Academic Advising
Advising Records (AdRx) Advising Notes

Overview

After an advising session, an advisor can enter notes in the Advising Notes feature of the AdRx system. You can add Advising Comments that are viewable by the student and Internal Notes that are viewable by advisors and available to students upon request. There is an available enrollment planning feature when adding a new contact record. You may also add an addendum (also termed as Threaded Notes) if you submitted the original AdRx contact.

Steps

Logging into AdRx

1. Navigate to One.IU (one.iu.edu).
2. In the Search bar, 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 and Passphrase when prompted.

The AdRx login page is displayed.
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5. Click [Faculty/Staff Login].

6. Proceed with your method of Duo authentication and click Log in →.

7. From the AdRx main page, click Student Search to find a student’s record. Click here for the Find a Student job aid.

8. Whether there are multiple results returned or just one, click anywhere on the line corresponding to the targeted student to display that student’s information.
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**Adding an Advising Note**

1. To add an Advising Note to the selected student’s record, click **Add New Advising Note**.

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The *Add New Contact Record* page is displayed.
Note: It is important that advisors accurately add **Contact Type** and **Advising Purpose** as these will be used later as filtering options in the Notes Views.

2. Select the appropriate **Contact Type**.

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

5. If you discussed additional topics, 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**.
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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. To add comments you want the student to view at any time, type them under the *Advising Comments* tab.

8. To add notes for internal use viewable by other advisors, click on the *Internal Notes* tab and type the comments. The student will not see these notes when viewing their advising record.

9. *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.
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This Advisor Only Note type is not viewable to the student through the Student Center. This type of note is different than 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.

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

10. To add an Enrollment Plan to the Advising Note, click the Create Enrollment Plan link.

11. Either select an existing stack from the choices given or click Choose a different stack and select the appropriate options from the drop-down lists under the Academic Information Advised For section.
12. After selecting or adding the Academic Information, click the **Add Term** link.

13. Enter the **Institution**, **Career** and **Term** fields.

14. Click **Apply**.

15. Click the **Add Course to Term** link.

16. 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, 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.

17. Click **Apply**.
18. To add another course, click the **Add Course to Term** link.
19. To remove a course from your list, click **Remove**.
20. If you added a course note and would like to edit it before submitting the enrollment plan, click **Edit Course Note**.
21. 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**.
22. To save a draft of your Advising Record, click **Save Draft**. (See page 19 of this document for more information on retrieving saved drafts.)
23. To delete the draft copy, click [Delete Draft].

24. When your Advising Notes are complete and ready for submission, click [Submit].

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 advisor or administrator should click on the Report a problem or make a suggestion about AdRx link in the bottom left of the page. This will initiate an email to IU-UIITS-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 then use the Report a problem link to request the wrong one be inactivated.
Viewing Existing Advising Notes

When you open a student’s Advising Record, the Advising Notes section will automatically be expanded.

1. Click on the desired note to open it.

Understanding Lock Indicators

Advising Contacts may not have detailed notes within them; for example, when the contact is simply a record of an appointment that had no detailed notes. This has sometimes been misleading to AdRx users when clicking on a note and finding no notes. In addition, some contacts may not viewable because the user does not have the same role security. There are two indicators that alert you that one of these scenarios is in play.

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.
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If you click on a contact that doesn’t have a note, the result will look like this.

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.
History Workspace

1. To view all the notes for a selected student, click the History workspace.

![History Workspace Image]

2. All Advising Notes for this student will open.

![Notes Workspace Image]

3. To remove the extra white space from long notes, click **Compress Text**.

4. To restore the white space, click **Expand Text**.

5. To collapse all the notes, click **Collapse All**.

6. To expand all the notes, click **Expand All**.
Adding and Viewing Documents to a Student’s Record in AdRx

1. In the History workspace, click 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 (copy and paste does not work) 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**.

**AdRx–Document Upload Form**

- **University ID**
  - imastudent
- **Last Name**
  - Student
- **First Name**
  - Ima
- **Middle Name**
- **Campus**
  - IU/INA
- **Program**
- **Description**
  - (ex. PROBATION: COAS/Fall 2015/new requirements (or) PETITION: CLAS/degree exceptions)
  - Fall 2015 information
- **Attachment 1 Document Type**
  - AdRx–ADV–UGRD

**Click Here to Attach Multiple Document Types**

- **Attachment 2 Document Type**
- **Attachment 3 Document Type**
- **Attachment 4 Document Type**

- **AdRx–ADV–UGRD**
  - Attach AdRx–ADV–UGRD...

- **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 for addenda to be placed on previously submitted Advising Notes.

- Addenda can only be created and viewed through the History workspace, not in the regular contact notes.
- It is not possible to add an addendum to an addendum.

1. To add an addendum to an Advising Note, click underneath the desired Advising Note.

The note expands with an area to add the new addendum.
2. Select the appropriate **Note** type (see page 7 of this document for more information on Note types), add your addendum comments, and click **Submit**.

The Advising Note addendum is now displayed.
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 advisor or administrator should click on the Report a problem or make a suggestion about AdRx link in the bottom left of the page. This will initiate an email to IU-UIITS-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.

3. To return to the previous view, click Information on the top of the page.

Unsubmitted Contacts/Notes and Draft Addendums

If you do not submit, save a draft, or cancel the Add New Contact Record within 10 minutes, a draft copy will be saved automatically.

If a draft is saved, click on the AdRx logo to return to the Home page where you can click on the unsubmitted contact/note or addendum and continue.

If a draft is saved and you exit AdRx without submitting the Advising Note or the addendum, when you log in the next time you will see a list of your unsubmitted contacts/notes and addendums.

To continue with the student record you saved as a draft, click on any of the line items for that row. You can now submit, save or delete a draft, or cancel and return later.