

Advisor Reporting

Advisor Report

At the bottom of the Advising Home page is an area called Advisor Reporting. This is where you will find a listing of all your previous advising appointments, the advising reports you have filed or have yet to be filed.

Advisor Reporting

Recent Advisor Appointments		Recent Reports You Created				
Recent Advising Appointments						
Actions ▼ Show Cancelled						
<input type="checkbox"/>	DATE	REASON	COMMENT	ATTENDEE	ADVISING TIME	REPORT FILED? ▼ DETAILS
<input type="checkbox"/>	1/1	10/16/2015 01:30p - 02:00p	Advising	Gonzalez, Laura	-	Not Yet. Details

Recent Advisor Appointments

This tab displays all the previous advising appointments you have had as an advisor. You have several options available to you through the Actions Menu.

CREATE AN ADVISING REPORT

Appointment Details

Appointment: 09/18/2015 10:30a-11:00a - Advit ▼

Reason:

Course:

Date of visit:

Location:

Attendee

Ashlie Prioleau

Arrived: Departed:

This person attended

Laura Gonzalez

Arrived: Departed:

This person attended

Appointment Summary And Reminders

Summary

Suggested time:

Suggested date:

This will be saved on the report as a suggestion. No appointment will be created.

Attach File

No file chosen

By checking this box, I confirm that I have not violated any applicable rules or regulations (University, NCAA, etc.) in providing services to this student.

Details- The "Details" link allows you to access the Manage Appointment dialog to see or edit the details of the appointment.

Add Advising Report- File an advising report by selecting this action. The box on the left will appear with the options to include summary information along with supplemental documents to the Student's Profile.

Issue Alert- Easily issue an alert for the student associated with this appointment.

Mark No-Show- When a student fails to show up for the scheduled appointment, the advisor can mark them as a no-show using this option. Note: Richie Bateman (student) does not have a checkmark in "This Person Attended" box. The summary boxes of the appointment will not be shown when the user is marked as a no show. Tracking students who regularly fail to attend appointments is easy. Once a student is marked as a no-show, an advisor can click on the Reports tab > and run the Advisor No-Shows report for a detailed report on every no-show instance.

Show Cancelled- As with many of our grids, we purposely exclude appointments that have been cancelled. To include those cancelled appointment in this list, simply check this box.

Note: When you check "This Person Attended", the summary boxes here will appear.

Recent Reports Created

Need to see a quick list of all the advising reports you have created for the term? This tab is for you.

Sorted by the most recent report first, this grid will display all of your filed advising reports for easy access. From here you can click the Details link to view (and optionally Edit) a report or click the Delete link to remove the report.

Recent Advisor Appointments	Recent Reports You Created				
DATE	STUDENT NAME	SUMMARY	FOLLOW-UP?		
09/02/2015	Angelos, Nelly	We discussed Externship options and Nelly will review the...	No	Details	Delete

Drop-In Advising Reports

To create an advising report for a drop-in advising session:

1. From the My Assigned Students tab on the Advising Home page or from the Search screen, select the student you met with by checking the checkbox next to their name.
2. Click the Advising Report button.

3. The system will then display the Create an Advising Report dialog. Every field on this form is optional, so only fill out the fields that are relevant for you and your institution.

Note: You should only use these steps if a student did not check in as a drop in through the kiosk or advising center mode. If a student actually checks in as a drop-in then you will enter the report from the Advising Center tab instead. Failure to do this can result in duplicate reports and skewed reporting.