

## ADVISING SNAPSHOT March 2023 Edition

### Faculty Advising Checklist

Now that we are into Fall '23 advising season, we want to share some helpful reminders and tips for appointments with your students.

#### Reflection questions to guide all appointments:

- What information do I need to provide?
- What questions do I need to ask?
- What documentation is required?
- What follow up is necessary?
- How can I use a current struggle for future success?
- What successes can I celebrate?

#### Basics of an advising appointment:

- Review previous Appointment Summary making note of any follow-up that was to be done and any "homework" the student should have completed
- Review the student's Advisement Report asking the student what courses they think they need for the upcoming semester
- Determine if the student needs a course that is only offered annually in their major
- Help student consider potential minors, certificates, and other opportunities to enhance their college education
- Discuss post college plans
- Remind student that they can contact you if they have concerns
- Explain to student how to access Appointment Summaries in Navigate

Learn how to document appointments, create campaigns, and find/message advisees in

Navigate: <https://uwosh.edu/resources/navigate/advisors/>

## Best Practices for Documentation of Advising

Documentation is crucial in the advising relationship. Documentation allows advisors and students to remember past discussions and action items and serves as an official part of the student’s record. As such, it is subject to subpoena, so records are carefully kept. FERPA also protects the confidentiality of these records. Advising records can be shared with individuals at the institution who have an educational need to know.

Document	Elements	Notes
<b>Email</b>	<ul style="list-style-type: none"> <li>• Responses to questions</li> <li>• Summary of plans</li> <li>• Call to action</li> <li>• Registration information</li> </ul>	<p>Requests to schedule a meeting are not part of the official file.</p> <p>Exception: summary email documenting multiple attempts to contact with no response</p>
<b>Appointment Summary</b>	<ul style="list-style-type: none"> <li>• Suggested courses</li> <li>• Referrals</li> <li>• Memory Joggers</li> <li>• Career interests/plans</li> <li>• Student action items</li> <li>• Advisor follow up items</li> <li>• Notes on paperwork needed/completed</li> </ul>	<p>The notes are written with the student as the audience as they are for the student.</p> <p>Notes should be objective and factual.</p> <p><b>Use this to document student interaction (meetings/phone calls/video chats, etc)</b></p>
<b>Planning Sheet Progress Evaluation</b>	<ul style="list-style-type: none"> <li>• All courses, credits, semester taken or planned to be taken (accounting for prerequisites)</li> <li>• Disclaimers</li> </ul>	<p>Be as thorough and detailed as possible. Always note that these are unofficial documents. The Advisement Report is the official document.</p>
<b>Advisement Report</b>	<ul style="list-style-type: none"> <li>• GPA</li> <li>• USP Requirements</li> <li>• Degree Requirements</li> <li>• Major Requirements</li> <li>• Graduation Requirements</li> </ul>	<p>Use screen shots if there are issues or items to be able to reference later. The Advisement Report should never be printed.</p>

### Self-reflection questions for the Advisor

As you finalize the notes, these questions can help you remember the goals of advising as a collaborative teaching and learning process, with shared responsibility between advisor and student.

1. What would a different advisor need to know? Is that clearly documented and easily understood?
2. Did this interaction accomplish the goals of teaching a student about their academics?
3. Am I doing something for the student that they can and should do for themselves?

## NAVIGATE: Reports vs. Notes



### **Same Day Service (SDS) in the UARC**

Select advisors are available for 10-minute consultations on most days of the week (varies by college). Students can call the UARC front desk at 920-424-1268 or stop by SSC 202 to schedule a 10-minute consultation. Students can begin scheduling 10-minute consultations at 8:00 AM each day. Same Day Service is available during a set time for that day only. Students can see an advisor in-person or virtually. Ten-minute consultations are available to all students, including students assigned to faculty advisors. Check out the UARC website for [hours of service](#).

Here are a few examples of reasons you would refer one of your assigned students to Same Day Services in the UARC:

- Appointment follow-up/clarification
- Change of evaluation for transfer courses/credits
- Credit Overload Request Form
- Curriculum Modification; Appeal to Repeat
- Drop/Add consent; Late Add/Drop
- Final semester Graduation Check (encourage student to apply for graduation if not already done)
- Placement test results
- Registration issues

Virtual Same Day Service consults are held using Zoom. Students receive an email notification in their UWO email that contains a Zoom link to meet with the designated advisor. Students should be ready to go at their scheduled time. Same Day Service is not available the first week of each term, over the summer or during university breaks. From time to time, due to unforeseen circumstances, Same Day

Service may be cancelled, or the times changed. Please check the UARC Facebook page or Twitter feed for any changes

## Registration Toolkit

The [Registration Toolkit](#) was developed in collaboration between the UARC and Registrar's Office. This is an all-encompassing resource to help students from pre-registration through post-registration. Here you will find how-to videos, instructions, and any necessary forms for the entire registration process. This resource was designed not only for students, but for advisors as well.

<https://uwosh.edu/registrar/registration-toolkit/>

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Brought to you by the UARC Faculty Advisor Development (FAD) workgroup

Send feedback to: [whalleye@uwosh.edu](mailto:whalleye@uwosh.edu)

The Advisory Council for Comprehensive Academic Advising

<http://www.uwosh.edu/accaa>

View previous issues of the Advising Snapshot

<https://uwosh.edu/advising/for-faculty-advisors/newsletters/>

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