

# Academic Advising

## Adding Advising Contact Information

### Overview

During or after an advising session, the advisor may wish to record what was discussed/accomplished during the session. Some of this information will be useful for the student to be able to view. Other notes may be for the advisors to use in preparation for future meetings with the advisee. When entering notes it is helpful to keep in mind that other advisors may refer to your notes in the event the student changes major or moves to a different campus. In accordance with the Family Educational Rights and Privacy Act (FERPA), it is important to remember that students may request and receive a complete copy of anything entered into the system. No notes should be entered on the second page of Advising Contacts under the mistaken notion that these are confidential. Nothing in the student's record is confidential from the student. The second page, that is not viewable in Self-Service, was created to allow for longer notes or other information that would be too large for the Self-Service view. Once Advising Contact Information has been added, saved, and the screen is closed, the data cannot be edited.

**NOTE:** As long as the screen is not saved and closed, data may be modified.

### Steps

#### Adding Advising Contact Information

1. Navigate to: **Self Service > Administrative Center > Academics 2 tab.**
2. Click **ADD ADVISING CONTACT**.
3. Enter the student's University **ID** or it might be filled from the Administrative Center, in **EmplID**. Also Enter **Academic Career**, and **Academic Institution**.
  - The student's Program and Plan are not required fields, but may be entered if desired.
  - The **Action Date** and the **Contact #** fields auto-fill when an Advising Contact is saved.

**IU Advising Contact**

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

EmplID:

Academic Career:

Academic Institution:

Academic Program:

Academic Plan:

[Add](#)

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

4. Click **Add**.

# Academic Advising Adding Advising Contact Information

- You will be taken to the *Enrollment Planning* page.

Enrollment Planning
Advising Notes

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**Advising Note**

Student: 0000011111      Advisor: Izzy A Teacher      [Term History](#)

Name: Ima Student

Action Date: 01/31/2008

Contact #: 99

\*Purpose:      

\*Contact Type:

Discussion Topics

<input type="checkbox"/> Admission	<input type="checkbox"/> Intl/Visa	<input type="checkbox"/> Financial	<input type="checkbox"/> Certification Interest
<input type="checkbox"/> Probation	<input type="checkbox"/> Temp Transfer	<input type="checkbox"/> Acad Petition	<input type="checkbox"/> Dual Degree Interest
<input type="checkbox"/> Dismissal	<input type="checkbox"/> Perm Transfer	<input type="checkbox"/> Prog Change	<input type="checkbox"/> Crisis Management
<input type="checkbox"/> Re-Admission	<input type="checkbox"/> Advanced Educ	<input type="checkbox"/> Minor Interest	<input type="checkbox"/> Other (see notes)

Student's Current Stack Customize | Find | First 1-2 of 2 Last

Career	Institution	Program	Plan Seq	Plan	Plan	Advisor
UGRD	IUINA	TECH1	10	BIMENTCHAS	Biomedical Engineering Tech AS	
UGRD	IUINA	SCI1	10	APBIO	Applied Biotechnologies AS PU	

Advised For

Institution: IUINA    Career: Undergrad    Program:      Plan:      Sub-Plan:

Term Advised For Find | View All    First 1 of 1 Last

\*Term:     \*Session:     Institution: IUINA

Advised Courses Find | View All    First 1 of 1 Last

Subject:      Catalog Nbr:      Class Nbr:

Units:     Dates:      Time:

M  T  W  Th  F  Sa  Su

**Student Viewable Comments:**

[Return to Academics 2](#)



OK    Cancel    Apply

[Enrollment Planning | Advising Notes](#)

- The **Student ID**, **Name** and **Advisor** fields will automatically be populated.
- If the student has been assigned a committee, the Committee name will be displayed.
- The **To Do List** icon ( ) and Term History link will display for every student.
- Positive and negative service indicator and FERPA icons, as well as the DECEASED icon will display when appropriate for the student.
- The **Action Date** is the date the information is added.
- A Contact number for the advising **Contact** will be created when the contact is saved.

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12. Select the **Purpose** for the contact from the drop down box. The choices are: Academic Interest, Athletic Advisement, Career Planning, Enrollment Planning, General Contact, Graduation Planning, and New Student Orientation.
13. Select the **Contact Type** from the drop down box. The choices in the drop down box are: Appointment, Email, Online, Telephone and Walk-In.
14. **Discussion Topics** can be selected to further refine or make additions to the **Purpose**. Select as many of the checkboxes as necessary.
15. The student's current Program Plan stack will automatically be entered. If the student has multiple stacks, all will display.
16. Enter the appropriate information in the **Advised For** section to indicate which Program and Plan the student is being advised for.
17. If enrollment planning is done for a specific term, the **Term Advised For** should be entered. An example is 4088 indicating the fall semester of 2008.
  - a. Multiple terms may be advised for by adding a row for each term.
  - b. Click  just below the **Term Advised For** blue bar to add additional terms.
18. The **Advised Courses** area can be completed to whatever level is desired.
  - a. Completion of this area is optional, but may be used as an enrollment planning tool.
  - b. Multiple courses may be advised for by clicking on  just below the **Advised Courses** blue bar.
  - c. When staff are entering information into an advising contact session, when enrollment planning for a specific term they have the ability to enter a class number and the system will now auto-fill and display a good deal of information associated with the class, and as always this information is viewable to the student via the Student Center. Information that auto-fills for each class number is: Subject, Catalog Number, Title, Units, Begin/End Dates of the class, Times, Days the class meets, and the Instructor (if in SIS). Thus advisors may create an enrollment plan for a student, with all recommended and alternate classes, which will now include complete class information, and which student and staff can later reference.
19. Advisors can place further information, things a student needs to do, discussion points, etc. in the **Student Viewable Comments** text box.
  - a. These comments are viewable by the student in Student Self-Service.
  - b. All advisors may also view these comments.
20. Click on the *Advising Notes* tab.

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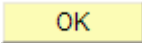
Enrollment Planning | **Advising Notes**

Date: 06/02/2008      Contact #: 99  
EmpID: 0000011111      Name: Student,Ima Good

[Return to My Academics](#)

OK    Cancel    Apply

[Enrollment Planning | Advising Notes](#)

21. Enter any contact notes about advising meetings. These notes are not available to the student through the OneStart Self-Service pages, but are available to all advisors. Students may request a copy of the advising contact note entries anytime they wish.
22. When all the desired fields have been completed, click 
  - a. Recall that although the session saves when the Apply icon is clicked, edits may be made as long as the screen is still active.
  - b. Once the screen has been saved AND exited, it becomes view-only.
  - c. Click  to save the information AND return to the *Academics 2* tab.
23. Repeat the above steps for each new advising contact.
24. If you have multiple advising contacts with a student in the same day, the **Contact** number will automatically be incremented for each contact.

# Academic Advising

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Enrollment Planning
Advising Notes

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**Advising Note**

Student: 0000011111      Advisor: Izzy A Teacher      [Term History](#)

Name: Ima Student  
 Action Date: 01/31/2008

Contact #: 02

Purpose: Academic Interest  
 Contact Type: Email

**Discussion Topics**

<input type="checkbox"/> Admission	<input type="checkbox"/> Intl/Visa	<input type="checkbox"/> Financial	<input type="checkbox"/> Certification Interest
<input checked="" type="checkbox"/> Probation	<input type="checkbox"/> Temp Transfer	<input type="checkbox"/> Acad Petition	<input checked="" type="checkbox"/> Dual Degree Interest
<input type="checkbox"/> Dismissal	<input type="checkbox"/> Perm Transfer	<input type="checkbox"/> Prog Change	<input type="checkbox"/> Crisis Management
<input checked="" type="checkbox"/> Re-Admission	<input type="checkbox"/> Advanced Educ	<input checked="" type="checkbox"/> Minor Interest	<input type="checkbox"/> Other (see notes)

Student's Current Stack						Customize   Find    First 1-2 of 2 Last
Career	Institution	Program	Plan Seq	Plan	Plan	Advisor
UGRD	IUINA	TECH1	10	BIMENTCHAS	Biomedical Engineering Tech AS	
UGRD	IUINA	SCI1	10	APBIO	Applied Biotechnologies AS PU	

Advised For				
Institution:	Career:	Program:	Plan:	Sub-Plan:
IUINA	Undergrad			

Term Advised For					Find   View All   First 1 of 1 Last
Term:	Session:	Institution:			
4088	Fall 2008	IUINA			

Advised Courses				Find   View All   First 1 of 2 Last
Subject:	Catalog Nbr:	Class Nbr:	ELEMENTARY COMPOSITION 1	
ENG-W	131		<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	
Units:	Dates:	Time:		
2.00				

**Student Viewable Comments:**

Student must contact Financial Aid to determine eligibility.  
 Also should contact Registrar prior to Spring enrollment to clear up record.

[Return to Academics 2](#)

[Enrollment Planning | Advising Notes](#)