

University of Akron Advising Summary – March Functionality

Below is a brief graphical representation of how an advisor can quickly and easily create an Advising Summary Report for an advising session as well as creating a Note in GradesFirst.

Creating an Advising Summary Report for an advising session

The screenshot shows the 'Advising Home' page with a navigation bar (Home, Calendar, Conversations) and tabs for 'My Assigned Students', 'Upcoming Appointments', 'My Availability', and 'Advising Center'. Below the tabs is a 'Filter By Tags' section with a red box labeled '2' around it. Underneath are buttons for 'Send Message', 'Schedule Appointment', 'Advising Report' (highlighted with a red box), and 'Note'. A table lists students with checkboxes in the first column. The first student, 'Banulus, Val', has their checkbox checked and is highlighted with a red box labeled '1'. The table has columns for 'ALL', 'STUDENT NAME', and 'CATEGORY'.

ALL	STUDENT NAME	CATEGORY
<input checked="" type="checkbox"/>	1 Banulus, Val	Men's Basketball
<input type="checkbox"/>	2 Bigs, Shannon	Women's Soccer
<input type="checkbox"/>	3 Celex, Brian	Baseball

Step 1: Select a student to create an Advising Summary Report. In order to create an Advising Summary Report for an advising session that was not scheduled through GradesFirst, select the student by checking the box next to their name.

Step 2: Open the Advising Summary Report. In order to open an Advising Summary Report for the selected student, click the 'Advising Report' button above the assigned student list.

The 'Create an Advising Report' form is divided into several sections. The 'Appointment Details' section includes fields for Reason (Interview Coaching), Course (ECON311), Date of visit (03/02/2014), and Location (Student Services Center, highlighted with a red box labeled '3'). The 'Attendee' section lists 'Rebekah Steelman' and 'Val Banulus', both with 'This person attended' checked. The 'Appointment Summary And Reminders' section has a 'Summary' box (labeled '4') and 'Suggested time' (3:30 PM, labeled '5') and 'Suggested date' (03/21/2014, labeled '5') fields. At the bottom is a 'Save this Report' button (labeled '6').

Step 3: Choose a location. In order to submit the Advising Summary Report, a location must be chosen.

Step 4: Add summary notes. Use this section to add summary notes for the advising session.

Step 5: Add reminder information. Use this section to add reminder information to the Advising Summary Report. **This does not schedule any future appointment.**

Step 6: Save the Advising Summary Report. Once the Advising Summary Report has been filled out, click the 'Save this Report' button to save the report information.

Submitted Advising Summary Reports will populate in the Recent Advising Appointments section.

The 'Advisor Reporting' section includes buttons for 'Recent Advisor Appointments' and 'Recent Reports You Created'. Below is a 'RECENT ADVISING APPOINTMENTS' section with 'Add Report' and 'Mark No-Show' buttons. A table shows a recent appointment on 03/02/2014 for 'Interview Coaching'.

DATE	REASON	COMMENT
03/02/2014	Interview Coaching	

Add a Note to a student profile

Advising Home

My Assigned Students | Upcoming Appointments | My Availability | Ad

Filter By Tags

Send Message | Schedule Appointment | Advising Report | Note

ALL	STUDENT NAME
<input checked="" type="checkbox"/>	1 Banulus, Val
<input type="checkbox"/>	2 Bigs, Shannon

Step 1: Select the student to add a Note. In order to add a Note to a student profile, first select the student by checking to box next to their name.

Step 2: Open the Note prompt. In order to open a Note prompt, click the 'Note' button above the assigned student list.

Add a Note

Note (Required)

Add note here!

Note Reason

Transcript x

Attachments

Attach File Choose File No file chosen

Permissions & Settings

Viewable by student
Check this option if you wish to allow the selected student(s) to view this note.

Show on Printed Student Report

Task Tracking

Due Date (optional)

Is Complete?

Show on My Task List

Save Note Cancel

Step 3: Create the Note. This section can be used to add additional information to the Note.

Step 4: Choose a Note Reason. It is required to choose a Note Reason before saving the Note. Multiple Note Reasons can be chosen.

Step 5: Attach a document to the Note. Use the 'Choose File' button to add an attachment to the Note.

Step 6: Add permissions to the Note. It is optional to allow the student to view the Note as well as have the Note appear on the Student Development Report.

Step 7: Save the Note. Once all Note information has been inputted, click the 'Save Note' button to create the Note.

Viewing Notes. Notes can be viewed from the student profile "Reports / Notes" section or the "Notes" report in the 'Reports' tab.

NOTES ABOUT STUDENT

Mark as Complete

ALL	DATE	CREATED BY	NOTE	NOTE REASONS	COMPLETE?	ATTACHMENTS
<input checked="" type="checkbox"/>	03/02/2014	Rebekaah Gaxman	Add note here!	Transcript	--	+

"Reports / Notes" section of the student profile

Notes on Students

Search Show / Hide Advanced Search

Keywords: Begin Date: 03/02/2014 End Date: 03/08/2014

Search Note Text: Note Reasons:

Search My Students Only At-Risk Students Only Include Inactive

"Notes" report