Academic Advising
Advising Records for Academic Coach and Tutor (with no access to Student Records)

Overview

Coaches and tutors are generally students themselves. To use AdRx, they must be in one of the roles Academic Coach or Tutor and the ADS group SY-ITS-ADRX-CASONLY. This allows them to login to AdRx – via the faculty/staff button – without the Duo token. The student must have completed the Acceptable Use Agreement for Access to Technology and Information Resources at IU. Click here to view the agreement.

Steps

Advising Records: student search and leaving notes

1. Go to http://adrx.iu.edu

2. Click Faculty/Staff Login.

3. Enter your Username and Passphrase if prompted.
4. To get help, report a problem, or make a suggestion, click the Report a problem or make a suggestion about AdRx link.

5. To search for a student, click the Student Search link.

6. Click anywhere in the search results row and the student's information page will display.

7. To add an Advising note, click Add New Advising Note.
8. Select **Contact Type** and **Advising Purpose**.

9. **Discussion Topics** are available but not required.

10. You may enter a Role note. This will be viewable only to others in the same role. If you think the note should be seen by professional academic advisors, click on the box to 'Publish this note to Internal Notes.' This is almost always a good idea, and should be adopted as a general practice. You can submit or Save Draft (for details about leaving notes, click [here](#) and select *Advising Notes.* This role does not have all the functionality described for academic advisors.

11. When you click **Submit**, the note becomes part of the student record and cannot be edited. If you click **Save Draft**, you can return to the home page (the ADRX logo will link to the home page) and your drafts will be waiting for you to edit and submit.

12. If you click **Close**, you can close the note, return to the information page, click **Refresh**, and your note will show in the Advising Notes area.
Legal and ethical issues with notes

Students have specific rights under FERPA

1. The right to inspect and review a student's education records
2. The right to amend inaccurate or misleading information
3. The right to consent or not consent to disclosure of personally identifiable information
4. The right to file a complaint against an educational institution

There is information about FERPA, including an online tutorial as well as the use of FERPA in SIS at http://registrar.indiana.edu/policies/ferpa/student-privacy-introduction.shtml and an FAQ at http://registrar.indiana.edu/policies/ferpa/student-privacy-faq.shtml

Student Viewable notes exist, but are not available in this role.

Many schools & programs at IU have been using computer-based advising contact systems for quite a while. Generally student viewable notes (not available for this role) have not existed and thus have not been available to students. The purpose of student viewable comments is to provide the student with access to information s/he may need to know or be reminded of, such as, "I met with my advisor but lost the sheet and she said there were two things I really needed to do…" Examples include notes such as:

- (Student) should contact former school ASAP and have credits earned sent to Office of Admissions.
- (Student) should update address and phone information via One.IU.

Academic Coaches and Tutors do not have the right to publish student viewable notes at this time. An academic advisor or administrator can publish a note to a student if desired.

Improved student contact is supported when other kinds of notes can be stored too. In general these will go on the Internal Notes tab which is not viewable in self-service. Examples might include student comments relevant to their academic progress or advisors' professional observations.

- Information that will personalize future meetings: Tom loves to fish and is a member of the chess club.
- The student said, "I am just not at all sure if Psychology is the right major for me, but I'm a junior and just don't know if I can finish. I have to graduate in 4 years." Were other majors/options discussed?
- Math placement score recommended supplemental Math, but student expressed intention to enroll in calculus.
- Or an advisor may wish to note (carefully) that a referral was made, such as to an academic help program, a job fair, or campus resource.

The standard is that notes on information (for which an academic coach is qualified) specifically relating to the student's academic record are appropriate for this system, and otherwise they're not, especially notes of a personal nature about the student (sexual assault, substance abuse, etc.) It is appropriate to note that professional behavior and expectations were discussed. It is appropriate to note that a student smelled of alcohol, it is not appropriate to note that the student was intoxicated. It is appropriate to note that a student spoke very quickly, it is not
appropriate to note that a student ‘seemed agitated.’ Do you see the difference? You are a competent authority on exactly what you observed, but not to diagnose.

**Students may request a copy of the advising contact notes entries anytime they wish.** This includes information on the Internal Notes tab as well as Role notes. It is very important that Academic Coaches and Tutors enter only information which they are qualified to give into the system. We are qualified to quote a student’s verbal behavior, *as it relates to their academic progress*, but are generally not qualified (in the context of an advising contact) to state that a student is ‘depressed.’

A distinct problem from the legal issue is **celebrity**, which falls into a special judgment area. This includes not only sports stars and the children of the famous, but also the children of high-profile faculty and staff on campus or another IU campus. Academic Coaches and Tutors may use the Advising Records system legally, follow their academic unit policy, and will be on solid ground, yet even so may choose to not enter certain information into Advising Records. In our culture, celebrity brings certain consequences to all who come in contact with it. Coaches should envision that anything they enter into Advising Records might appear on the national news, through no fault of their own, but with their name all over it. It may be the case that at least some coaches will not use Advising Records to track contacts with certain students.

**Effective Use**

Advising note-writing is an art, and like all art there are many ways to approach it well. The key distinction that an advisor needs to have in mind when entering notes is not ‘Does this make sense to me (now)?’ but ‘Will this make sense to me and other staff next year?’ The goal is that each coach, tutor, or advising group, will constantly work at getting better at being able to quickly and consistently log information that is useful in the long term. A great deal of dispute, unhappiness, and numbers of student petitions can be avoided or created by advising notes.

There is a great deal of literature about varying schools’ policies about what happens when an advisor or school official tells a student something, and how that may or may not be honored, and what liability may ensue. But no matter what policy you work under, or style of note keeping you prefer, three elements should be present.

- **Assumptions:** based on what did I give advisement? What are the assumptions I made? For example, in a graduation check, “Assuming successful completion of current enrollment, the student may complete (five courses) in the spring and graduate in May.” This is often the hardest skill to develop, but is most important in being able to understand notes after months have passed: What is my point of reference in giving the advisement? Even the best note writers sometimes later cannot later make sense of what they meant in a note, which becomes important when a student petitions for a special allowance based on what a representative of IU said. But this can be kept to a minimum when notes include the conditions under which their advice is accurate. Advising for post-overseas study is one of many examples: be clear about what the student is expected (assumed) to complete while overseas before attesting in print to what she should enroll in when she gets back to IU.

- **Advice:** be as specific as possible about what it is that you have told the student, and what it is that you and the student have agreed upon. There are countless instances where students have believed that an advisor told them X, but in fact the advisor told them Y. Communication about academic details is very context dependent and easy to misunderstand. This gets doubly important when the advisor is in one academic unit and the student is reporting the dispute to a different academic unit. It is very helpful when the advisor has clearly written down exactly what s/he told the student. But if the notes are vague, then such disputes can be difficult to resolve.

- **Consequences:** and/or follow-up. What happens if the advice is followed? Should the staff and student expect anything? It is often the case that apparently the student heard something
different from what the advisor said, or thought he said. When expectations of all are clearly documented, it helps a great deal to sort out later misunderstanding.

Further information about these issues as they are understood in a national context may be found at the link below. There is also information about Advising Notes policies at other schools, and about many issues related to this topic. http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Legal-issues-primer.aspx