Student Administration Instruction Document

Module:	Academic Advisement
Business Process Name:	**Advisor Notes**
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Advisor Notes Summary

Advisor Notes allows advisors to record interactions with students that can be seen by all other advisors on campus. This tool is especially helpful as students change majors and move from advisor to advisor. Advisors Notes will give Advisors the ability to do the following:

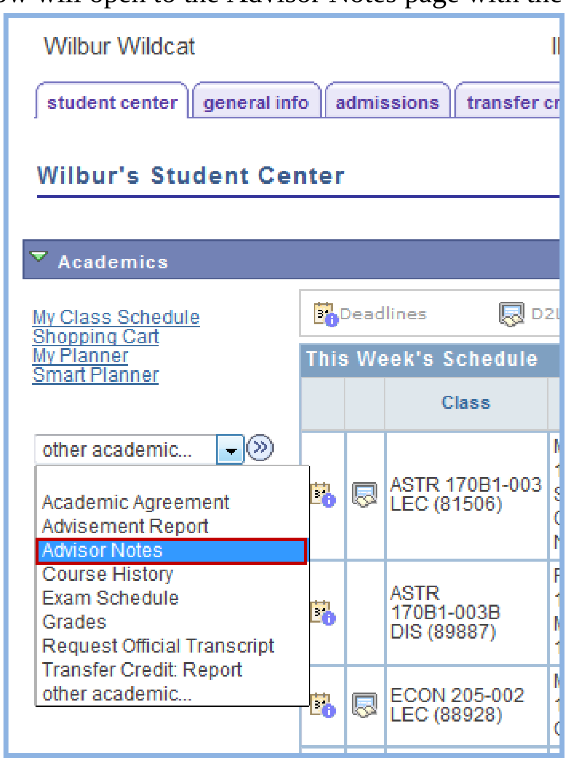
- Create a note
- View a note
- Add an addendum to an existing note

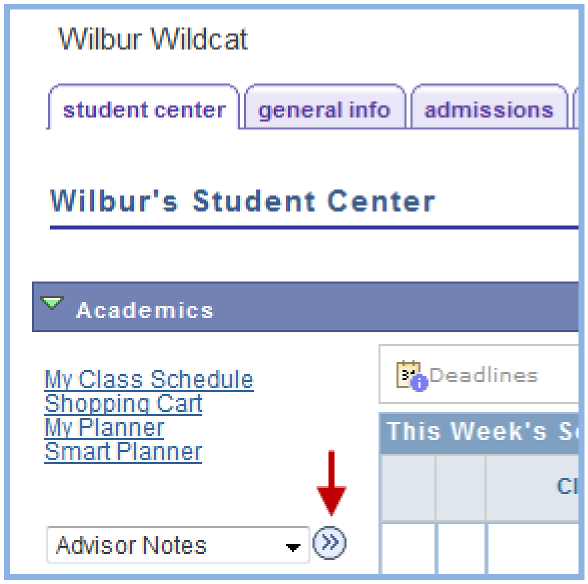
Getting Access to Advisor Notes

In order to gain access to Advisor Notes, the advisor's supervisor must make a request: https://request.uaccess.arizona.edu/uaccess_appreq/. Prior to gaining access to Advisor Notes, FERPA and Academic Advising Basics training must be completed and documented.

Creating a Note:

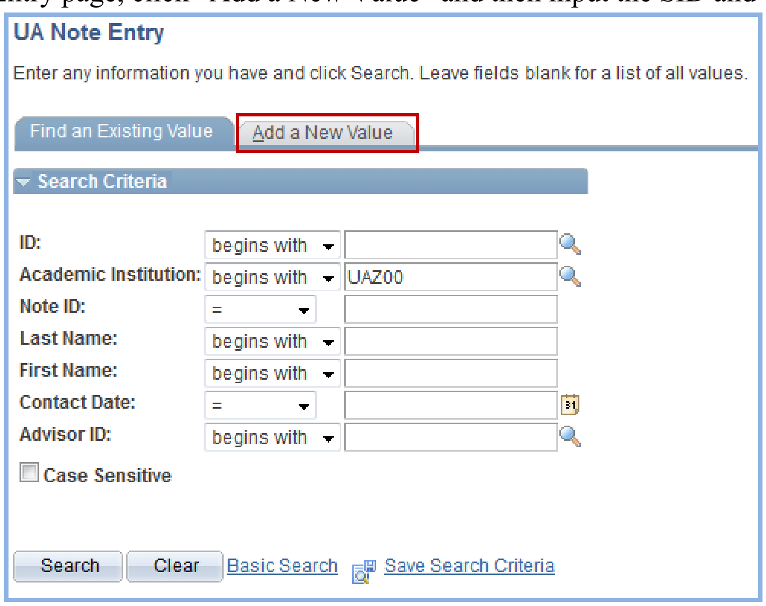
Advisors notes can be created in two locations. The first is in Student Services Center drop down menu. To access student Services Center go to **Main Menu > Campus Community > Student Services Center**. Once there, input the SID of the student and select "Advisor Notes" from the drop-down menu. Next, click the radial button and a new UAccess window will open to the Advisor Notes page with the SID already populated:

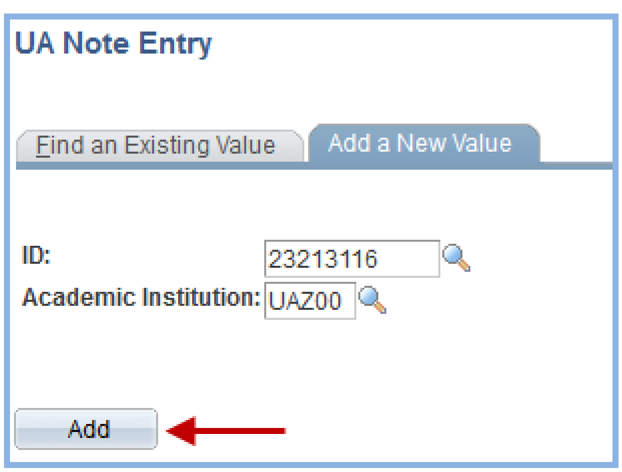




The second option for creating an Advisor Note is to do it from the UA Note Entry page in UAccess. The Note Entry page maybe be found by following this navigation: **Main Menu > Academic Advisement > UA Advisor Notes > UA Note Entry**.

Once one the UA Note Entry page, click "Add a New Value" and then input the SID and click "Add."





On the UA Note page, you must include values in the "Advisor College," "Note Category," and "Note Title" fields. "Topics," "Forms," and "Referrals" may be chosen to add more detail to the note, but are not required. The "Comment" field is where you'll include your actual Advisor Note regarding what was discussed and any information you feel pertinent to keep a record of. Finally, by clicking "Add File" you can upload a document to the Advisor Note. Once the Advisor Note is complete click "Save."

Note: If you choose APPT (Appointment) for your Note Category it will generate a survey to students, when saved, asking them to provide feedback on their advising session.

Viewing a Note:

To view an Existing Advisor Note, simply use one of the navigations above to access the UA Note Entry page for the SID you want to view the notes for. Instead of clicking “Add a New Value” stay on the “Find an Existing Value” tab.

Deleting a Note

On occasion an advising note is inadvertently entered into the incorrect student record. Advisors cannot delete notes themselves and must submit a deletion request to their UAAC Representative or College Coordinator with an explanation of the error, the note id, the student name and the date of the note entry. Once the UAAC Representative or College Coordinator approves the request, it is then forwarded to the Director of the Advising Resource Center.

Accessing my Advising Survey Results

When an Advisor selects the Appointment Note Category while creating a note, a survey will automatically be generated and sent to the student. Advisors will have access to the data from the survey questions in real time, and a 60 day delay for the written comments. Each advisor can only access his/her own personal survey data. To access survey data go to the following site in UAccess: *Main Menu > Academic Advisement > UA Advisors Notes > UA Advisor Survey Review.*

Requesting a new Topic, Form, Referral, Category or College note table

An Advisor may request that a new Topic, Form, Referral, Category or College be added to the note table. To do so Advisors must submit a New Note Table Request to their UAAC Representative or College Coordinator with an explanation for the request and the requested table’s desired information. Once the UAAC Representative or College Coordinator approves the request, it is then forwarded to UITS for processing.