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Student Services Center

Viewing the Student Center Tab

Procedure

Use the student center tab to view Student Center the way a student sees it.

Note: Student Services Center is also used to view additional student information, as referenced in the other tutorials under the Student Services Center section.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This tutorial begins after navigating to Campus Community &gt; Student Services Center and searching for the student.</td>
</tr>
</tbody>
</table>

As you can see, the student center tab gives a snapshot of current student information, such as the class schedule and financial information.

Scroll down to access the information on the bottom of the page.

Click the scrollbar.
### Step 3

You can also view Personal Information, such as date of birth, address, and phone number.

Scroll up to return to the top of the page.

Click the scrollbar.
4. Under the main sections click the links, such as My Class Schedule or View Financial Aid, to view more details from the student’s point of view.

**Note:** Many of the links on the right side launch external sites.

5. The drop-down menu allows you to view other parts of a student’s information the way the student sees it.

Click the Group Box drop-down list.

6. Using the drop-down, you can navigate to details about Academic Requirements, Course History, Grades, and the Transfer Credit Report. Depending on your access and the time in the academic year, you may see a slightly different list of items than the student does.

7. However, the tabs across the top provide more details than the drop-down options.

For example, the general info tab contains additional personal data and Student Groups, as well as an additional place to view Service Indicators.

8. Within the This Week's Schedule section, the student can see certain deadlines at a glance.

Click the Academic Calendar Deadlines button.
Step | Action
--- | ---
9. | On this screen, you see standard academic calendar information as well as deadlines specific to the class.
 | Click the scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the Return to Student Center link.</td>
</tr>
</tbody>
</table>

**Drop Calendar:**
- Drop - Delete Record: 08/21/2011
  A drop dropped on or before this date will not appear on your transcript.
- Drop - Return Record: 09/15/2011
  A drop dropped on or before this date will appear as "Drop" on your transcript.
- Drop with Penalty: 12/07/2011
  A drop dropped on or before this date will appear as "Drop with Penalty" on your transcript.

**Academic Calendar Dates are subject to change.**
[Return to Student Center]
11. In addition to seeing the list view of the schedule, you can also see a calendar view.

Click the Weekly Schedule link.

weekly schedule

12. Click the scrollbar.
Step | Action
--- | ---
13. | Use the **Display Options** section to customize the view of the calendar.

*Note: If you make any changes to the filters, you must click the refresh calendar button in order for the change to display.*

14. | Click the **Cancel** button.
Step | Action
--- | ---
15. | The student’s Shopping Cart Appointment, Enrollment Appointment, and Open Enrollment dates are visible from the **student center** tab.

*Note: The information you see in the Enrollment Dates box varies depending on the time in the academic year.*

Click the **details** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 16.  | Select the appropriate term.  
      | Click the **Fall 2011** option. |
| 17.  | **Click the Continue button.** |
Step | Action
--- | ---
18. | This student has an Enrollment Appointment and Open Enrollment Dates which are dates the student can enroll.

*Note: The example here is not representative of actual Enrollment dates.*

19. | Click the **Cancel** button.

---

### Enrollment Dates

To view appointments and enrollment dates for another term, select the term and click Change.

**Fall 2011 | Undergraduate | The University of Arizona**

**UAccess STUDENT**

<table>
<thead>
<tr>
<th>UAccess STUDENT</th>
<th>Home</th>
<th>Add To Favorites</th>
<th>Sign out</th>
</tr>
</thead>
</table>

**Victoria Quigley**

| ID: 09192706 | **Training Guide** |

---

**Enrollment Dates**

To view appointments and enrollment dates for another term, select the term and click Change.

**Fall 2011 | Undergraduate | The University of Arizona**

<table>
<thead>
<tr>
<th>Enrollments</th>
<th>Appointment Begin</th>
<th>Appointment End</th>
<th>Max Total Units</th>
<th>Max Audit Units</th>
<th>Max Wait List Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Academic Session</td>
<td>April 29, 2013 8:00AM</td>
<td>August 16, 2013 8:00PM</td>
<td>19.00</td>
<td>19.00</td>
<td>19.00</td>
</tr>
<tr>
<td>Camp User Course</td>
<td>April 29, 2013 8:00AM</td>
<td>August 16, 2013 8:00PM</td>
<td>19.00</td>
<td>19.00</td>
<td>19.00</td>
</tr>
<tr>
<td>Continuously Enrolled Session</td>
<td>April 29, 2013 8:00AM</td>
<td>August 16, 2013 8:00PM</td>
<td>19.00</td>
<td>19.00</td>
<td>19.00</td>
</tr>
</tbody>
</table>

**Open Enrollment Dates by Session**

<table>
<thead>
<tr>
<th>Session</th>
<th>Begin</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Academic Session</td>
<td>August 22, 2013</td>
<td>December 7, 2013</td>
</tr>
<tr>
<td>Camp User Course</td>
<td>August 22, 2013</td>
<td>December 7, 2013</td>
</tr>
<tr>
<td>Continuously Enrolled Session</td>
<td>August 22, 2013</td>
<td>December 7, 2013</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Term Enrollment Limits</th>
<th>Max Total Units</th>
<th>Max Audit Units</th>
<th>Max Wait List Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2011</td>
<td>19.00</td>
<td>19.00</td>
<td>19.00</td>
</tr>
<tr>
<td>Winter 2012</td>
<td>19.00</td>
<td>19.00</td>
<td>19.00</td>
</tr>
<tr>
<td>Spring 2013</td>
<td>19.00</td>
<td>19.00</td>
<td>19.00</td>
</tr>
</tbody>
</table>

---

**Step** | **Action**
--- | ---
18. | This student has an Enrollment Appointment and Open Enrollment Dates which are dates the student can enroll.

*Note: The example here is not representative of actual Enrollment dates.*

19. | Click the **Cancel** button.

---

Page 10
Step | Action
--- | ---
20. | Once the Schedule of Classes for a term is available, a student can search for and add classes to the Shopping Cart, which allows for one click registration once the student’s Enrollment Appointment rolls around.

*Note: For more information on how students use the Shopping Cart, refer to the Student Center Video Page ([http://uits.arizona.edu/workshops/workshop_detail?view=208](http://uits.arizona.edu/workshops/workshop_detail?view=208)).*

21. | You and the student can access a detailed class schedule.

Click the **My Class Schedule** link.
Step | Action
--- | ---
22. | In this example you want to view the student's Spring schedule. Click the **Fall 2011** option.
23. | Click the **Continue** button.
24. You can alter which classes display by checking or unchecking the boxes under **Class Schedule Filter Options**.

To apply the change, click the **filter** button.

25. Click the scrollbar.
Step | Action
--- | ---
26. | If you print the schedule, it is recommended you do so from the page specifically formatted for printing.

Click the **Printer Friendly Page** link.

[Printer Friendly Page](#)

27. | Click the scrollbar.
Step | Action
--- | ---
28. | Click the **Return to My Class Schedule** link.
29. | Click the scrollbar.
Step | Action
--- | ---
30. | To return to the student center tab, click Cancel.

Click the Cancel button.

31. | You've now seen the basics of what is available on the student center tab in Student Services Center.

It is recommended you view the Student Center Video Page (http://uits.arizona.edu/workshops/workshop_detail?view=208), which contains several videos that show students how to navigate and use some of the Student Center features.

End of Procedure.
Viewing Transfer Credit

Procedure

In Student Services Center there are two different ways to view Transfer Credit.

*Note:* You can only view Transfer Credit if you have the appropriate access.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This tutorial begins after navigating to Campus Community &gt; Student Services Center and searching for the student.</td>
</tr>
<tr>
<td>2.</td>
<td>One way to view Transfer Credit is through the tab. Click the Transfer Credit tab.</td>
</tr>
</tbody>
</table>

[Transfer credit]
3. The **Course Credits** section displays a summary of the student's Transfer Credit.

   The **Test Credits** section shows AP and other test credit.

   The **Other Credits** section shows graduate level Transfer Credit.

   Click the **Statistics** link.

4. The **Statistics** tab shows detailed information about the student's previous college and units transferred.

5. You can also see a detailed view of Transfer Credit from the **Student Center** tab.

   Click the **Student Center** tab.

6. The drop-down menu allows you to access the Transfer Credit Report.

   Click the **Group Box** drop-down list.
7. Click the Transfer Credit: Report list item.

8. Click the Go button.
Step | Action
--- | ---
9. | The Transfer Credit Report gives a summary of the transferred classes and credits. In many cases, this will be a more useful view than the transfer credit tab.

**Note:** Pay attention to the *Status* column. Only coursework marked *Posted* is officially articulated and accepted by the University of Arizona. Any other *Status* has not been evaluated yet and will not appear on the Academic Advisement Report or Transcript.

10. | Click the scrollbar.
Step | Action
--- | ---
11. | Click the **Cancel** button.
12. | While you just walked through two different ways to view Transfer Credit, viewing the report via the drop-down link on the **student center** tab is the easiest at-a-glance view.

**End of Procedure.**
Viewing the Academics Tab

Procedure

The **academics** tab displays Career, Program, Plan, Sub-Plan, and Term information. This includes enrollment, history, grades, and GPA. Depending on your access level, you can also drill down for more information and enroll a student for classes.

### Step 1
This tutorial begins after navigating to **Campus Community > Student Services Center** and searching for the student.

### Step 2
Click the **Academics** tab.
### Step 3

The **Institution/Career/Program** section contains information such as the student's current Program, Admit Term, Plan, and Requirement Term.

For a more detailed explanation of the information in this section, refer to the tutorial under *Fundamentals: The Prerequisite > Academic Structure in UAccess Student > Career, Program, and Plan: Understanding the New Vocabulary.*

### Step 4

From this page you can navigate to more detailed Program and Plan information.

Click the **Edit Program Data** button.
5. You are now viewing the Student Program/Plan component.

Many of the details in this component are the same as those visible from the **academics** tab in Student Services Center.

**Note:** For more information on the fields on this tab, as well as the additional tabs, refer to the relevant tutorials under Managing the Student Program/Plan Component > The Basics.

6. However, the **Student Degrees** tab may be useful to you.

Click the **Student Degrees** tab.
Step | Action
---|---
7. | The **Degree Checkout Stat** will display any Degrees that have been applied for, or awarded, for that Career.
   
If no Degree has been applied for or awarded, the field will be blank.

   Click the **Cancel** button.

8. | Scroll down to see additional information on the page.
   
Click the scrollbar.
Step | Action
--- | ---
9. | In the **Term Summary** section you see current and historical information.
10. | The highlighted and bolded term is the one you are viewing details for. In this example, information for Fall 2011 is displaying.
11. | You see the student's enrollment eligibility, Academic Level, any classes the student is currently registered for, and Statistics (GPA information).
12. | To view historical data click on a previous term.

Click the 2111 - **Spring 2011** link.

13. | Now that you are looking at a historical term, you can see the student's classes for that term, complete with Units, Grading, and Grades.
14. | Click the scrollbar.
15. The **Statistics** section provides term, as well as cumulative, Statistics.

16. That's it for viewing the **academics** tab in Student Services Center.

**End of Procedure.**
Viewing Academic Requirements

Procedure

This tutorial walks you through how to view Academic Requirements from the student center tab.

### Step 1

This tutorial begins after navigating to Campus Community > Student Services Center and searching for the student.

### Step 2

The Advisement Report is a degree audit that includes Taken and In Progress courses and is used to determine a student's outstanding requirements.

Viewing Academic Requirements from the student center tab is similar to generating the Advisement Report.

**Note:** For information on the details of the report, refer to the Generating an Advisement Report tutorial.

Click the Group Box drop-down list.
Step | Action
---|---
3. | Click the **Academic Requirements** list item.
4. | Click the **Go** button.
### Step 5

This report shows courses a student has taken or is currently taking and how those courses apply to the student's Degree Program.

**Click the scrollbar.**
6. For more information on the details within the report, or viewing the pdf version, refer to the *Generating an Academic Advisement Report* tutorial.

   Click the **Cancel** button.

   **Cancel**

7. This completes the tutorial on viewing Academic Requirements through Student Services Center.

   **End of Procedure.**
Generating Advisement Reports

Generating an Academic Advisement Report

Procedure

As a student progresses towards graduation, the Advisement Report analyzes all Careers, Programs, Plan information, coursework taken, grades earned, restrictions, and pre-conditions or conditions completed, to determine outstanding requirements.

This tutorial walks you through how to request and view the Academic Advisement Report.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Use the Academic Advisement Report to determine outstanding requirements and see courses Taken and In Progress towards the student's major and minor. The component used to generate the Academic Advisement Report is found by navigating to <strong>Academic Advisement &gt; Student Advisement &gt; Request Advisement Report</strong>.</td>
</tr>
<tr>
<td>2.</td>
<td>Generating a new report ensures you see the most current data. Click the <strong>Add a New Value</strong> tab.</td>
</tr>
</tbody>
</table>

![UAccess Student](Image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Enter the student's <strong>ID</strong>. Enter &quot;09182736&quot; in the <strong>ID</strong> field.</td>
</tr>
</tbody>
</table>

![Image of UAccess STUDENT interface showing Request Advisement Report with student ID and report type fields.]  

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Click the <strong>09182736</strong> list item. <strong>09182736</strong></td>
</tr>
<tr>
<td>5.</td>
<td>You must select a <strong>Report Type</strong>. Click the <strong>Report Type</strong> magnifying glass.</td>
</tr>
</tbody>
</table>
6. **Note:** If you are running the report for a student who is no longer active, you should select **Non Active Students Advisement**.

   The Non Active Students Advisement report allows you to request an Academic Advisement Report for a student who is not active at the University, such as a student on leave of absence or returning to complete a degree.

7. **Academic Advisement Report** is the value you will use most often and it is recommended you set this in your User Defaults.

   **Note:** For information on setting your defaults, refer to the tutorial under Fundamentals: The Prerequisite > Introduction > Setting User Defaults. *User Defaults 4 contains the field for Advisement Report Type is under User Defaults 4.*

   Click the **Academic Advisement Report** link.

   [Academic Advisement Report](#)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click the <strong>Add</strong> button.</td>
</tr>
</tbody>
</table>

![Image of UAccess Student interface](image)
### Step 9

The Report Date and As of Date automatically populate and, in most cases, do not need changed.

Click the Process Request button.

```plaintext
[Process Request]
```
### Step 10

Notice the symbols for Taken and In Progress. These show in the **Status** columns of the report.

**Note:** *Planned courses do not display on the Academic Advisement Report. To see those courses, refer to the Generating an Advisement Planner Report tutorial.*

### Step 11

Scroll down to see additional information.

Click the scrollbar.
12. Requirements that have been fulfilled are collapsed and requirements that haven't are expanded. You can collapse and expand any section to view requirements.

13. In this example, the student has fulfilled the Tier II Arts requirement, so that section is collapsed.

14. Click the right arrow to expand any section.

Click the Expand button.
15. Within the section is a list of courses that may be used to satisfy the requirement.

Since the student already met this requirement, you can see which course was taken.

Not all courses may be displaying so make note of any navigation at the end of the course listing.

16. To collapse the section again, click the down arrow.

Click the **Collapse** button.
Step | Action
--- | ---
17. | The Tier II Individual & Societies section is already expanded because that requirement has not been met.
18. | This student needs to complete one course, and a list of qualifying courses displays.
   | Again, not all courses may be showing so make note of any navigation at the end of the course listing.
19. | Scroll down to access the button and links at the bottom.
   | Click the scrollbar.
Step 20.
The pdf is a printable, non-interactive version of the report.

Cumulative GPA, total units, and Requirement Term are only available on the pdf report.

*Note:* There is also a View Report as PDF button at the top of this page.

Click the View Report as PDF button.
Step | Action
---|---
21. | Scroll through the report to view the student's information.

Click the scrollbar.
22. Located at the bottom of the report is the **Course History** section, which shows all coursework the student has taken.

A comprehensive Course History is only available on the pdf report and is also a place to view repeat codes applied to the student's coursework.

23. **Requirement Designation** indicates special status of a course, such as taken for Honors Credit (HNRS or HNRC), a converted DARS exception for a transfer course (TSUB), or even what equivalent level of UA Chemistry or Physics a transfer course may fulfill (e.g. CHM1=First Semester Introductory Chemistry).

Once you are done looking at the report make sure you close the appropriate window.

24. You have completed this tutorial on how to run an Academic Advisement Report.

*End of Procedure.*
Generating a Planner Report

Procedure

As a student progresses towards graduation, the Advisement Report analyzes all Careers, Programs, Plan information, coursework taken, grades earned, restrictions, and pre-conditions or conditions completed, to determine outstanding requirements.

This tutorial walks you through how to request a Planner Report.

1.  Like the Academic Advisement Report, the Planner Report shows the courses a student has Taken as well as those In Progress. In addition, it also indicates any Planned courses.

   The component used to generate the Academic Advisement Report is found by navigating to Academic Advisement > Student Advisement > Request Advisement Report.

2.  Click the Add a New Value tab.

3.  Enter the student's ID.

   Enter "09182736" in the ID field.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Click the <strong>09182736</strong> list item.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Report Type</strong> magnifying glass.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Advisement Planner Report</strong> link.</td>
</tr>
</tbody>
</table>

[Advisement Planner Report]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>Add</strong> button.</td>
</tr>
</tbody>
</table>
8. Click the **Process Request** button.
   
   `Process Request`
### Step 9

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned course are those not taken or enrolled in but those marked in the student's My Planner or Shopping Cart. Planned courses show as fulfilling requirements, even if the student is not enrolled in the course. Cumulative statistics, such as total units, are also affected so be aware that the student may not be as far along in meeting requirements as it appears.</td>
</tr>
</tbody>
</table>

### Step 10

**Note:** To view cumulative GPA, total units, Requirement Term, and Course History, click **View Report as PDF**.

### Step 11

You have completed the tutorial on **Generating a Planner Report**.

**End of Procedure.**
## Generating a What-If Report

### Procedure

This tutorial walks you through how to create the What If Report.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | The What-If Report allows you to view alternative majors, minors, and courses for a student without changing the student's current Program, Plan, or enrolled courses.  
The component used to generate the What-If Report is found by navigating to **Academic Advisement > Student Advisement > Request Advisement Report**. |
| 2.   | Generating a new report ensures you see the most current data.  
Click the **Add a New Value** tab. |
| 3.   | Enter the student's **ID**.  
Enter “09182736” in the **ID** field. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Click the <strong>09182736</strong> list item.</td>
</tr>
</tbody>
</table>
| 5.   | You must select a **Report Type**.  
Click the **Report Type** magnifying glass. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Click the <strong>What If Report</strong> link.</td>
</tr>
</tbody>
</table>

**What If Report**
### Step 7.

**Click the Add button.**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>Add</strong> button.</td>
</tr>
</tbody>
</table>
### Step 8
**Action:**
- Click the **Use Career Simulation** checkbox.

### Step 9
**Action:**
- Click the **View/Change Career Simulation** link.

*ViewChange Career Simulation*
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 10.  | The fields for the What-If Data are automatically populated with data from the previous What-If Scenario.  
Also, if the student has more than one Career, make sure you navigate to the appropriate Career using the navigation buttons.  |
| 11.  | The **Copy** button clears the previous What-If Scenario and populates the fields with the student’s current Program, Plan, Sub-Plan, and Requirement Term.  
*Note: If this is the first time the What-If Report has been run, the data fields will be blank prior to clicking Copy.*  
Click the **Copy** button.  |
Step | Action
--- | ---
12. | The system requires you to confirm you want to overwrite the existing scenario.

Click the **Yes** button.
### Step 13. Action
For students with a 2104 (Fall 2010) Requirement Term or later, your selection in the **Academic Program** field determines the values available in the **Academic Plan** and **Sub-Plan** fields.

If the Requirement Term is prior to Fall 2010, all Plans and Sub-Plans are available, regardless of the Program selected.

### Step 14. Action
If the scenario is for a different Program, enter the code.  
If you don't know the code, click the magnifying glass.  
Enter "uengr" in the **Academic Program** field.

### Step 15. Action
Click the **UENGR** list item.  

### Step 16. Action
Change the Requirement Term by entering the code.  
If you don't know the code, click the magnifying glass.  
Enter "2064" in the **Requirement Term** field.

### Step 17. Action
Click the **2064** list item.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 18. | Enter the Plan code for the What-If Scenario.  
If you don’t know the code, click the magnifying glass.  
Enter "msebsmse" in the Academic Plan field. |
| 19. | Click the MSEBSMSE list item. |
| 20. | The lowest Plan Sequence number (usually 1 or 10) should be the primary major. |
| 21. | Indicate any minors or secondary majors by adding a row. |

---

**Step 22.**  
With the Requirement Term and Academic Plan selected, you are ready to process the What-If Report.  
Click the OK button.
Step 23. Click the **Process Request** button.

[Process Request]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 24.  | This report evaluates the course requirements for the alternative major based on courses the student has already completed.  

**Note:** For information on how to read and use the report, refer to the Generating an Academic Advisement Report tutorial. |
| 25.  | You have completed this tutorial on creating a What-If Scenario.  

**End of Procedure.**
Understanding Advisor Notes

Viewing an Advisor Notes

Procedure

In this tutorial, you will learn how to view an existing Advisor Note.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | View an Advisor Note by navigating to **Academic Advisement > UA Advisor Notes > UA Note Entry**.  
**Note:** In **UAccess Student** you can view any Advisor Note in the system. |
| 2.   | There are multiple ways to search for a note. If you know the student's ID, enter the number in the **ID** field.  
However, you may also search using the other fields.  
**Note:** **Searching by the ID** is often the quickest way to locate your student and the specific note you want to view. |
| 3.   | Enter "09182736" in the **ID** field. |
4. In this tutorial you are searching by the student's ID.

   Click the **09182736** list item. 
   **09182736**

5. Click the **Search** button.

   **Search**
Step | Action
--- | ---
6. | If multiple matches display, identify the correct student and/or the appropriate note.

**Note:** In this example, because you searched by ID, all the results returned are for the same student. Each line is a different Advisor Note, as identified by the Contact Date and Note ID.

Click the 319723 link.
Step | Action
---|---
7. | If applicable, click the arrows to navigate the rows of information within each section.  
**Note:** To view details regarding the fields and sections within the Advisor Note, refer to the Creating an Advisor Note tutorial.
8. | Click the scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 9.   | Returning to the Search Results screen allows you to view other notes or search for a different student.  
Click the **Return to Search** button. |
| 10.  | You have completed this tutorial on viewing an Advisor Note.  
**End of Procedure.** |
Creating an Advisor Note

Procedure

Creating an Advisor Note allows you to save comments about student appointments and discussions.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This tutorial begins after navigating to <strong>Academic Advisement &gt; UA Advisor Notes &gt; UA Note Entry</strong>.</td>
</tr>
</tbody>
</table>
| 2.   | Since this is a new note, you need to click the additional tab.  
    Click the **Add a New Value** tab.  
    **Add a New Value** |
| 3.   | Enter the student ID for the student you are creating a note for.  
    Enter **"09182736"** in the **ID** field. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Click the <strong>09182736</strong> list item.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Add</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
6. | The **Contact Date** field defaults to the date you are entering the note, but the date can be changed if the appointment, discussion, or other action took place on a different day.
7. | Enter the **Advisor College** code.
   If you don't know the code, click the magnifying glass.
   Enter "CFA" in the **Advisor College** field.
8. | Click the **CFA** list item.
9. | You are required to identify a **Note Category**, which allows you to select the type of interaction that took place with your student.
   Click the **Note Category** magnifying glass.
Step | Action
--- | ---
10. | Select the applicable interaction from the table.

*Note: Selecting Appointment generates an email survey to the student about advising services.*

Click the **APPT** link.
### Step 11

Enter a brief description in the **Note Title** field.

Enter "Fall 2011 courses" in the **Note Title** field.

### Step 12

Although it is not a required field, you may enter a Topic.

Click the **Topic** magnifying glass.
13. Select the relevant **Topic**.

Click the **Degree Audit Review** link.

Degree Audit Review
Step | Action
--- | ---
14. | If a form is filled out during the appointment or discussion, this should be indicated in the **Form** field.

**Click the Form magnifying glass.**
### Step 15

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the scrollbar.</td>
</tr>
</tbody>
</table>
### Step 16

Choose the form you filled out.

Click the **Major Requirements Checklist** link.

[Major Requirements Checklist](#)
17. Use the **Referral** field when you refer the student to a particular office or department.

Click the **Referral** magnifying glass.
### Step 18

Select the type of **Referral** from the table.

Click the scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.</td>
<td>Click the HONORS link.</td>
</tr>
</tbody>
</table>
20. Add additional **Topics, Forms, Referrals, or Comments** relevant to the appointment or discussion by clicking the appropriate plus (+) sign.

For this student, you want to delete the Referral.

Click the **Delete** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 21.  | The system requires you confirm the deletion.  
      | Click the OK button. |
|      | ![Image] |
Step | Action
---|---
22. | In the **Comments** field enter any additional notes. These notes become part of the student's record and, although they are not viewable to students, they can be subject to subpoena. Be professional and factual and use objective language whenever possible.

**Note:** *The Advisor Note cannot be edited once it is saved, but you may add an addendum if it's a note you entered.*

Enter "**adding psyc minor**" in the **Comment** field.

23. | Click the scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 24.  | Once saved, the note cannot be deleted. To delete a note, contact your College Advising Coordinator.  

Click the **Save** button.  

![Save button](image)
## Step 25
The note indicates the NetID of the person who entered the note and the note is time and date stamped.

## Step 26
Click the scrollbar.
Step | Action
--- | ---
27. | In addition, when the note is saved a Note ID is generated, which can be used when conducting a future search.
28. | You have completed this tutorial on how to create an Advisor Note.

**End of Procedure.**
Adding an Addendum to an Existing Note

Procedure

This tutorial shows you how to add an addendum to an existing Advisor Note.

*Note:* You can only add an addendum to a Note you created.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This tutorial begins after navigating to Academic Advisement &gt; UA Advisor Notes &gt; UA Note Entry.</td>
</tr>
</tbody>
</table>
| 2.   | There are multiple ways to search for a note. If you know the student’s ID, enter the number in the **ID** field.  
However, you may also search using the other fields.  
*Note:* Searching by the ID is often the quickest way to locate your student and the specific note you want to view. |
| 3.   | Enter "09182736" in the **ID** field. |
### Step 4
Since you are searching for an existing Note, make sure you are on the **Find an Existing Value** tab.

Click the **09182736** list item.

### Step 5
Click the **Search** button.

---

### Step 6
If multiple matches display, identify and select the appropriate person and Note you are adding the addendum to.

**Note:** If a student has multiple Notes, there is a separate line for each note as identified by the Note ID.

Click the **319724** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 7.   | Since you can't edit an existing comment, adding an addendum requires you add a row and create an additional comment.  

Click the Add button. |
| 8.   | Enter the desired information into the new Comment section.  

Enter "Entered incorrect minor" in the Comment field. |
<p>| 9.   | Click the scrollbar. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>
| 11.  | Click the arrows to navigate the rows of information within the **Comment** section.  
Click the **Previous** button. |
| 12.  | The **View All** button displays all the Comments for this Note.  
Click the **View All** link. |
| 13.  | Click the scrollbar. |
### Step 14
The **Return to Search** button returns you to the UA Note Entry search screen, where you can search for another Note or navigate to another component.

Click the **Return to Search** button.

### Step 15
You have now walked through how to add an addendum to an Advisor Note.

**End of Procedure.**