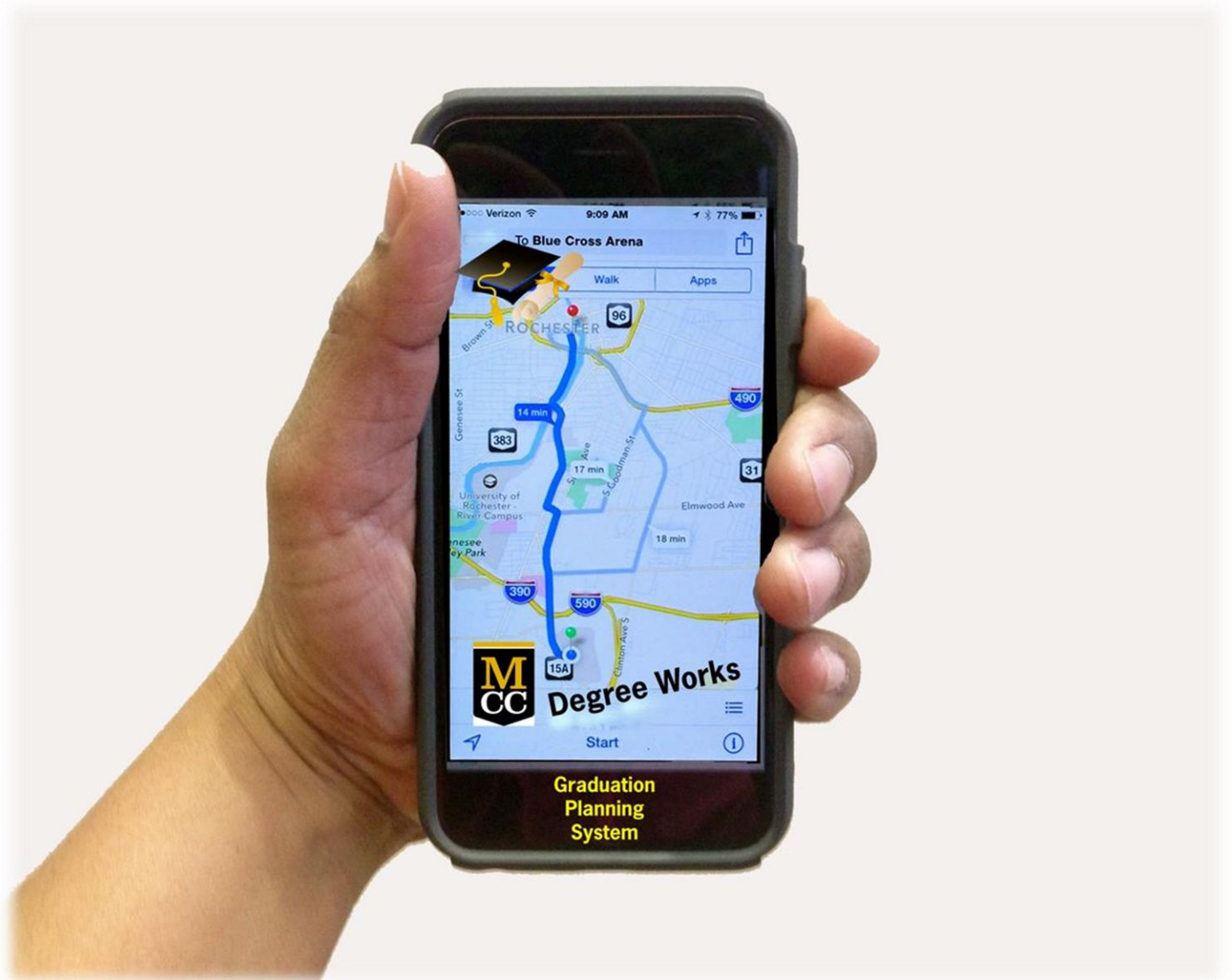


# Degree Works

## *Advising Notes Manual*



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## **Professional and Ethical Responsibility**

The professional and ethical responsibilities for viewing, entering, changing, and sharing academic information about a student are described in the National Academic Advising Association's Statement of Core Values of Academic Advising:

- Advisors respect the rights of students to have information about themselves kept confidential. Advisors share information with others about students and their programs only when both advisor and student believe that information is relevant and will result in increased information or assistance, assessment, and provision of appropriate services to the student.
- Advisors gain access to and use computerized information about students only when that information is relevant to the advising they are doing with that particular student. Advisors enter or change information on students' records only when legitimately authorized to do so.
- Advisors need to document advising contacts adequately to aid subsequent advising interactions.

### **Why take notes?**

- Creates a record of student's advising contacts and advice provided.
- Creates institutional memory.
- Increases advisor efficiency and effectiveness.
- Refreshes advisor memory prior to return visits and helps when planning next steps.
- Communicates critical information to other College personnel.
- Personalizes the advising experience.

## How to take notes in Degree Works

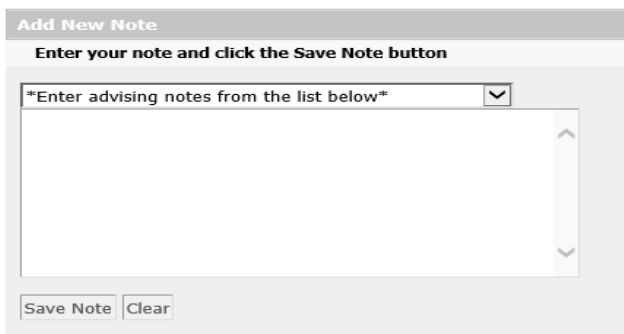
Go to Degree Works. Make sure you are using Internet Explorer or Firefox. Log in at [my.monroecc.edu](http://my.monroecc.edu). Click on the Employees tab. Click on Faculty Essentials. Click on Degree Works login.

Enter student information if not already populated in Degree Works

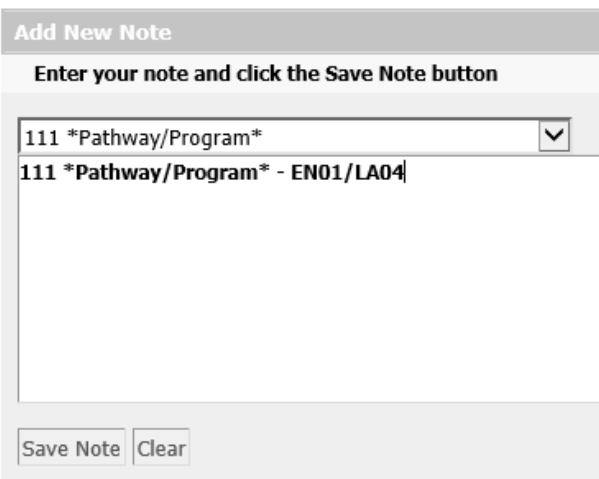
Click on Notes tab

Click "Add Note" found to the left

Click dropdown box



Always select 111 \*Pathway/Program\* first and enter the correct information. Once selected this will populate the notes box. Enter the student's pathway and program like this EN01/LA04 (Use Caps Lock). If you do not remember the pathway and program, you will have to go back to the worksheet.



If you or the student are changing the student's pathway, program or major during the advising session and you will be advising the student according to their new pathway, program or major, note the change of pathway, program or major as outlined below.

**Add New Note**

Enter your note and click the Save Note button

300 \*Courses advised\*

111 \*Pathway/Program\* EN01/LA04 11A  
\*Pathway/Program/Major/Change\* to BU01/BU01 2AC  
\*Advisement Center (Location)\* 300 \*Courses  
advised\*BUS 104, MTH 165, ACC 101, ECO 111, PEC 253

Save Note Clear

Next select a location (see definitions for location choices)

**Add New Note**

Enter your note and click the Save Note button

2AC \*Advisement Center (Location)\*

111 \*Pathway/Program\* - EN01/LA04 2AC \*Advisement  
Center (Location)\*

Save Note Clear

Then select **300 \*Courses advised\*** and list the courses advised for the student if applicable. If the advisement session did not involve course selection, *skip this step*.

**Add New Note**

Enter your note and click the Save Note button

300 \*Courses advised\*

111 \*Pathway/Program\* - EN01/LA04 2AC \*Advisement Center (Location)\* 300 \*Courses advised\* - MTH 104, ENR 153, ENG 101, HIS 112, PEC 148

Save Note Clear

Then select advising note codes from drop down box. Use as many note codes as needed to document session.

**Add New Note**

Enter your note and click the Save Note button

RAP \*Transfer Planning\*

111 \*Pathway/Program\* - EN01/LA04 2AC \*Advisement Center (Location)\* 300 \*Courses advised\* - MTH 104, ENR 153, ENG 101, HIS 112, PEC 148 ECE \*College Resource Referral\* RAP \*Transfer Planning\*

Save Note Clear

Lastly type your detailed, advisement specific to the student in the box.

**Add New Note**

Enter your note and click the Save Note button

RAP \*Transfer Planning\*

111 \*Pathway/Program\* - EN01/LA04 2AC \*Advisement Center (Location)\* 300 \*Courses advised\* - MTH 104, ENR 153, ENG 101, HIS 112, PEC 148 ECE \*College Resource Referral\* RAP \*Transfer Planning\* Discussed the benefits of using the Math Learning Center. Reviewed coursework needed at RIT

Save Note Clear

Don't worry about entering information on different lines or adjusting the spacing, once the note is saved, each selection follows the next.

When finished click "Save Note"

You will then see a message that your note was added successfully. You will need to click 'Run New Audit' which is stated in the message to get your notes incorporated into the latest audit for the student.

View Notes		
Note Text	Created By	Create Date
111 *Pathway/Program* - EN01/LA04 2AC *Advisement Center (Location)* 300 *Courses advised* - MTH 104, ENR 153, ENG 101, HIS 112, PEC 148 ECE *College Resource Referral* RAP *Transfer Planning* Discussed the benefits of using the Math Learning Center. Reviewed coursework needed at RIT	Dingee, Sally B.	03/06/2018

As the author of the note you may delete or modify your own notes. Only the text box can be modified so if you need to add additional codes, they will need to be put in as a new note.

Important things to keep in mind when creating notes –

- Students see these notes, they are added to the Degree Works audit
- Be concise and to the point
- Please do not use any special characters in your notes

Please contact Sally Dingee (585) 292-2410 or [sdingee@monroecc.edu](mailto:sdingee@monroecc.edu) with any issues or questions regarding notes.

## **Advisement notes definitions**

*These codes do not always indicate action in Banner, but that the discussion took place in the advising session.*

**111 Pathway/Program** - documents the student's pathway and program in the current term (example: EN01/LA04)

**11A \*Pathway/Program/Major/Change\*** - changed pathway, program or major, review of new curriculum requirements and course advisement took place

**2AC Advisement Center (Location)** – advisement took place as a walk-in in the Brighton campus Advisement Center

**2AR Advisement and Registration Event (Location)** – advisement took place at event organized for new, transfer and readmitted student registration

**2SA \*Secondary Advisor Appointment (Location)\*** - advisement took place with an advisor who supports the student as part of their special population connection (examples: Athletes, Honors, EOP, Grant programs, Veterans, International students, ESOL)

**2ET Email/Telephone/Online System (Location)** – advisement took place by email, telephone, chat messaging, in Blackboard or Starfish

**2FA Faculty Advisor Appointment (Location)** – Individual advisement provided in an office

**2GA Group advisement (Location)** – advisement to a small group of students

**2HS High school Advisement Event (Location)** – advisement session held at a local high school

**2PA Professional staff Appointment (Location)** – Individual advisement provided in an office

**2SD SEC (Location)** – advisement took place as a walk-in at the Downtown campus Student Engagement Center SEC

**2SE SERC (Location)** – advisement took place as a walk-in at the Downtown campus SERC

**300 Courses Advised** – list of advised courses (example: ENG 101, MTH 150, SOC 101 etc.)

**AAS Academic Strategies** – helping advisee understand their learning style; manage reading load, share exam study strategies, time management, note-taking tips, and/or discussion regarding classroom engagement

**BAP Career Exploration** – the process of student self-assessment, educating an advisee about the world of work, helping the advisee identify and explore potentially satisfying occupations, help the advisee develop an effective strategy to realize their goals



CAP Choosing Pathway - discussion of advisee's interests, skills, abilities and goals to help them choose an educational pathway

DAP College/Life Balance – helping an advisee set realistic goals for college, helping an advisee to cope with the multitude of distractions facing them as college students

ECE College Resource Referral – directing advisee to someone or something for consultation, help, review or further action (examples – Counseling Center, Financial Aid, Learning Center, etc.)

FAP Completion Progress – identify milestones specific to program completion, review Degree Works audit, developed, reviewed or revised semester-by-semester plan, set anticipated graduation date, Rochester Works/599 paperwork

HCE Co-Curricular Advisement – encouraging advisee to get involved in out-of-classroom learning experiences, connection of co-curricular experiences to personal development and program of study

IAP Employment Information – discussion of specific jobs within a particular career path, shared relevant data on wages, employment outlook and training for specific careers

JCE Establishing Connection – first point of contact including face to face, phone, or email

KFA Excelsior Compliance – advising regarding Excelsior Scholarship eligibility

MFA Financial Aid Course Eligibility – resolving a course eligibility discrepancy, last term exemption

ORI Overload Approval – permission for extension of normal course load discussed

PRI Prerequisite Override – permission to waive prerequisite requirement (s) discussed

QSP Satisfactory Academic Progress – review of academic improvement plan, discussion of repeat coursework, review of appeal process, and explanation of SAP criteria

RAP Transfer Planning – selecting specific coursework for a transfer institution, exploring transfer institutions to find fit, completing college applications, admissions essay review

EXC Course Exception Applied – waiver or substitution of coursework approved by department chair (*Graduation audit code used only by Records and Registration staff*)

## Guidelines for Advising Notes

### 1. Include notes that will help the student.

- a. "Student should remember to take Math placement exam before registration for Spring semester."
- b. "Asked student to bring list of ten possible courses for next semester to our advising session."
- c. "Reminded student to get transcript from OCC sent to the Admissions Office as soon as possible."
- d. "Student did not come to scheduled appointment. Needs to reschedule as soon as possible."
- e. "Discussed importance of repeating CIS 100 and ECO 111 in Spring semester."

### 2. Include notes that will help future advisors understand the student or the advice that you gave.

- a. "Encouraged student to enroll in MTH 155 because of interest in Elementary Education."
- b. "Student took HIS 111 out of interest even though he already has credit for PSY 101. Understands HIS 111 will be elective."
- c. "Explained special requirements for Excelsior scholarship students."
- d. "Student intends to go to an OT school. Is only taking prerequisite courses to get admitted there."

### 3. Include notes that will facilitate the relationship with the student.

- a. "Reminded student to make appointment well in advance of her registration date for Summer and Fall."
- b. "We agreed to meet once a month during the Spring semester to monitor progress."
- c. "Commended student for excellent grades last semester."

### 4. Include possible consequences of not following advice given.

- a. "Discussed need to take MTH 098 during Spring semester so MTH 104 can be taken in Fall and student can be admitted into desired degree program."
- b. "Student wants to enroll in 18 hours. Cautioned regarding heaving academic load."
- c. "Reminded student to finish 30 hours for the academic year in order to keep Excelsior scholarship."

**5. Include referrals of a non-sensitive nature.**

- a. "Encouraged student to see English department chair about possibility of getting English credit for some transfer courses."
- b. "Encouraged student to make appointment with career counselor."
- c. "Student is interested in becoming an orientation leader; referred to FYE office about application process."
- d. "Student should contact Veterans Services Office to discuss Veteran's benefits."

**6. Include comments that help you in future interactions with student. (Perhaps in helping students with reference letters or scholarship applications.)**

- a. "Student was well prepared for advising session. Had tentative schedule ready worked out."
- b. "Student has consistently expressed an interest in attending dental school at UB."

**7. Exclude your subjective judgments about the student, especially when they are negative.**

- a. "Student is not motivated to succeed in classes this semester."
- b. "Student struggling in all classes; I think he would have been better off dropping out of college."
- c. "I doubt student's ability to succeed in this major."

**8. Exclude comments regarding student's instructors, especially when they are negative.**

- a. "Student is having a personality conflict with COM 120 instructor."
- b. "Student is considering dropping ENG 101 because of a problem with the professor."
- c. "Student indicated that she is considering filing a sexual harassment charge against her Political Science professor."

**9. Exclude personal concerns of the student.**

- a. "Parents are going through a divorce this semester."
- b. "Student was assaulted earlier this academic year."
- c. "Sister has cancer; student is having a very difficult time staying focused on academics."
- d. "Student has to go to court next week; will miss classes."
- e. "Student shared problems she is having with motivation and time management."

<b>Do</b>	<b>Don't</b>
Student has not had a math class in five years and is concerned about ability to succeed. Discussed importance of starting math sequence ASAP.	Student is scared of math and is avoiding it.
Student dropped BIO 120	Student dropped BIO 120 due to unfair grading policies of instructor.
Referred to Financial Aid.	First generation college student. Widowed mother. No financial support from family. Referred to financial aid counselor.
Student wanted it noted that he missed two weeks of classes as a result of hospitalization.	Student missed two weeks of classes because of hospitalization for cancer treatment.
I asked the student to return for another advising session when he has prepared a list of courses for next semester.	Clueless.
Student may be overextended with classes, work, and activities.	Student should get priorities in order and quit that job!
Student requested tutoring support. Referred to Academic Support Services.	Student in financial and academic distress. Referred to Academic Support Services.

**IN GENERAL:**

- If in doubt, leave it out.
- Describe, do not evaluate.

# Degree Works Notes Manual

## Quick reference sheet!



Login to *my.monroecc.edu* (Use Firefox or Internet Explorer)

Code	Record Advisement in Degree Works!
111	Confirm Pathway/Program
2**	Location of Advisement
300	Courses Advised
Add a Note	Use as many note codes as needed (See Pages 8 & 9 in Manual)

Questions? Issues? Please contact Sally Dingee (585) 292-2410 or [sdingee@monroecc.edu](mailto:sdingee@monroecc.edu)