

GradesFirst Training

How to File an Advising Report

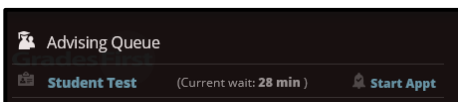
From the Advising Queue

1. Once the student has checked-in at the front desk, he/she will appear in your **Advising Queue**. When you file an advising report we recommend that you have two browser windows or tabs open with GradesFirst loaded in each. One of these windows will be used only for filing advising reports, and the other will be used to view student information in GradesFirst.

2.



3. Check the student in by clicking **Start Appt** in the Advising Queue. This will open the Advising Report and *Time Arrived* will be recorded automatically in the report.



Follow Best Practice

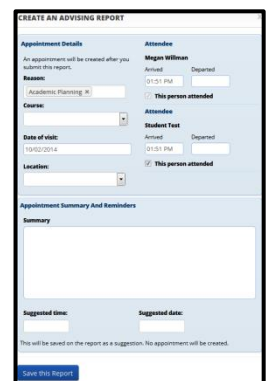
When you use this method, you don't need to enter time arrived or departed.

Advisor Time (arrived and departed) will reflect the scheduled appointment time.

Student Time (arrived and departed) will reflect the actual time spent with the student.

Actual appointment time includes not only the time spent with the student but also the time spent preparing and the time spent entering the notes into the report.

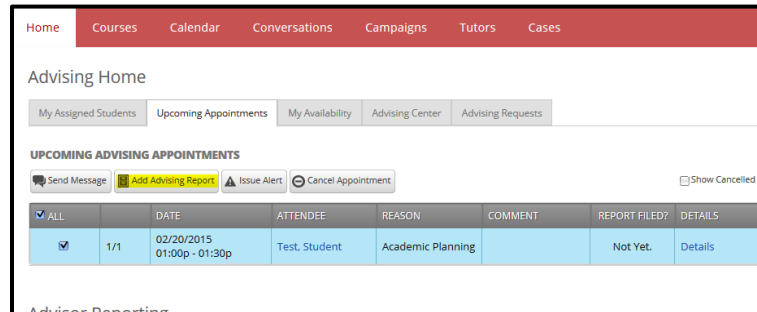
4. File the Advising Report.
 - a. **Arrival Time** is recorded automatically when you click the *Start Appointment* button.
 - b. The **Reason** for the appointment will match the reason provided through the campaign or when the appointment was set. However, you can and should add other reasons if the course of the conversation dictates it. See the [guidelines](#) and [video](#) for "How to Select Reason Codes" for further information. *This only applies to FP Reason Codes (for now)
 - c. Enter your notes for the appointment in the Summary section. If this is a Missed Milestones appointment, you may need to enter additional information. The Reason Codes [definitions](#) and [cheat sheet](#) will help you provide greater detail. Save the report when you are finished.
 - d. Once you save the report, the student will be checked out of the appointment and the



Departure Time will be logged. Again, you do not need to enter any time data into the report. It will enter automatically.

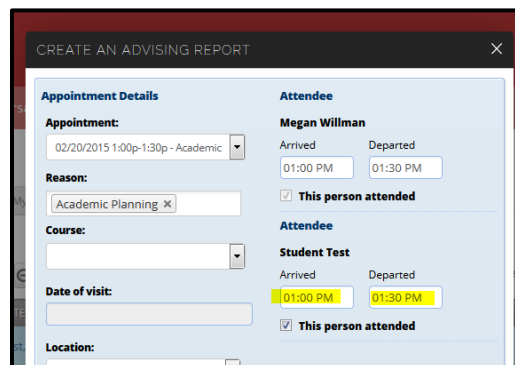
From the Home screen/Upcoming Appointments

1. If you do not have front-desk staff, you can begin your appointments from your home screen. Select the **Upcoming Appointments** tab. Click in the box next to the appropriate appointment and select **Add Advising Report**.



The screenshot shows the 'Advising Home' interface with the 'Upcoming Appointments' tab selected. Below the navigation tabs, there is a section titled 'UPCOMING ADVISING APPOINTMENTS'. It includes buttons for 'Send Message', 'Add Advising Report' (highlighted in yellow), 'Issue Alert', and 'Cancel Appointment'. A table lists upcoming appointments with columns for 'ALL', 'DATE', 'ATTENDEE', 'REASON', 'COMMENT', 'REPORT FILED?', and 'DETAILS'. The first appointment is for '1/1' on '02/20/2015' from '01:00p - 01:30p' with the attendee 'Test, Student' and reason 'Academic Planning'. The 'REPORT FILED?' status is 'Not Yet.' and a 'Details' link is provided.

2. When the **Advising Report** opens, you will see that the time has already populated in both sections, and it reflects the scheduled appointment time. Because this student didn't enter through the front-desk mode, you will need to enter the actual time spent with the student. Leave the scheduled time (the first set of arrived and departed times) as-is; this is the scheduled appointment time. You will change the time in the second time block (highlighted below). Record the arrived time to indicate the time the appointment begins, and the departed time reflects the end of the appointment (including the time that you spend entering your notes.)



The screenshot shows the 'CREATE AN ADVISING REPORT' form. It is divided into two main sections: 'Appointment Details' and 'Attendee'. Under 'Appointment Details', there are fields for 'Appointment:', 'Reason:', 'Course:', 'Date of visit:', and 'Location:'. The 'Appointment:' field is set to '02/20/2015 1:00p-1:30p - Academic'. The 'Reason:' field is set to 'Academic Planning'. Under the 'Attendee' section, there are two sub-sections: 'Attendee' and 'Student Test'. The 'Attendee' sub-section is for 'Megan Willman' and shows 'Arrived' and 'Departed' times of '01:00 PM' and '01:30 PM' respectively. The 'Student Test' sub-section shows 'Arrived' and 'Departed' times of '01:00 PM' and '01:30 PM' respectively, with the '01:00 PM' time highlighted in yellow. Both sub-sections have a checkbox for 'This person attended' which is checked.