Academic Advising
Advising Records (AdRx) Planner Review

Overview
When a Planner Review has been submitted by a student, the academic advisor will see it listed in the Action List upon entering AdRx. This job aid is for Academic Advisors.

Steps
1. To reply to the Planner Review and remove it from the Action List, click.

2. If you would like to view the Planner Review quickly, but not yet remove it from the Action List, click the student’s ID or name. This will open the Student Information Workspace. The Planner Review may be opened and comments may be made to it, but it will remain on the Action List. This allows the academic advisor to view and/or make a quick note, but to also leave it as an “open” action to be taken at a later time in case more notes are necessary.
3. If the Planner Review is clicked, it will open the SIS Planner Review Screen and you will see the alert that there is a new note submitted by the student for review. This alert that there is a new note will remain until the Planner Review is cleared from your Action List, even if you as the academic advisor add a note.
4. When you are prepared to comment on the Planner Review and remove it from the Action List, click the envelope icon as seen in an earlier screenshot. This will open directly into the Planner Review screen (as opposed to opening into the Student Information Workspace). You may then enter, post, and/or close the review for future commenting.
5. Once this path has been taken, the new comment alert will change to zero.

6. The student’s Advising History is sorted reverse chronologically. The date and time stamp shows a note was entered and when a Planner Review was last edited. Notice in the example below that Planner Review - 7 is now at the top of the Advising History, compared to being third in an earlier screenshot. This is because it has been more recently edited.