Overview
The Advising Records (AdRx) application provides authorized users the ability to add advising notes (also termed as contact records) to a student’s advising record. Within AdRx, users can add note to a scheduled appointment, create a new contact record, add an enrollment plan with a note, view all advising notes for the student (depending on the user role in AdRx), add a document to a note, or add an addendum to an existing contact record.

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Steps
Logging into AdRx
1. Navigate to One.IU (one.iu.edu).
2. In the search field, type “AdRx” or “advising records” and press ENTER.
3. Click on the Advising Records (AdRx) task.
4. If you are not currently signed in with your CAS credentials, enter your Username, Passphrase, and method of Two-Step Duo authentication at the prompts.
5. Click **Faculty/Staff Login**.

6. The AdRx main page is displayed.

7. From the AdRx main page, search for a student (refer to Student Search job aid for more information).

8. From the search results, click within the student’s row to display that student’s **Information** workspace.
Adding an Advising Note

1. First, determine if the note is a new contact record or an appointment note:

   - If this is a new contact record (not related to a scheduled appointment), click **Add New Advising Note** in the student’s *Information* workspace.

     ![Add New Advising Note](image)

     Note if there is an upcoming or past student appointment, a message is displayed ensuring that the note you are creating is not related to a scheduled appointment; confirm by clicking **YES, create a contact note** in the pop-up.

   - If this is an appointment note (related to a scheduled appointment):

     In the *Upcoming Appointments* table (in the student’s *Information* workspace), click **Add appointment note** in the appointment’s row.

     ![Upcoming Appointments Table](image)

     OR

     If you are the scheduled advisor, click **Appointments** in the AdRx left panel to access your *Appointments* page, then click **+ Note** next to the desired appointment.

     ![Appointments Page](image)

     - AdRx allows appointments notes to be drafted early in preparation for a future appointment; they can be saved as draft but not submitted until the day of the appointment.

     - Overdue appointment notes are indicated by ☄️ in the *Upcoming Appointments* table; they can also be directly accessed by clicking **Overdue Appointment Notes** from the AdRx left panel.

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The *Add New Contact Record* or *Add Appointment Contact Record* page is displayed. Both pages are very similar.

2. Select an option from **Contact Type**.

If adding an appointment note, **Contact Type** is preselected to the appointment type that was scheduled. This field can be updated if the meeting type was changed, the appointment was canceled, or the student did not show up to the appointment. Note that appointment cancelation or a no show update can also be accomplished through the Student Appointment Scheduler (SAS).

3. Select an option from **Advising Purpose**.

4. If appropriate, select **Pre-Professional Interests** and **Exploratory Interests** (Exploratory Interests options are visible to IUB advisors only). Hold down the **CTRL** key to select multiple values in each field.

5. Select the appropriate **Discussion Topics** from the list.

6. If you want to view a summary of the student’s academic record, click **Show Academic Snapshot**.

This information is taken directly from the Unofficial Transcript and includes current Program/Plan Stack (Academic Objective) as well as term and cumulative data for the most recently graded, currently enrolled, and future enrolled (when applicable) terms.
7. Determine the comment type and compose the note. AdRx provides three types of comments that determines who can view them.
   - To add comments you want the student to view at any time, type them under the *Advising Comments* tab.
   - To add notes for internal use viewable by other AdRx staff with appropriate security, click on the *Internal Notes* tab and type the comments. The student will not see these notes when viewing their advising record.
   - *Advisor Only Note* is a type of note that is viewable to only Academic Advisor roles. These roles include Academic Advisor, Faculty Academic Advisor, Advising Supervisor, and Advising Administrator.

This *Advisor Only Note* type is not viewable to the student through the Student Center. This type of note is different from an *Internal Note* in that it is limited to only the roles noted above. This is a place to leave notes that may be important for other academic advisors to know, but may not be appropriate to share with other AdRx role types, such as Registrars, Career Services, Financial Aid, etc.

**NOTE:** In accordance with FERPA rules, a student can view any or all of their academic record, including these notes, upon request.

8. To add an Enrollment Plan to the advising note, click *Create Enrollment Plan*. (If you are not adding an enrollment plan, proceed to step 9.)
a. Either select an existing stack from the choices given or click the radio button **Choose a different stack** and select the appropriate options from the drop-down lists under the *Academic Information Advised For* section.

b. After selecting or adding the academic information, click **Add Term**.

c. Select the Institution, Career, and Term.

d. Click **Apply**.
e. Click Add Course to Term.

f. Enter at least the **Subject Area** and the **Course**. If this is a variable credit course, select the appropriate number of **Units**. The other fields are optional. Note that instead of typing in the information, if you either click on the field, or tab to it and press the space bar, you can then select from a drop-down list.

   - The **Note Only** checkbox provides the ability to add a course note and assign units without assigning a specific course. This may be used as a placeholder of sorts. Checking the **Note Only** box will disable all fields except for **Units** and the **Course Note**.

   - A course can be chosen as an alternate for another course. Checking the **Alternate** checkbox to the right of the course will flag it as an alternate. A course note may be added to give more specific information to the student.

g. Click **Apply**.

h. To add another course, click **Add Course to Term**.

i. To remove a course from your list, click **Remove**.
j. If you added a course note and would like to edit it before submitting the enrollment plan, click **Edit Course Note**.

k. To remove this enrollment plan from the contact, first remove any course(s) added, remove the term, then click the now displayed **Remove Enrollment Plan From Contact**.

9. To save a draft of your contact record, click **Save Draft**. (See page 15 of this document for more information on retrieving saved drafts.)

10. To delete the draft copy, click **Delete Draft**.

11. When your advising notes are complete and ready for submission, click **Submit**.

- If an appointment note was submitted, it is recorded under *Advising History* and the appointment contact loop is now closed in AdRx. No other users can create and submit an appointment note for this appointment, though another user that saved a draft prior to your submission can still submit or delete that draft.

- Once an advising note has been submitted, it cannot be deleted. If a mistake was made, add a new note correcting the error.

- If a note was accidentally submitted for the wrong student, it can be inactivated. The user or administrator should click on **Report a problem or make a suggestion about AdRx** in the bottom left of the page. This will initiate an email to IU-UITS-AA. Explain the situation in your email and they will inactivate the record for you. Include in the message the student’s **name**, **ID**, and the **Contact ID** number.

**Important**: If a note was accidentally submitted for the wrong student, it is the best practice to first record the note on the correct student’s record and click **Report a problem** to request the wrong one be inactivated.
Academic Advising: Advising Records (AdRx) Advising Notes

Viewing Advising Notes in the Information Workspace

The Advising History displays a list of advising contact records for the student.

![Advising History](image)

Clicking on the desired contact record opens a window with detailed information.

Understanding In-row Note Icons

There are three icons that may appear within an advising note instance.

- A yellow lock 🗝️ indicates that there are no detailed notes included. The contact may include only minimal information about the contact, such as Contact Type and Advising Purpose. At times, it may only include an Enrollment Plan.

- The blue lock 🗝️ indicates that there are some role notes attached to this contact that may not be viewable from your current role. The contact may or may not include some notes that are viewable as well.

- A paperclip icon 📄 indicates that an addendum has been added the note, which can be reviewed in the History workspace.
**Viewing a Contact Record’s Related Notes**

If you are searching for the related notes to a contact record (for example, looking for an appointment note that was added to an appointment record), AdRx allows users to quickly locate this information by only displaying those related records.

1. In the *Advising History* section, click **Related Notes** in the row of the contact record.

![Related Notes in AdRx](image)

The section now displays only those related records. Looking at the below example, we see the selected record had two related notes, the appointment record and an update to the appointment.

![Related Notes example](image)

Again, clicking on one of the related notes opens a window with detailed information about the contact record.

2. To display all records once again, click **All Notes** towards the upper left section of *Advising History*. 

![All Notes in AdRx](image)
History Workspace

The student’s History workspace allows you to 1) view all AdRx advising contacts for the student, 2) add a document, and 3) create an addendum to an existing contact record.

Accessing the History Workspace

1. Click History at the top of the page.

All advising notes for this student are expanded and displayed in a scrollable page. For information on the lock or paperclip icons that may be displayed with an advising note, see page 9 of this guide.

- To remove the extra white space from long notes, click Compress Text.
- To restore the white space, click Expand Text.
- To collapse all the notes, click Collapse All.
- To expand all the notes, click Expand All.
Adding Documents to a Student’s Record in AdRx

1. In the History workspace, click Add New Document to attach a document (via Onbase) to the advising note. Note that not all AdRx users will have access to this functionality.

2. Double-click on one of the AdRx – Document Upload Form lines.

The AdRx – Document Upload Form is displayed.

3. Enter the student’s University ID and press Tab. This will auto-fill the student’s name for validation/verification.

4. Select the Campus.

5. Enter the Program, if desired.

6. Enter a Description based on the suggested text provided.

7. Select a Document Type from the drop-down list. “ADV” is for Advising documents and “CAR” is for Career Services documents.

8. If you would like to add more than one document in one transaction, click on the red line and more drop-down entries will be exposed.

9. Click on the button to attach the appropriate document and you will be prompted to find the document from a location, a familiar process that is used in other systems (such as email).
10. Enter your personal **username** and press **Tab** to display/enable the final submit button.

11. Click **Submit**.

12. A confirmation message will appear after the upload is complete. To confirm that the document saved properly, click on **View Documents** in the **History** workspace.

13. To view an existing uploaded document, click **View Documents**.

14. A window will pop up with any viewable documents in the student’s record. Double-click on the document that you wish to view and it will be displayed below the list.

15. For optimal viewing, you may want to maximize the window to full view in the upper right hand corner.

16. To close out of this window, simply click on the red X in the upper right corner of the page.
Adding an Addendum (Threaded Notes)

The AdRx application allows addenda to be placed on previously submitted advising notes. Addenda can only be created and viewed through the History workspace, not in the Information workspace. Also, it is not possible to add an addendum to an addendum.

1. To add an addendum to an advising note, in the History workspace click **New addendum** underneath the desired advising note.

2. Select the appropriate note type (see page 5 of this document for more information on Note types), add your addendum comments, and click **Submit**.

The addendum is displayed under its advising note.
Once an addendum has been submitted, it cannot be deleted. If a mistake was made, add a new addendum correcting the error.

If the addendum was accidentally submitted for the wrong student, it can be inactivated. The user or administrator should click on Report a problem or make a suggestion about AdRx in the bottom left of the page. This will initiate an email to IU-UITS-AA. Explain the situation in your email and they will inactivate the addendum for you. Include in the message the student’s name, ID, and the Contact ID number.

Draft Notes and Addenda

To return to your saved draft note or addendum, click Draft Contact Notes and select the desired draft under My Action List.

Appointment note drafts are also located in the Upcoming Appointments table or in your Appointments page if you are the scheduled advisor.

If you do not save or cancel a note or an addendum within 10 minutes, a draft copy will be saved automatically.

Users can only view and access the drafts that they have saved.