REVISION CONTROL

Document Title: Advisor Report

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Introduction

The purpose of this process guide is understanding the functionality of the Advisor Report and when using an Advising Report is appropriate.

Advisor Reports allow the advisor to document the advising appointment with a student. Advisor Reports allow the advisor to indicate the day, time and location of the appointment. This report also allows for the advisor to summarize the advising appointment such as campus resources that were recommended, class selections, discussion of study skills, etc.

The advisor can also refer back to the advising reports or run a report. Other users with the Advisor Report permission can also view others’ advising reports.

Related Documentation

None

1.0 Advisor Report

Advisor Reports can be accessed from a student’s profile page:

From the student’s profile page, select Report on Advising:

Or the search functionality including:
Select the box next to the student:

Select the **Actions** dropdown and select **Advising Report**:
What was discussed during/reasons of the appointment.

When appointment took place.

Summary of appointment. DO NOT include information regarding student’s medical or mental health history.

Attach a file (ex. PDF, Word doc, etc.)

Select Save to save the report.

Advisors name will appear here.

Time of appointment.

Uncheck box if student did not attend appointment.

Choose location