



Advising Summary Reports & Notes

This guide outlines the primary differences between Advising Summary Reports and Notes in the EAB SSC Campus platform. It also provides an overview of how to navigate to each functionality and utilize their respective features.

Before we explore these functionalities, however, please read below the recommendations for utilizing Advising Summary Reports and Notes. These recommendations serve as best practices for our end-users at Cal State LA.

? When do you use Advising Summary Reports?

- To record the primary details from an advising exchange/interaction with a student, whether it transpires in-person, virtually, or via email or phone. These primary details may include course/schedule recommendations you made to a student; references to campus resources or services; discussions about a student's graduation timeline; and similar details.
- To record the logistical details associated with an advising exchange/interaction (e.g., day, time, attendees, etc.) as well as to attach documentation relevant to an advising exchange/interaction (e.g., a curricular roadmap) that can be appended to the summary.

NOTE: Advising Summary Reports can be viewed by you and other campus advisors who have access to that student's profile. As an educational record, these reports are subject to compliance with FERPA guidelines, so please exercise professionalism and discernment in determining which details of an advising exchange/interaction to record. Highly sensitive or strictly confidential information should not be recorded in a summary.

? When do you use Notes?

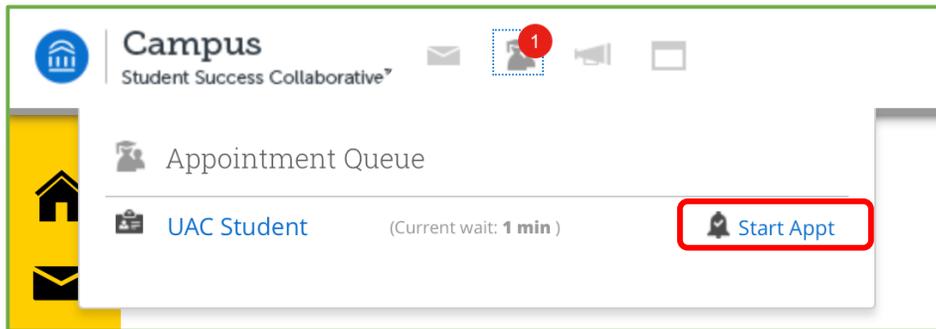
- To record one-off records or follow-ups from quick conversations with a student NOT associated with an advising exchange/interaction (e.g., a note that the student will be abroad during a given term).
- To provide an easy reference to documentation (e.g., a curricular roadmap) NOT associated with an advising exchange/interaction that can be attached to the note and accessed via the student's profile.

NOTE: The same professionalism and discernment required of Advising Summary Reports applies to your use of the Notes functionality, including compliance with FERPA guidelines. Furthermore, we recommend limited use of the Notes functionality, as details regarding an interaction with a student should generally be associated with a date of the exchange, which can only be captured in an Advising Summary Report.

Please continue your exploration of these functionalities by reading the guidelines to follow...

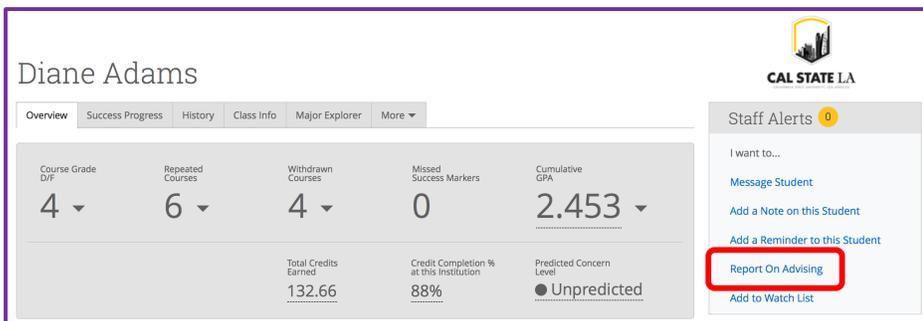
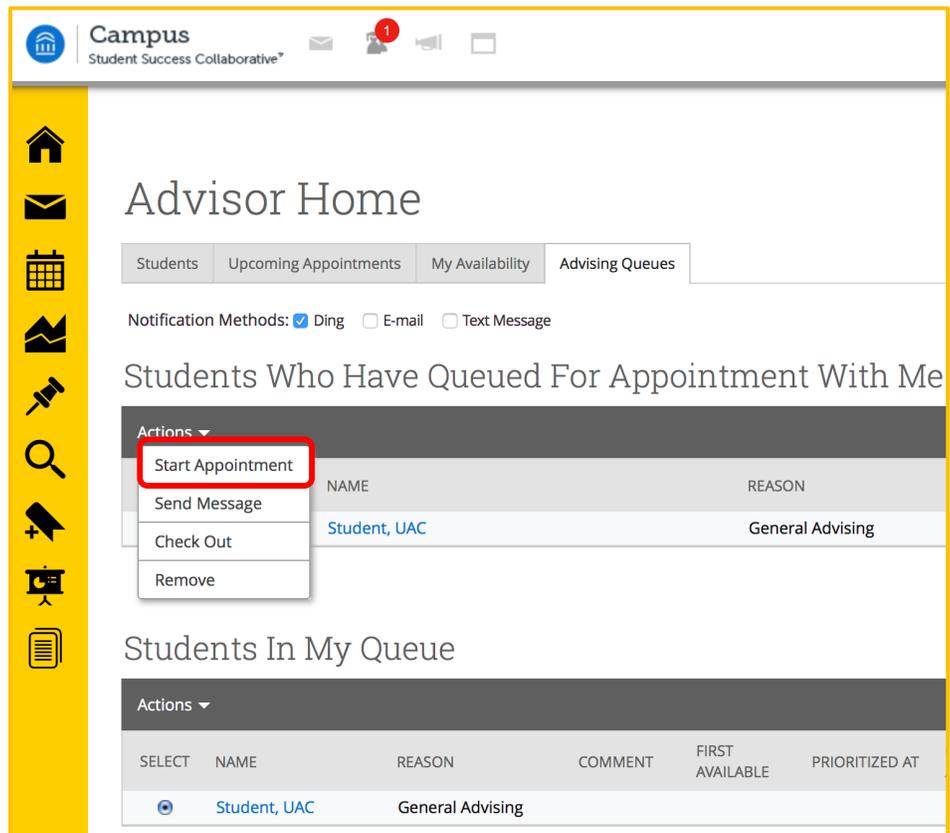


For those with access to EAB SSC's appointment scheduling, an Advising Summary Report automatically appears when you begin an advising appointment. See below for the ways you can start an appointment and, in turn, launch an Advising Summary Report.



When your student is checked in for his/her appointment at the front desk, you can start the appointment from the **Appointment Queue** icon in the top navigation bar.

You may also choose to start your appointment from either of the lists contained under the **Advising Queues** tab: *Students Who Have Queued For Appointment With Me* or *Students In My Queue*.



You may also create Advising Summary Reports directly from a student's profile. In the right-hand navigation bar of a student's profile, you may click on the **Report on Advising** link.

NOTE: When creating an Advising Summary Report from a student's profile (rather than from starting an existing appointment), you are, in effect, retroactively creating an appointment that is associated with the advising exchange.

Whether you launch an Advising Summary Report by starting an appointment or by “Reporting on Advising” through a student’s profile, you will see the same window below with the exception of one difference: the pre-populated **Appointment** field only appears when you launch an Advising Summary Report by starting an appointment. Of note, Advising Summary Reports are NOT accessible to students.

To create as accurate of an Advising Summary Report as possible, you should specify the reason for the advising exchange/interaction in the **Reason** field. The report will automatically populate with the reason code already associated with the advising exchange, but you can modify this. These reason codes are captured in the platform’s data analytics, so we encourage you to be as specific as possible when inputting the reasons for your advising exchanges/interactions.

You can select a **Meeting Type** from the available drop-down menu: Email, Phone, Virtual, In-person, or Group.

If the advising exchange is related to a specific **Course** in which the student is currently enrolled, then you may identify that course from a drop-down menu, which contains the student’s schedule.

The **Date of Visit** field will automatically populate. If you are recording an advising exchange retroactively, then you will want to indicate the date associated with this advising exchange (e.g., the date you met with the student or the date you began an email exchange).

The **Location** drop-down menu contains college-specific advising centers and an “Other Advising Locations” option.

The **Attendees** fields will automatically populate with the time of the appointment or the time you created the report. You may modify the *Arrived* and *Departed* times to align with the actual times of your appointment.

ADVISING REPORT FOR UAC STUDENT

Appointment Details

Appointment: 04/04/2017 3:00p-3:30p - General Advising

Reason: General Advising

Meeting Type: Select Meeting Type

Course: [Empty]

Date of visit: 04/04/2017

Location: University Academic Advising Center

Appointment Summary

The Appointment Summary field provides space for you to record the primary details of the advising exchange/interaction (see the guidelines above).

Attendees

Terri Iler
Administration, Advisor

Attended

Arrived: 03:00 PM Departed: 03:30 PM

UAC Student - Freshman

Attended

Arrived: 02:03 PM Departed: [Empty]

Attachments

Attach File

Choose File no file selected

Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.

Date: [Empty] Time: [Empty]

cancel

The Attachments section allows you to attach a file, which can be later accessed by you or other advisors (it CANNOT be viewed by students).

The Suggested Follow-up section is optional.

Be sure to Save this Report.

Save this Report

Clicking **Add a Note on this Student** directly from the student's profile brings up the Note screen shown below.

Note (Required)

Note Subject
Diane Adams - 219485381
Grad Office - B career - GRAD OFF B

Relations

Note Reason
[Text Field]

Note URL
[Text Field]

Visibility

Faculty Advisor Only?
 Diane Adams?
 Printed Student Report

Attach File Choose File no file selected

Save Note Cancel

The **Note Reason** dropdown menu provides a number of options to specify the reason for the note.

We advise you to leave the **Note URL** blank.

The **Visibility** section allows you to specify the individual(s) authorized to see the note.

The Note feature also allows for adding attachments. If you want the attachments to be accessible to

a student, then you MUST select the student's name in the **Visibility** section to the right.

Be sure to **Save the Note**.

Following the creation of an Advising Summary Report or Note, you and other advisors can view the report or note under the student's **History** tab. Clicking on **View Advising Report** brings up the summary in more detail and allows the viewer to access the attachments. There is also the option for you to edit your Reports and Notes, as needed.

NOTE: Students cannot view Advising Summary Reports. However, they CAN view Notes and their attachments, if you give them access in the **Visibility** section of the Note.