




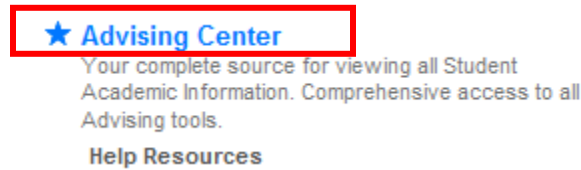
Advising Notes & Advising History


Advising Notes can be used to log information that was discussed during an advising session. Advising History is used to view historical advising notes entered for a student. This guide describes how to:

- Navigate to Advising Notes
- Search for a Student
- Open a new Advising Note
- Use Advising Topics
- View Advising History
- Use Best Practices for entering Advising Notes

*****Pop-up blockers must be turned off!*****

1. Go to   Faculty Center or  Staff Center .
2. Scroll to **Advising & Student Support** and select **Advising Center**.



2. Locate the **EmplID** field and click the Lookup icon  to search for a student.





myUMBC PeopleSoft CAMPUS SOLUTIONS

PS Favorites | Main Menu > UMBC Custom Items > UMBC Academic Advisement > UMBC Advising Center

UMBC Advising Center

Search for a student



Advisee Information

Empl ID	<input type="text"/>	
Institution	UMBC1 	University of Maryland Baltimore County
Career	UGRD 	Undergraduate
Term	2112 	Spring 2011

Custom Default Actions

Note: These actions only apply to the fields that are highlighted.

Save | Delete | Reapply

Advising Links Customize | Find |   First 1-11 of 11 Last

- [Advising Authorization](#)
- [New Advising Notes](#)
- [Advising History](#)
- [Advising Profile](#)
- [Search for Classes](#)
- [Degree Audit](#)
- [Class Schedule](#)
- [Course History](#)
- [Grade Report](#)
- [Transcript: View Unofficial](#)
- [Transfer Credit Report](#)

- Enter the student's **Campus ID** or **First and Last Name**. Click **Look Up**. The student's name will appear in the search results.

Look Up

Look Up Empl ID

ID:
Campus ID:
National ID:
Last Name:
First Name:

[Basic Lookup](#)

Search Results

View 100 First ◀ 1 of 1 ▶ Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
594	Smith,Brennan J	Male	08/2	ME32283	*****	USA	SSN	SMITH	BRENNAN

- Click anywhere on the [hyperlinked](#) text to select the student. You are returned to the Advising Center screen.

Note: To locate the campus ID for a student, use the [Lookup Person](#) link on myUMBC.

5. Select the **Term** for which you are advising the student. (*This field is required).
Click the **Lookup icon** to display a list of Terms from which to select.

For example, it is Spring 2010 and you are discussing what classes a student should register for Fall of 2010. The term you should select is Fall 2010. If you are entering an advising note for a student who is dropping a class this term, select the term Spring 2010.

UMBC Advising Center

Advisee Information

Empl ID	594	Smith, Brennan J
Institution	UMBC1	University of Mary
Career	UGRD	Und
Term	2112	Spring 2011

Click the **Lookup icon** to select the term for which you are advising the student.

Custom Default Actions

Note: These actions only apply to the fields that are highlighted.

Save
Delete
Reapply

Advising Links Customize | Find | First 1-11 of 11 Last

- [Advising Authorization](#)
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- [Transfer Credit Report](#)

7. Click **New Advising Notes**. It will open in a new window.

Advising Session Notes

Brennan Smith
Email ME32283@umbc.edu

Date & Time Stamp
Advisor Name

Student ID 1594
Campus ID ME32283

Custom Default Actions

Note: These actions only apply to the fields that are highlighted.

Save
Delete
Reapply

Advising Session

Session Date	08/26/2009	Session Time	10:34AM	*Session Type	Orientation
Advisor	1000011299	Susan Dawson			
Institution	UMBC1	Career	UGRD	Term	Fall 2009

Save

[Orientation Checklist](#)

Selected Term

8. Select the appropriate **Session Type**.

The following choices are available for **Session Type**:

Orientation
Appointment
Email
Orientation
Phone Call
Walk-In

Once the Session Type is selected Advising Topics appear below.

NOTE:

When the Session Type is anything other than "Orientation" the page expands to allow you enter comments, notes and additional information for the student.*

9. Check one or more boxes in the **Advising Topics** area.
Advising Comments appear below based on the Advising Topics selected.

Advising Session Notes

Brennan Smith		Student ID 2500064594	
Email ME32283@umbc.edu		Campus ID ME32283	

Advising Session			
Session Date	09/03/2009	Session Time	1:50PM
Advisor	1000011299 Susan Dawson	*Session Type	Appointment
Institution	UMBC1	Career	UGRD
		Term	Fall 2009

Custom Default Actions

Note: These actions only apply to the fields that are highlighted.

Save
Delete
Reapply

Advising Topics		
<input type="checkbox"/> Academic Difficulty	<input type="checkbox"/> Grad/Postgrad Planning	<input checked="" type="checkbox"/> Other
<input type="checkbox"/> Class Registration/Adjustment	<input type="checkbox"/> Internships, Study Abroad, Srv. Learning	<input type="checkbox"/> Reinstatement
<input type="checkbox"/> General Ed. And Univ. Requirements	<input type="checkbox"/> Major/Minor/Concentration	<input type="checkbox"/> Transfer Courses

[Expand All](#) [Collapse All](#)

Advising Comments		Find First 1-4 of 4 Last
▼ Honors College, Scholars Programs Issues		
Comments		
▼ Follow-Up Items From Prior Advising Sessions		
Comments		
▼ Referral To Campus Resources		
Comments		
▼ Other Comments		
Comments	Brennan is starting a part-time job, off-campus, this term.	

Select one or more topics

Sections expand based on topics selected.

Fill in comments in appropriate topic boxes.

Save

3. Enter Advising Notes in the appropriate topic comment Box.
4. Click **Save** to save comments entered. (Hint: You may have to scroll to the bottom of page to find the Save button.)

Advising Notes Best Practices

Advising Topic Comment Boxes

The Advising Topic comment boxes are meant to help guide you in the types of things to be discussed with a student who has come to be advised.

Advising Notes as a Log

Keep in mind when entering advising notes for a student, the notes are to be used as a log to benefit the next advisor (or other University official) who may work with this student in the future. The advising notes are not a report.

Saving Advising Notes

1. Save any notes entered by clicking the Save button. Do not close this page.
2. Return to the Advising Center and click [Advising History](#). View the Advising Note to make sure it displays the information that represents what you and the student discussed during the advising session.
3. Once satisfied with your notes, save and close the New Advising Notes page.

Special Note:

If notes are entered for an advising topic and you uncheck the advising topic checkbox after a note is entered the following warning message appears:

Unchecking this topic will result in the loss of "Other Comments" notes. Do you want to continue? (24000,1)

There is at least one comment linked to this Advising Topic. By unchecking this box you will lose any information that was recorded during this session for that comment category.

Yes

No

Click **NO**, to save your comments entered under the Advising Topic. Then click the Save button.

Click **YES**, the Advising Topic checkbox is no longer checked, any topic sections and comments entered in those sections is removed.

*If after clicking YES, you do not click SAVE, but rather close the Advising Note page, the advising note entered still appears in Advising History.

Advising Notes – Example: Orientation

When “Orientation” is the selected Session Type the Orientation Checklist appears as a link on the page. Click the Orientation Checklist and enter the appropriate information.

1. Click the [Orientation Checklist](#) hyperlink.

Orientation Checklist

Brennan Smith	Student ID	2500064594	
Email ME32283@umbc.edu	Campus ID	ME32283	
Advising Session			
Session Date	06/14/2009	Session Time 12:53PM	Session Type Orientation
Advisor	1000011299	Susan Dawson	
Institution	UMBC1	Career UGRD	Term 2098

Advisor and Advisee have:

- Discussed advisee's major and minor interests at this time
- Discussed advisee's outside responsibilities, such as work and family obligations.
- Discussed advisee's foreign language proficiency based on prior language experience and the resulting foreign language placement at UMBC.
- Discussed English, Math, and Reading placement test results, as applicable.
- Discussed advisee's subject matter strengths and areas of concern.
- Discussed advisee's extracurricular and co-curricular interests at UMBC.
- Provided contact information for the Office of Academic and pre-professional Advising for any follow-up issues or schedule adjustments needed after orientation.
- Discussed academic resources including the Learning Resource Center, Student Support Services, Library, faculty office hours.
- Briefly discussed long-term academic plan, including sequence of courses in major, completion of general education and graduation requirements.
- Reviewed prior college coursework, i.e., transfer credit or AP/IB/CLEP credit
- Discussed appropriate course load given advisee's personal and academic circumstances.
- Discuss First Year Seminars (FYS), Introduction to an Honors University (IHU) courses, and other Special "first year" opportunities available at UMBC.

Check applicable boxes

Other topics discussed or special issues:

Enter free form text for additional comments

Refresh to see updated Enrollments

[Refresh Course List](#)

Class Nbr	Subject Area	Catalog Nbr	Units	Status	Reasons for taking (major/minor, GFR/GEP, elective)
2636	ENGL	391	3.00	Enrolled	
2198	GES	311	3.00	Enrolled	
2276	GES	400	4.00	Enrolled	
2125	LATN	201	4.00	Enrolled	
5867	PHED	144	1.50	Enrolled	

Enter Course-specific notes
Max = 50 chars.

Status = Enrolled or Waiting

2. Enter information discussed with the student during Orientation. Make sure your entries are clear, informative and avoid using any kind of judgmental language or terms. **CLICK SAVE** when you have finished the Orientation Checklist.

Advising History

Once an Advising Note has been saved it becomes an historical record. You will be unable to add comments or notes to an existing advising note that has already been saved and closed.

You can view previously entered Advising Notes for a student by accessing Advising History.

UMBC Advising Center

Advisee Information	
Empl ID	256 Smith, Brennan J
Institution	UMBC1 University of Maryland Baltimore County
Career	UGRD Undergraduate
Term	2112 Spring 2011

Custom Default Actions

Note: These actions only apply to the fields that are highlighted.


Save

Delete

Reapply

Advising Links
Advising Authorization
New Advising Notes
Advising History
Advising Profile
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1. Click **Advising History**. **Advising History** opens in new window.

2. Click on the  or [hyperlink](#) within the Advising Session to view comments entered from a previous session.

Advising History






Smith	Student ID	95
Email	Campus ID	XR6

[Refresh](#)

[Expand All Sessions](#)

[Collapse All Sessions](#)

Click to expand or collapse session details

	Session Date:	2010-02-23 2:39 PM	Career:	Undergraduate	Term:	Spring 2010
Advisor	Bethany Spore		Session	<u>Other</u>	Source	PeopleSoft
	Session Date:	2009-11-12 4:27 PM	Career:	Undergraduate	Term:	Fall 2009
Advisor	Catherine Bielawski		Session	<u>Appointment</u>	Source	PeopleSoft
	Session Date:	2009-04-02 12:00 AM	Career:	Undergraduate	Term:	** Not Specified **
Advisor	annearey		Session	Appointment	Source	Conversion
	Session Date:	2008-11-13 12:00 AM	Career:	Undergraduate	Term:	** Not Specified **
Advisor	bielawsk		Session	Appointment	Source	Conversion
	Session Date:	2008-07-21 12:00 AM	Career:	Undergraduate	Term:	** Not Specified **
Advisor	annearey		Session	<u>Phone Call</u>	Source	Conversion

Click for a "view only" page of Advising Notes taken during the selected session.

To enter additional information for this student, you must create a **New Advising Note**.

Close the Advising History window and open the Advising Center page. Select **New Advising Notes**.

3. Click the **X** in the upper right corner of the browser window or tab to close the Advising History page.