



Where Do I...?

Making Contact

- See a list of all currently enrolled advisees
- Identify students to proactively contact (for targeted campaigns)
- Create lists of students
- Email individuals or groups of students
- Track outreach and responses
- Schedule student appointments

Getting Up to Speed On a Student
(The Student Snapshot)

- View general student information (e.g., contact information, age, student ID, name, year)
- Check a student’s academic standing
- Perform a degree audit and check a student’s coursework against graduation requirements
- Review a student’s predicted risk
- Review a student’s institutional academic record (e.g., coursework, grades, GPA)
- See if a student is completing critical courses on time
- Review a student’s academic trends (e.g., GPA, credit accumulation)
- Review a student’s pre-college academic record, including AP/IB, transfer status and coursework, test scores, and high school GPA
- Review “early alert” data (e.g., attendance, LMS usage, faculty-reported issues)
- Review previous advisor-student interactions and notes
- Identify any holds on a student’s account

Tracking Advising Interactions

- Log interactions with advisees
- Create and manage advising notes
- Send communications to and about students
- Set reminders for future interactions with students or follow-up activities
- Manage student documents

Advising Technology Workflows at
the University of X

Advising Conversations and Activities

Helping Struggling Students

- Connect students to academic and non-academic support resources, make referrals
- Review student financial data (e.g., aid amount, aid type, work-study participation, on-campus employment)
- Calculate a student’s GPA or “what if” GPA for future coursework

Course Selection

- Review recommended courses based on degree requirements
- Review recommended courses based on degree milestones/success markers
- Review recommended courses based on predicted difficulty
- Review course and seat availability
- Check for completion of prerequisite coursework
- Create a potential course schedule

Degree Auditing and Multi-Year Academic Planning

- Review graduation requirements
- Audit completed coursework for satisfaction of degree requirements
- Create a four-year academic plan

Registration

- Obtain student registration PINs, authorize registration, place or remove student holds, approve student schedule, etc.

Major Declaration or Reconsideration

- Review a student’s current major and previous major changes
- Review potential major admissions and graduation criteria
- Explore alignment of potential majors with student skills aptitude
- Explore the impact of potential majors on degree progress through a “what if” degree audit
- Explore career information for majors of interest