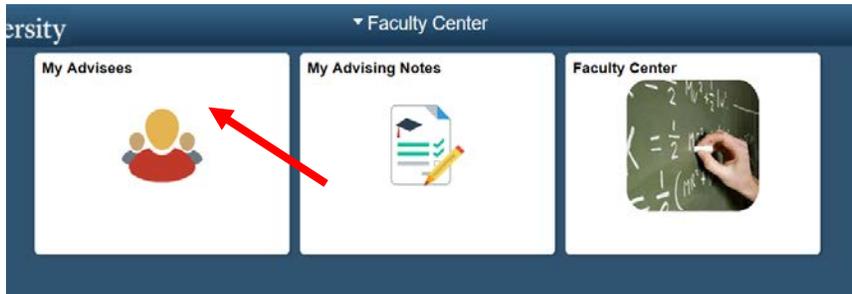
Attachments

Attached File	Description
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Send a message to your advisees

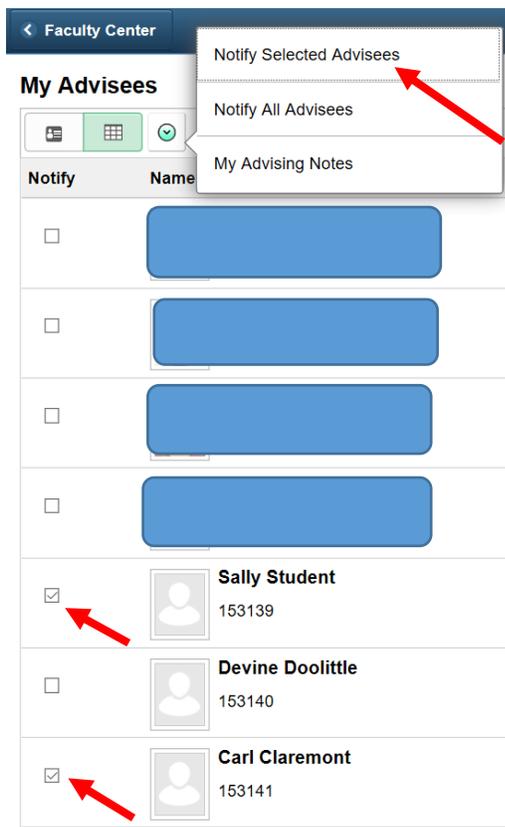
Start by selecting the My Advisees tile



If you want to send a message to all advisees, click the green circle in the upper left corner and then select Notify All Advisees. Otherwise, first check the box next to the name of the advisee(s) you want to send a message to and select Notify Selected Advisees



My Advisees



A pop-up window will appear where you can enter the message you would like to send. You can add a CC to a departmental staff member or another faculty member. Once done writing, click Send.

Cancel **Send Notification** **Send**

Type e-mail addresses in the To, CC or BCC fields using a comma as a separator.

Notification from [blue box]

From [blue box]

To [blue box]

CC [empty]

BCC Sally@email.com, carl.claremont@cgu.edu

Subject <From the desk of [blue box] >

Message Text **Your message here**

Helpful Queries

If you needed assistance running either of these queries please contact your program coordinator or the Registrar's Office.

SR_ADVISING_NOTES – to show all advising notes entered. Helpful to run queries and sort by category or subcategory, or to find all notes that begin with a specific term in the subject line.

SR_ADVISING_NOTES_CREATED_BY – to show all advising notes entered by a specific individual. Helpful to check on the status of your own notes; requires you to enter the first portion of your PeopleSoft username in the prompt (generally the first few letters of your last name).

Sample Entries

GOOD: Student will be preparing to take their qualifying exam in Spring 2021. Discussed how to prepare and campus resources available

POOR: Student will be contacting Student Disability Office to inquire about testing accommodations
Why avoid this? It shares a student's private health information without student's direct consent and is a violation of federal HIPAA regulations.

GOOD: Student shared some information regarding personal/home life challenges; I referred them to campus resources that might be useful to them

POOR: Student told me that they had been kicked out of their house and had been sleeping on a friend's couch, which is why their classwork had been suffering.

Why avoid this? This shared personal and private details about a student's life that they probably don't want others knowing about.

GOOD: Student is considering an independent study on topic _____. I told them I would approve and told them the form they will need to submit for this

POOR: Student told me they wanted to work with Carl Claremont and Sally Student on an independent study about _____. I told them I would approve and told them the form they will need

Why avoid this? You cannot include names or education records for other students. Doing so violates federal student privacy expectations (FERPA regulations) for Carl and Sally.