



Spartan Success Network (SSN) Training

MODULE 4: ADVISING NOTES AND BEYOND

PART 1 – OVERVIEW AND TRAINING AGENDA

Jennifer Engler (jengler@ycp.edu)



SPARTAN SUCCESS NETWORK



Starfish
retention solutions

Module 4 Training Agenda



- FERPA review and SSN Resources (Part 1)
- Types of notes (Parts 2-4)
 - Part 2 – Advising and General Shared Notes
 - Part 3 – Emails and Tracking Item Notes
 - Part 4 – Appointment Based Notes
- Writing good notes (Part 5)

FERPA review

- Our relationship is with the student; they are responsible for their education, their choices, and for meeting their graduation requirements.
- Without a student-signed FERPA waiver, we cannot notify parents or legal guardians regarding:
 - students' grades
 - academic actions
 - financial matters
 - certain conduct violations
- Student records and information can be shared with school officials in an **“educational right to know”** way, which is why using the Spartan Success Network by select school officials does not violate FERPA.

SSN Resources for Faculty and Staff

www.ycp.edu/spartansuccess



RESOURCES FOR FACULTY, STAFF AND STUDENTS

Faculty and Staff Help

Student Help

SSN Faculty Liaisons

Contact Information

Faculty and Staff Help

Spartan Success Network (SSN) gives you a convenient way to keep track of your students – raising flags when you observe a pattern of behavior that concerns you, ensuring that the people on campus who can intervene are aware. It also allows your students to easily book an appointment with you or someone else who can help.

Below are a few resources to help you navigate your way through the Spartan Success Network.

Training Modules

- [Training Modules Slides](#)

Access and Navigation

- [Getting Started Guide for Faculty and Staff](#)
- [FERPA quick review](#)
- [Moodle Tools for SSN - Adding the Attendance Activity](#)
- [Guide to Filtering Student Rosters in SSN](#)

Flags, Kudos, Referrals, and To-Dos

- [Student Attendance Verification Survey Instructions](#)
- [Student Performance Progress Survey Instructions](#)
- [Email Templates: Tracking Item Notifications to Students](#)

Questions?

Feel free to contact me directly if you have any additional questions:

Jennifer Engler
jengler@ycp.edu
717-815-1550

Next session: Advising and General Shared Notes



Spartan Success Network (SSN) Training

MODULE 4: ADVISING NOTES AND BEYOND

PART 2 - ADVISING AND GENERAL SHARED NOTES

Jennifer Engler (jengler@ycp.edu)



SPARTAN SUCCESS NETWORK



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Types of Notes within SSN



- Advising Note
- General Shared Note
- Emails sent via the system
- Tracking Item comments
- Close the Loop notes
- Appointment Based notes

Advising Note

Used to document notes and correspondence related to academic advising

- Previous advising notes transferred from YCPWeb to SSN
- ALL advising notes should now be added through the SSN and made **shareable**

General Shared Note

Used by faculty and staff to document info outside academic advising and important to student success

SSN Home



- 🕒 Office Hours
- 📅 Appointment
- 👥 Group Session
- 📍 Event
- 🔧 Scheduling Wizard
- 🕒 Reserve Time

📢 System Announcement: Welcome to the SSN. If you have any questions, please refer to the information on this link: www.ycp.edu/spartansuccess.

Appointments

Show

[Spartan, Screamin' Sam](#): Today at [11:00 am](#) *General Advising Visit*
Location: LS316

[View Calendar](#)

Recent Changes

Show

Changed in

No recent changes

Flags I'm Managing

Show

Name	Flag Name
------	-----------


Locating a Student in the SSN

☰ Spartan Success Network

- Office Hours
- Appointment
- Group Session
- Event
- Scheduling Wizard
- Reserve Time

System Announcement: Welcome to the SSN. If you have any questions, please refer to the information on this link: www.ycp.edu/spartansuccess.

🔍 *spartan*

 Spartan, Screamin' Sam
starfish@ycp.edu
903246077

Appointments

Recent Changes

My Services

Show

Changed in

- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes
- Network

Student Information

- ✓ Latest Degree: N/A
- ✓ Date of Latest Degree Earned: N/A

903246077
starfish@ycp.edu

Create Note

Never Mind Submit

* Note Type

* Date

Subject

* Note

Send copy of note to yourself

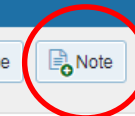
Send copy of note to student

* Note Sharing Shared Private

Note Permissions: A note type must be selected to determine the sharing permissions for this note.

* Required fields

Never Mind Submit



Create Note

* **Note Type**

* **Date**

Subject

* **Note**

Send copy of note to yourself

Send copy of note to student

* **Note Sharing** **Shared** Private

FERPA Notice: This note is disclosable to the student under FERPA

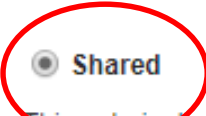
Note Permissions: People with the following roles may be able to see this note if they have a relationship with the student(s):

- Academic Leadership
- Academic Support
- Athletic Coach
- Back on Track Mentor
- Primary Advisor

[More...](#)

* Required fields

- ### PERMISSIONS:
- Academic Leadership
 - Academic Support
 - Athletic Coach
 - Back on Track Mentor
 - Primary Advisor
 - Retention Coordinator
 - Secondary Advisor
 - Student Accessibility Director
 - Student Services Leadership
 - YCCOSP Director



Create Note

* **Note Type** ▾

* **Date** 📅

Subject

* **Note**

Send copy of note to yourself
 Send copy of note to student

* **Note Sharing** Shared Private

🔒 **FERPA Notice:** This note is disclosable to the student under FERPA

🔒 **Note Permissions:** People with the following roles may be able to see this note if they have a relationship with the student(s):

- Academic Leadership
- Academic Support
- Athletic Coach
- Back on Track Mentor
- Financial Aid Counselor

[More...](#)

* Required fields

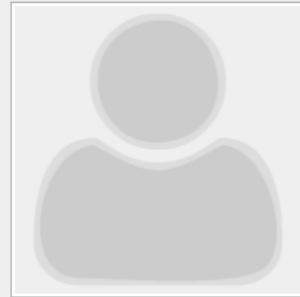
- PERMISSIONS:** ✕
- Academic Leadership
 - Academic Support
 - Athletic Coach
 - Back on Track Mentor
 - Financial Aid Counselor
 - Instructor
 - Primary Advisor
 - Retention Coordinator
 - Secondary Advisor
 - Student Accessibility Director
 - Student Services Leadership
 - Student Services Support
 - YCCOSP Director

- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes**
- Network

Created In Term: All | Written By: Anyone | Note Type: Any

Type	Subject	Written By	Date
General Shared Note	Increased stressors	Jennifer Engler Role: Academic Leadership	Today
Advising Note	Meeting to discuss next semester	Jennifer Engler Role: Academic Leadership	Today



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starfish@ycp.edu

NOTE MENU

- Edit Note
- Delete Note

Type	Subject	Written By	Date
General Shared Note	Increased stressors	Jennifer Engler Role: Academic Leadership	Today

Sam shared with me that he was experiencing some heightened stressors in his life right now. He indicated that they were acute, but most likely temporary and that he felt that he had all the necessary support. I indicated to him that I would like to put this information into the SSN so that other individuals in his network might be aware of why his performance and/or attendance might be more variable than usual. He agreed with this plan.

Type	Subject	Written By	Date
Advising Note	New course options identified for next semester	Jennifer Engler Role: Academic Leadership	Today

Email Message

Sam and I spoke about some additional options for his spring schedule and he is planning on completing PSY221, which would satisfy both his psychology minor and one of his Children and Family constellation courses.

Sent Today at 6:03 pm

Read
Unread

Questions?

Feel free to contact me directly if you have any additional questions:

Jennifer Engler
jengler@ycp.edu
717-815-1550

Next session: Emails and Tracking Item Notes



Spartan Success Network (SSN) Training

MODULE 4: ADVISING NOTES AND BEYOND

PART 3 – EMAILS AND TRACKING ITEM NOTES

Jennifer Engler (jengler@ycp.edu)



SPARTAN SUCCESS NETWORK



Starfish
retention solutions

Types of Notes within SSN



- Emails sent via the system
- Tracking Item comments
- Close the Loop notes

Emails Sent via the System

Screamin' Sam Spartan

- Flag
- Referral
- To-Do
- Kudos
- Message**
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes
- Network

Student Information

- ✓ Latest Degree: N/A
- ✓ Date of Latest Degree

Send Message

An email or text message will be sent depending on the student's email notification preferences. If many recipients will receive the message via text messaging you may want to enter a shorter text version below.

* **Subject**

* **Email**

Send copy to yourself

* Required fields

Never Mind Submit

FERPA standards protect

Emails Sent via the System



Screamin' Sam Spartan

- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes**
- Network

Created In Term: All | Written By: Anyone | Note Type: Any

Type	Subject	Written By	Date
Flag Comment	Clear Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership	Today
Flag Comment	Raise Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership	Today
Appointment Comment	Appointment with Screamin' Sam Spartan on 12/27/2018 for General Advising Visit	Jennifer Engler Role: Academic Leadership	Today
Flag Comment	Follow-up contact Well-Being Concern	Jennifer Engler Role: Academic Leadership	Today
Message	Checking in on Spring Registration	Jennifer Engler Role: Academic Leadership	Today
Email Message Hi Sam, I noticed that you had not yet registered for the classes we discussed at our last meeting and wanted to see if there was anything I could do to assist in this process. Dr. Engler		Sent Today at 8:57 am Read Today at 9:08 am	
Advising Note	New course options identified for next semester	Jennifer Engler Role: Academic Leadership	12-19-2018

Tracking Item Comments

Screamin' Sam Spartan

Flag Referral To-Do Kudos Message Note Appointment File

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes
- Network

Student Information

✓ Latest Degree: N/A

✓ Date of Latest Degree Earned: N/A

Raise Flag for Screamin' Sam Spartan

Never Mind Save

* Flag

Course Context


Comment

- General FYI**
If you simply wish to share information about a student with their advisor and do not expect any action to take place, raise this flag. The student will not be notified.
- Well-Being Concern**
Raise this flag if a student exhibits signs of emotional, social, physical, or personal distress. NOTE: Concerns about threatening behavior or safety should be directed to Campus Safety immediately: 717-815-1314.


Permissions: A tracking item must be selected to determine the sharing permissions

* Required fields


Never Mind Save

 **Academic Performance Concern**


Raise this flag if a student is demonstrating a pattern of unsatisfactory, disorganized, unprepared, incomplete, and/or late work.

 **Attendance Concern**


Raise this flag if a student is regularly late to class, consistently leaves class early, and/or misses appointments without notification. NOTE: Numerous unexcused absences will be flagged automatically via Moodle attendance tracking.

 **Classroom Conduct Concern**


Raise this flag if a student is disruptive in class, does not participate, and/or leads class discussions off-topic in inappropriate ways.

 **General FYI**

If you simply wish to share information about a student with their advisor and do not expect any action to take place, raise this flag. The student will not be notified.

 **In Danger of Failing**

If a student is in danger of failing your course, then please raise this flag.

 **No Show**

If a student has never attended your class, then please raise this flag. NOTE: This flag is being used in lieu of paper-based no show reporting coordinated by the Registrar's Office.

** Disclosable under FERPA*

 **Warning Grade**

Use this flag during the official warning grade reporting period to notify students who have a current overall course grade that is less than 2.0.

** Disclosable under FERPA*

 **Well-Being Concern**

Raise this flag if a student exhibits signs of emotional, social, physical, or personal distress. NOTE: Concerns about threatening behavior or safety

Raise Flag for Screamin' Sam Spartan Never Mind Save

* Flag

Course Context

Comment *Add comments indicating why the Flag item is being created.*

Raise Flag for Screamin' Sam Spartan Never Mind Save

* Flag

Course Context

* Comment *Add comments indicating why the Flag item is being created.*

Student View: The student can view this item and the notes entered about it.

Permissions: People with the following roles may be able to see this tracking item if they have a relationship with the student(s):

- Academic Leadership
- Academic Support
- Athletic Coach
- Financial Aid Counselor
- Instructor

[More...](#)

Student View: The student cannot view this item.

Permissions: People with the following roles may be able to see this tracking item if they have a relationship with the student(s):

- Secondary Advisor
- Primary Advisor
- Retention Coordinator
- Creator

SSN Resources for Faculty and Staff

www.ycp.edu/spartansuccess



RESOURCES FOR FACULTY, STAFF AND STUDENTS

Faculty and Staff Help

Student Help

SSN Faculty Liaisons

Contact Information

Faculty and Staff Help

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- [Guide to Filtering Student Rosters in SSN](#)

Flags, Kudos, Referrals, and To-Dos

- [Student Attendance Verification Survey Instructions](#)
- [Student Performance Progress Survey Instructions](#)
- [Email Templates: Tracking Item Notifications to Students](#)



SPARTAN SUCCESS NETWORK

Tracking Item Student Notifications

Updated 10-2-2018

Click on the title of a Tracking Item below to be taken directly to the corresponding message template.

FLAGS
Academic Performance Concern*
Attendance Concern*
Classroom Conduct Concern*
Course Withdrawal
Five Flags Raised
In Danger of Failing*
No Show
Six Unexcused Absences
Three Flags Raised
Warning Grade*
Well-Being Concern*

TO-DOS
Leave of Absence/Withdraw from College Forms*

KUDOS
Keep Up the Good Work*
Outstanding Academic Performance*
Showing Improvement*

REFERRALS
Academic Advising Center Referral
Academic Support Center Referral
Business Office Referral
Career Development Center Referral
Counseling Services Referral
Residence Life Referral
Retention Referral
Student Accessibility Services Referral
Study Abroad Center Referral
Writing Center Referral

FLAGS

Academic Performance Concern

Raise this flag if a student is demonstrating a pattern of unsatisfactory, disorganized, unprepared, incomplete, and/or late work.

TEMPLATE

Dear [Student First Name]:

I'm contacting you because I am concerned about
in [Course Name].

[Raiser's Notes]

Please contact me to make an appointment for
your work and identify resources to help you succeed.

Sincerely,

Professor [Raiser Name]
[Raiser Email]
[Raiser Phone]

Raise Flag for Screamin' Sam Spartan

Never Mind Save

* Flag Well-Being Concern

Course Context No Course

Comment Add comments indicating why the Flag item is being created.

Student View: The student can view this item and the notes entered above.

Permissions: People with the following roles may be able to see this tracking item if they have a relationship with the student(s):

- Academic Leadership
- Academic Support
- Athletic Coach
- Financial Aid Counselor
- Instructor

[More...](#)

Screamin' Sam Spartan

- Flag
- Referral
- To-Do
- Kudos
- Message
- Notes

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes
- Network

Student Information

- ✓ Latest Degree: N/A
- ✓ Date of Latest Degree Earned: N/A

FERPA standards protect student data.

Raise Flag for Screamin' Sam Spartan

Never Mind Save

* Flag: Well-Being Concern

Course Context: No Course

Comment: Based on feedback from you and several instructors, it appears that your stressors continue to impact your attendance and participation in your classes.

Student View: The student can view this item and the notes entered above.

Permissions: People with the following roles may be able to see this tracking item if they have a relationship with the student(s):

- Academic Leadership
- Academic Support
- Athletic Coach
- Financial Aid Counselor
- Instructor

More...

* Required fields

Never Mind Save

[Spartan Success Network] Please Come See Me

On Dec 27, 2018, at 9:35 AM, jengler@ycp.edu wrote:

Dear Screamin' Sam:

I am contacting you because I'm concerned about your well-being.

Based on feedback from you and several instructors, it appears that your stressors continue to impact your attendance and participation in your classes.

Please contact me to make an appointment to discuss how I may help you find some support at the college.

Sincerely,

Jennifer Engler

jengler@ycp.edu

717-815-1550

Screamin' Sam Spartan

- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking**
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- Network

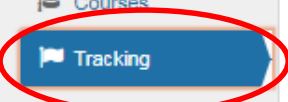
View: Status: Active Resolved Both Created By: Anyone Me

Item Name	Status	Created	Due	Assignee	Context
Well-Being Concern	Active	Today by Engler, Jennifer			

Item Name	Status	Created	Due	Assignee	Context
Well-Being Concern	Active	Today by Engler, Jennifer			

Journal

Today Engler, Jennifer	Raise Comment Based on feedback from you and several instructors, it appears that your stressors continue to impact your attendance and participation in your classes.
---------------------------	--



Screamin' Sam Spartan

- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes**
- Network

Type	Subject	Written By	Date
Flag Comment	Raise Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership	Today
Message	Checking in on Spring Registration	Jennifer Engler Role: Academic Leadership	Today
Advising Note	New course options identified for next semester	Jennifer Engler Role: Academic Leadership	12-19-2018
General Shared Note	Increased stressors	Jennifer Engler Role: Academic Leadership	12-19-2018
Advising Note	Meeting to discuss next semester	Jennifer Engler Role: Academic Leadership	12-19-2018

Type	Subject	Written By
Flag Comment	Raise Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership
Based on feedback from you and several instructors, it appears that your stressors continue to impact your attendance and participation in your classes.		
Message	Checking in on Spring Registration	Jennifer Engler Role: Academic Leadership
Advising Note	New course options identified for next semester	Jennifer Engler Role: Academic Leadership
General Shared Note	Increased stressors	Jennifer Engler Role: Academic Leadership
Advising Note	Meeting to discuss next semester	Jennifer Engler Role: Academic Leadership

Close the Loop notes – Comment & Clear



Screamin' Sam Spartan

- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking**
- Meetings
- Notes
- Network

Hover over flag [dropdown] Status: Active Resolved Both Created By: Anyone Me

Item Name	Status	Created	Due	Assignee	Context
Well-Being Concern	Active	Today		by Engler, Jennifer	

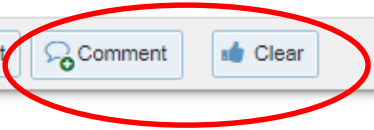
Screamin' Sam Spartan

SUMMARY | STUDENT INFO

Well-Being Concern

Raised by Engler, Jennifer (Today)

Edit Comment Clear



Commenting on Tracking Items

Create Note Never Mind Submit

Subject

* Note

Send copy of note to yourself

Send copy of note to student

* Required fields Never Mind Submit

Item Name	Status	Created	Due	Assignee
Well-Being Concern	Active	Today by Engler, Jennifer		

Journal

Today
Engler, Jennifer

Follow-up contact
I have still not heard back from my initial outreach to Sam. I will give him until the end of the week Services.

Today
Engler, Jennifer

Raise Comment
Based on feedback from you and several instructors, it appears that your stressors continue to impact your classes.

Screamin' Sam Spartan

Flag Referral To-Do Kudos Message Note Appointment File

Overview Success Plans Courses Tracking Meetings **Notes** Network

Created In Term	Written By	Note Type
All	Anyone	Any

Type	Subject	Written By
Flag Comment	Raise Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership
	Based on feedback from you and several instructors, it appears that your stressors continue to impact your attendance and participation in your classes.	
Flag Comment	Follow-up contact Well-Being Concern	Jennifer Engler Role: Academic Leadership
	I have still not heard back from my initial outreach to Sam. I will give him until the end of the week and then pursue a referral to Counseling Services.	
Message	Checking in on Spring Registration	Jennifer Engler Role: Academic Leadership

Clearing Tracking Items

Screamin' Sam Spartan

Flag Referral To-Do Kudos Message Note Appointment File

- Overview
- Success Plans
- Courses
- Tracking**
- Meetings
- Notes
- Network

Hover over flag

Item Name	Status	Created	Due	Assignee	Context
Well-Being Concern	Active	Today by Engler, Jennifer			

Screamin' Sam Spartan

SUMMARY STUDENT INFO

Well-Being Concern

Raised by Engler, Jennifer (Today)

Edit Comment **Clear**

Today
Engler, Jennifer

Flag Cleared

Comment: Sam stopped by this afternoon. He indicated that he has completed an intake appointment and another appointment scheduled in two weeks. Although he continues to experience some heightened anxiety, additional support would help.

Screamin' Sam Spartan

- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes**
- Network

Created In Term	Written By	Note Type
All	Anyone	Any
Type	Subject	Written By
Flag Comment	Clear Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership
Flag Comment	Raise Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership
Flag Comment	Follow-up contact Well-Being Concern	Jennifer Engler Role: Academic Leadership
Message	Checking in on Spring Registration	Jennifer Engler Role: Academic Leadership
Advising Note	New course options identified for next semester	Jennifer Engler Role: Academic Leadership
General Shared Note	Increased stressors	Jennifer Engler Role: Academic Leadership
Advising Note	Meeting to discuss next semester	Jennifer Engler Role: Academic Leadership

Updating Others' Tracking Items



Screamin' Sam Spartan

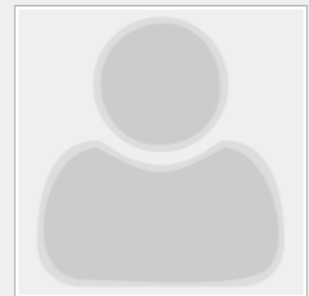


- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Info
- Success Plans
- Courses
- Tracking**
- Meetings
- Notes
- Network

View: Status: Active Resolved Both Created By: Anyone Me

Item Name	Status	Created	Due	Assignee	Context
Well-Being Concern	Active	01-03-2019 by Sefton, Renee			
Keep Up the Good Work	Active	11-15-2018 by Landau, Joshua			Design Analysis I (PSY270.101_Fall2018)
Academic Performance Concern	Active	11-15-2018 by Landau, Joshua			
Attendance Concern	Active	11-15-2018 by Landau, Joshua			
Five Flags Raised	Active	11-11-2018 by System			Student has 5 or more active flags in the system.



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starfish@ycp.edu

Item Name	Status	Created	Due	Assignee	Context
Well-Being Concern	Active	01-03-2019 by Sefton, Renee			

Journal

01-03-2019
Sefton, Renee

Raise Comment
Based on feedback from you and several instructors, it appears that your stressors continue to impact your attendance and participation in your classes.

Clear flag for Screamin' Sam Spartan

[Show flag details](#)

Add a comment:

Send a message to Sefton, Renee to close the loop

To Sefton, Renee

[Copy my comment](#)

Type a message for Sefton, Renee about clearing this flag.

* Required fields

Never Mind Submit

Create Note

Never Mind Submit

Subject

* Note

Send copy of note to yourself

Send copy of note to student

Send copy of comment to flag raiser

* Required fields

Never Mind Submit

Questions?

Feel free to contact me directly if you have any additional questions:

Jennifer Engler
jengler@ycp.edu
717-815-1550

Next session: Appointment Based Notes



Spartan Success Network (SSN) Training

MODULE 4: ADVISING NOTES AND BEYOND

PART 4 – APPOINTMENT BASED NOTES

Jennifer Engler (jengler@ycp.edu)



SPARTAN SUCCESS NETWORK



Starfish
retention solutions

Types of Notes within SSN


- Appointment Based Notes

- Office Hours
- Appointment
- Group Session
- Event
- Scheduling Wizard
- Reserve Time

System Announcement: Welcome to the SSN. If you have any questions, please refer to the information on this link: www.ycp.edu/spartansuccess.

Appointments

Show **Next 7 days**

 [Spartan, Screamin' Sam](#): Today at [11:00 am](#) *General Advising Visit*
Location: LS316

Recent Changes

Show **Created Tracking Item**

No recent changes

Add Appointment Never Mind

Scheduling

Outcomes

SpeedNotes

With

* People in Active terms All terms

* Student

* When to

* Where


* Reason

Course

* Sharing Shared Private


Detailed Description


Enter a detailed description about appointment. This is viewable by the student with whom the appointment is made.


 Permissions: People with the following roles may be able to see this appointment if they have a relationship with the student


- Athletic Coach


☰ Spartan Success Network


 Office Hours


 Appointment

 Group Session

 Event

 Scheduling Wizard


 Reserve Time

 **System Announcement:** Welcome to the SSN. If you have any questions, please refer to the information on this link: www.ycp.edu/spart

Appointments

Hover over calendar





Show

 [Spartan, Screamin' Sam](#): Today at [11:00 am](#) *General Advising Visit*
Location: LS316


Screamin' Sam Spartan
903246077


DETAILS


PERSON INFO


-  Today at 11:00 am
-  Scheduled: Today at 11:01 am
-  LS316
-  General Advising Visit




 [View Calendar](#)

 Outcomes

 Edit

 Cancel

 View

Appointment Scheduling & Sharing


Edit Appointment


Never Mind Submit

Scheduling Outcomes SpeedNotes

With

* People in Active terms All terms

With  [Spartan, Screamin' Sam](#)

* When  to

* Where

* Reason

Course

* Sharing Shared Private

Detailed Description

Enter a detailed description about the appointment. This is viewable by you and the student with whom the appointment is made.

Permissions: People with the following roles may be able to see this appointment if they have a relationship with the student(s):

- Athletic Coach
- Back on Track Mentor
- Calendar Manager
- Primary Advisor
- Secondary Advisor

* Required fields

Never Mind Submit

Appointment Comments

Edit Appointment

Never Mind Submit

Scheduling Outcomes SpeedNotes

Time [?] to

Attendance Student missed appointment

Email Send a copy of note to student

Comments

Comments are notes about the appointment, viewable only by you and other people with whom the appointment is shared. These notes can be edited only by you before or after the appointment for record-keeping purposes.

Permissions: People with the following roles may be able to see this appointment if they have a relationship with the student(s):

- Athletic Coach
- Back on Track Mentor
- Calendar Manager
- Primary Advisor
- Secondary Advisor

More...

* Required fields

Never Mind Submit

Appointment SpeedNotes

✱ ✕

Edit Appointment

Never Mind Submit

Scheduling Outcomes SpeedNotes

Check off the topics discussed and activities completed in this meeting.

Academic Advising

<input type="checkbox"/> Academic status concerns	<input checked="" type="checkbox"/> Discussion of career goals
<input type="checkbox"/> Completed degree audit	<input checked="" type="checkbox"/> Registration for classes
<input checked="" type="checkbox"/> Discussion of academic goals	<input type="checkbox"/> Transfer credit review

Student Support

<input type="checkbox"/> Addressed time management	<input type="checkbox"/> Financial aid process
<input checked="" type="checkbox"/> Adjustment to college	<input type="checkbox"/> Learning disability
<input type="checkbox"/> Balancing academic goals and life goals	<input checked="" type="checkbox"/> Review of campus resources
<input type="checkbox"/> Discussed study skills	<input type="checkbox"/> Transportation issues
<input type="checkbox"/> Family concerns	

✱ Required fields Never Mind Submit

Screamin' Sam Spartan

- Flag
- Referral
- To-Do
- Kudos
- Message
- Note
- Appointment
- File

- Overview
- Success Plans
- Courses
- Tracking
- Meetings
- Notes**
- Network

Created In Term	Written By	Note Type	
All	Anyone	Any	
Type	Subject	Written By	Date
Appointment Comment	Appointment with Screamin' Sam Spartan on 12/27/2018 for General Advising Visit	Jennifer Engler Role: Academic Leadership	Today
Email Message	Met with Sam to review long-term career goals and how to plan his undergraduate work to best align with/prepare him for those goals.	Sent Today at 11:15 am	Read Unread
SpeedNotes: Academic Advising	Discussion of academic goals, Discussion of career goals		
Student Support	Adjustment to college, Review of campus resources		
Flag Comment	Clear Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership	Today
Flag Comment	Raise Comment Well-Being Concern	Jennifer Engler Role: Academic Leadership	Today

Questions?

Feel free to contact me directly if you have any additional questions:

Jennifer Engler
jengler@ycp.edu
717-815-1550

Next session: Writing Good Notes



Spartan Success Network (SSN) Training

MODULE 4: ADVISING NOTES AND BEYOND

PART 5 – WRITING GOOD NOTES

Jennifer Engler (jengler@ycp.edu)



SPARTAN SUCCESS NETWORK



Starfish
retention solutions

Advising Notes – WHY we do them



Documenting and sharing advising information enhances the student experience because it:

- Communicates important information about a student with other relevant college personnel
- Increases continuity and coherence of advisors' conversations
- Helps with planning next steps
- Jogs an advisor's memory prior to return visits

Advising Notes – HOW we do them



ALWAYS assume notes can be viewed by students, their families, or general public

Be factual and appropriate in conveying:

- the substance of meeting
- goals and outcomes
- any agreed-upon follow-up activities

For personal/sensitive info, use general non-descript language and good judgement to describe the situation

Always document a referral; it indicates you did something about the student's situation

Practice Example 1

Situation: A student informs you that she is not doing well in course work despite the fact that she is using every tutoring/learning assistance resource available. She has told you that she has ADHD and used an IEP in high school. Based on this information, you refer her to Student Accessibility Services.

Appropriate Advising Note: Jane came in to discuss her lack of success in her course work this term. After an extensive conversation of how she is approaching her schoolwork now vs. in high school, I referred her to Student Accessibility Services.

Practice Example 2

Situation: You meet with a student related to a scheduling adjustment and he was extremely rude and not flexible with scheduling. The scheduling process with him was really hard.

Too Much Information: Met with Bill related to his request to adjust his schedule. Bill demanded to have all of his classes after 12:30 p.m. and would not take a math course despite my suggestions. Bill was extremely rude.

Appropriate Advising Note: Met with Bill related to his request to adjust his schedule. He resisted my suggestions. I explained the potential impacts of his preferences. We worked out his schedule after much deliberation. He elected not to take a math course against my advice.

Questions?

Feel free to contact me directly if you have any additional questions:

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