

# Advisor Reference Manual For ACSAS

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**Algonquin College Student Advising System**

*An online tracking and recording tool for Advisors*

Updated January, 2012

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## 1 Overview

Welcome to the Algonquin College Student Advising System. This online application has been developed to support Academic Advisors in the tasks of documenting and tracking advising appointments with students.

The term “advisor” is used in this document to refer to all those using the system regardless of role. Educators in the following roles are considered “advisors” for the purpose of ACSAS:

Coordinator (for Program or for a specific year in Program)

Faculty Advisors (assigned by the Chair to advise students at a specific program level)

Student Success Specialist (for School or Faculty)

This document is a guide for those members of advising teams registered on ACSAS. It provides descriptions of features and instructions for processes that are needed to track and record advising sessions with students. To protect the confidentiality of student data, access to the system is restricted to those advisors assigned to the system by Chairs or Academic Managers.

ACSAS has been developed by ITS in collaboration with members of the Academic Advising Steering Committee. Users are asked to provide feedback on the system and this manual so that improvements can be made for the next implementation. Please send feedback to Marni Squire, Coordinator, Academic Advising, at [squirem@algonquincollege.com](mailto:squirem@algonquincollege.com).

## 2 Logging In and the Advisor Home Page

A link to the login page for ACSAS is available on the home page of the Academic Advising website <http://www.algonquincollege.com/acadvising/>

### 2.1 Login

1. **LAUNCH** Internet Explorer or Mozilla Firefox. Please note that this application does NOT work with Google Chrome.
2. **LOGIN** at <http://intraweb.ottawa.ad.algonquincollege.com/apps/studenttracking/>

**Username**     *Enter your Algonquin College username. Same used for Algonquin email.  
e.g., squirem*

**Password**     *Enter your Algonquin College password. Same used to access Algonquin email.*

Note: You must be registered on the system by the System Supervisor before using it. Each term the Chair of each program provides the names of Academic Advisors. If the system does not recognize your username and/or password, the following message will appear:

*“Logon failure. Unknown username or bad password.”*

Should this happen, please contact Marni Squire.

### 2.2 Advisor Home Page

From the *Advisor Home Page*, advisors can use the application menu to do three basic tasks:

**Select Student(s)** – prepare to record the results of an advising session by selecting a single student or multiple students. If this is your first session on ACSAS you will not be able to use the multiple student feature until you create a student list. See **Create a Student Group List** in section 6 below.

**Manage Student Lists** – create, modify, delete or copy student lists so that the multiple student feature can be used.

**Create Reports** – prepare reports with information about students who have received Comments, Agreed Actions and Referrals within the advisor’s program. The reports are optional and are for the use of the advisor.

From the *Advisor Home Page*, advisors can access three kinds of information:

**Week of Term** – the system will display the current week of term, e.g. week 13 of 15. Between terms, the system will indicate how many days remain to the start of term. The winter break week is not included as an active week.

**Memory Joggers and Upcoming Events** – important calendar dates for advisors and notices of upcoming PD or other College events of interest to either advisors or their advisees are provided.

**Agreed Action Reminders** – If the advisor has requested that the system send a reminder about an agreed action with a student, the following information appears on the home page on the date set by the advisor: student's first and last name, text of the agreed action, the reminder date, and the date that the record was last updated. See section 4.2 of this manual for more details.

### 3 Students and Group Lists

#### 3.1 Select a Single Student

An advisor can:

- make a comment
- record an agreed action
- record a referral and/or
- write a memo about a single student

Before doing so, the advisor must select the correct student.

Note: It is only possible to record information about a student during the current term.

To select a single student:

1. From the *Advisor Home Page* **CLICK** "one" from the line "To begin using the system, please select one or multiple students."
2. **Select Term** *The current term should appear by default.*  
**Select Program** *If necessary, choose the program in which the student is registered.*  
**Select Level** *Choose the level in which the student is registered. If you do not know the level, choose ALL.*
3. Find a student by typing in the student's name (Option A) or selecting the student's name from the table of students listed (Option B).

##### **Option A**

1. **ENTER** the student's name in the *First Name* field and/or the *Last Name* field respectively.
2. **CLICK** *Search* to generate a table of students with the name or partial name as typed.
3. **CLICK** Select beside the student's name.

Note: In rare cases of identical student names, it may be necessary to verify the student's name against the student's ID number.

##### **Option B**

1. Locate the student from the table of students in the program. Students are listed alphabetically by last name in groups of ten.

2. **CLICK** on the page number at the bottom of the table to move from one group of ten names to the next, (e.g. 1, 2, 3, etc).
3. **CLICK** *Select* beside the student's name.

### 3.2 Create a Student Group List

Each advisor has the ability to create student lists that can remain visible to the advisor only (private) or that can be shared with other advisors assigned to the same level and program (public). The advisor can make a comment, referral, agreed action or memo for all students on the list at one time.

To create a Student Group List:

1. **GO TO** *Manage Student Lists* on the application menu, **CLICK** on *Create List*.
2. **HIGHLIGHT** the specific program from the drop-down menu in the *Program* field if you are advising in more than one program.
3. **TYPE** a descriptive name for your Student Group List in the *Name* field. If you are planning to share the list with other advisors, it is preferable to include your own name in the descriptive name; e.g. "Marni Squire's Students at Risk"
4. Choose an option to make your list visible to other Advisors in the **Visibility** drop-down list. Select **Private** for your list to be visible only to you or **Public** for your list to be visible to you and all advisors assigned to the same level and program.
5. In the *Students* box, **CLICK** next to each student to be added to the Student Group List.

Note: Above the box next to *Students* the total number selected will be noted e.g., "3 selected of 75"

6. **CLICK** *Create List*.
7. A confirmation will appear: **New list "Name" successfully created.**

### 3.3 View / Modify a Student Group List

To view a list:

1. From the **Advisor Home Page** select "**multiple**" from the line "To begin using the system, please select one or multiple students." The **Select Multiple Students** page will appear.
2. **HIGHLIGHT** the specific program from the drop-down menu in the *Program* field if you are advising in more than one program.

3. **HIGHLIGHT** the Student Group List you want to view from the *Student List* drop-down menu. The students will be listed alphabetically by last name as follows: First Name, Last Name, (Student ID #).

Note: From this point, you may modify the list or select the list so that information can be entered concerning the students on the list.

To modify a list:

1. From the *Advisor Home Page* select “multiple” from the line “To begin using the system, please select one or multiple students.” The Select Multiple Students page will appear.
2. **HIGHLIGHT** the specific program from the drop-down menu in the *Program* field if you are advising in more than one program.
3. **HIGHLIGHT** the Student Group List you want to view from the *Student List* drop-down menu. The students will be listed alphabetically by last name as follows: First Name, Last Name, (Student ID #).
4. **GO TO** *Manage Student Lists* on the application menu, **CLICK** on *View/Modify List*. The View/Modify Student List page will appear.

Note: You may modify one or more of the following: Name, Visibility, Students.

5. **TYPE** the revision in the *New Name* field to modify a name.
6. **CHOOSE** the revised option from the drop-down menu in the *Visibility* field to modify the Visibility.
7. To modify the students on the student list, use the checklist box.  
  
**CLICK** the checkmark beside a student who is to be removed from the list.  
  
**CLICK** the box beside a student who is to be added to the list.
8. **CLICK** *Modify List* to save your changes.
9. A confirmation will appear: “**List ‘Name’ successfully modified.**”

Note: From this point, you may modify the list or select the list so that information can be entered concerning the students on the list.

Note: You can add and/or remove students from a list that you have created, but any comments, referrals, agreed actions and memos that have already been made and saved about each student on the list will remain on the system.

### 3.4 Delete a Student Group List

An advisor may create a student group list for a single purpose and then delete the group list after that purpose has been served. For example, a list of 20 advisees may be subdivided into 4 groups of 5 advisees each for orientation. The list can then be deleted.

Note: comments, referrals and agreed actions made for students within a group will remain on the system under each individual student's name even if the group list has been deleted.

An advisor may also want to delete a group list if a mistake was made in creating the list in the first place.

To delete a student group list:

1. From the *Advisor Home Page* select "**multiple**" from the line "To begin using the system, please select one or multiple students." The Select Multiple Students page will appear.
2. From the *Advisor Home Page*, point to **Manage Student Lists**. Click on **Delete list**. The Delete Student List page will appear.
3. **SELECT** the correct program from the drop-down menu in the *Program* field if you are responsible for advising in more than one program.
4. **SELECT** the name of the group you want to delete in the *Name* drop-down list.
5. **CLICK** *Delete List*. A query box will appear with the message, "Are you sure you want to delete student list 'Name'"?
6. **CLICK** OK. A new note "**List 'Name' successfully deleted**" will appear. At this point, you can logout, or choose another option from the application menu, or click Ok to be returned to the Delete Student List page.

### 3.5 Copy a Student Group List

An advisor can copy a student group list that he or she has created privately or publicly and give it another name. An advisor can also copy a group list that has been created by someone else but is available publicly within the program. For example, a program coordinator may create a public list for the program that groups together all students with international status. An individual advisor can then copy the list, give it a new name (Jane's International advisees\_F11), and modify the list so that only those students she is advising are included.

To copy a student list, perform the following steps:

1. From the *Advisor Home Page*, point to **Manage Student Lists**. **CLICK** *Copy list*. The Copy Student List page will appear.

2. **SELECT** the correct program from the drop-down menu in the *Program* field if you are responsible for advising in more than one program,
3. **SELECT** the name of the group you want to copy in the *Copy from List Name* drop-down list.
4. **TYPE** the new name of the list in the *Copy to New List Name* field.
5. **CLICK** *Copy List*. A new message will appear, “**List ‘original name’ successfully copied to new list ‘new name’**”. At this point, you can logout, or choose another option from the application menu, or click Ok to be returned to the Copy Student List page.

Note: To view the newly named list, point to **Select Student** on the application menu, then click on **multiple students**. Choose the group by its new name in the drop-down Student List field. From this point, you can modify the list by pointing to **Manage Student Lists** in the application menu, then clicking **View/modify list**.

### 3.6 Select Multiple Students

Advisors can:

- make comments
- record agreed actions
- record referrals and
- write memos that refer to more than one student at a time.

Advisors may choose to meet with a small group of students for reasons including

- Orientation
- Exam preparation
- Touching base before midterms

Advisors may meet with a few students on an individual basis, but choose to make a record for the students as a group because the same issue was addressed for each.

In addition, student groups may be created so that all members of the advising team can track students with something in common:

- Students at risk
- Students preparing for placement
- International students
- Students referred to Academic Coaching
- Mature students

→ See Create a Student Group List in section 3.2.

Note: It is only possible to record information about a student during the current term.

To select multiple students:

1. From the *Advisor Home Page* **CLICK** "multiple" from the line "To begin using the system, please select one or multiple students."
2. **Select Term** *The current term should appear by default.*  
**Select Program** *Choose the program in which the student is registered.*
3. **SELECT** the relevant Student Group List in the *Student List* drop-down menu.
4. **CLICK** *Select List*.

## 4 Logging Sessions

### 4.1 Add Discussion / Comments

From the **Add Discussion/Comments Page**, the Advisor can enter information that describes the results of an advising session:

- Select the topics discussed (required)
- Enter additional comments (optional)
- Select the date of the advising session (as required)
- Save the information (required)

To log a session:

1. **SCROLL** down the list of available discussion topics to familiarize yourself with the options.

Note: The ten topics have been chosen as those most often selected by advisors in the past two years. They are listed in order of frequency chosen; in other words, the first item, “touching base,” was the topic most often checked by last year’s advisors; the second item, “academic performance,” was the second most commonly checked topic, etc.

2. **CLICK** the box beside any topic that was discussed in some depth in the advising session. You may choose more than one topic per session.
3. **ENTER** any additional comments (optional). The purpose of this section is to allow you to record any information that will help you remember the student’s situation in later advising sessions. Your comments will also be visible to other advisors sharing responsibility for advising this student.

→ For guidance on writing comments, see Appendix A, sections 6 and 7 on page 23.

4. If you are logging a session on the same date as the meeting, ensure that **NOW** is selected. The **NOW** button is the default setting.
5. If you are logging a session on a later date than the meeting, **CLICK *Specify***, and **CLICK** the calendar icon to specify a date.

Note: **CLICK** black arrows on either side of the month to change.

6. **CLICK *Save*** to complete entry.
  - If you have entered a comment, a confirmation will appear “**New student discussion/comment saved.**”

- If you have NOT entered a comment and want to continue without one, at the window “**Save this discussion without comments?**” **CLICK** *Ok*. The confirmation “**New student/discussion comment saved**” will appear.
- If you have NOT entered a comment and want to add one, at the window “**Save this discussion without comments?**” **CLICK** *Cancel* and add your comments, then **CLICK** *Save* again to complete the entry and the confirmation “**New student/discussion comment saved**” will appear.

At this point, you can logout, choose another option from the application menu, or click *Ok* to enter the Modify Discussion/Comment page of the logged session.

## 4.2 Add Agreed Actions / Referrals

From the Add Agreed Actions / Referrals page, the advisor can create a message to send to a student that summarizes the details of any mutually agreed-upon decision resulting from the advising session.

*E.g., Hi Carl – At our advising meeting today, you agreed to prepare a weekly schedule that includes all courses, labs, study time, work hours and free time by Wednesday September 15<sup>th</sup>. You also agreed to meet with me again on September 15<sup>th</sup> at 3:15 PM in T338 to discuss time management using this tool. Looking forward to working with you again, [Advisor’s name].*

**The message is sent to the student’s Algonquin email address as soon as it is saved.** The advisor can indicate that he/she wants to be reminded to follow up on the agreed action by specifying a reminder date. When the reminder date is reached, the advisor receives an email reminder for the agreed action and also sees a reminder on the Home Page.

On this page, the advisor can make a record of any referral(s) to other people or services at the College.

Agreed Action records, Agreed Action Reminders, and Referral records are optional.

To add an Agreed Action:

1. **SELECT** one or multiple students from the Advisor Home Page. The Add Discussions/Comments Page will appear.
2. Point to *Add Student Information* on the application menu, then **CLICK** Agreed Actions/Referrals. The **Add Agreed Actions / Referrals Page** will appear.

To send a message to a student about the details of an agreement with the student:

1. **ENTER** a message summarizing the details of the agreement you reached with the student during the advising session in the Agreed on Actions text box.

→ This message is sent to the student's Algonquin email address as soon as the SAVE button is clicked. It is recommended that the text be written as if it were an email to the student, including a greeting that includes the student's name, and a closure that includes your own name. The system supplies the Subject Line for the email when it is sent: *Student Advising System - Record of Agreed Action*.

You can save the Agreed Action immediately, or add an **Agreed Action Reminder** to yourself (see step 4) and/or add a Referral (see step 6).

2. To save the text without adding an Agreed Action Reminder or a Referral, go to the bottom of the page and **CLICK Save**. As soon as the Save button is clicked, an email message containing the contents of the Agreed Action text box is sent to the student.

To send a reminder to yourself about the agreed action:

1. **CLICK** the Agreed Action Reminder box.
2. Specify the date on which you want to be reminded of the agreed action using the calendar provided. **CLICK** the calendar icon and select a date that is at least one day later than the current date. An Agreed Action Reminder will be sent to your email address on the date specified. In addition, you will see a reminder about the agreed action posted on your ACSAS Home Page.

To record a referral:

1. **GO TO** the **Referrals** checklist box. Referrals are listed in alphabetical order.
2. **SELECT** referrals by placing a check-mark beside each personnel and/or departmental referral you have made to the student.

Note: The system records the information for the advisor but does not send this information to the student. To ensure the student has the correct information, it is suggested that the advisor write down the referral for the student or cut and paste the information from the system into the Agreed Action text box as part of the message. The person or department to whom the student is referred is NOT informed automatically about the referral. It is up to the student to follow through on the advice.

3. **CLICK Save**. A new message "**New student agreed actions/referrals saved**" appears. At this point, you can logout, or choose another option from the application menu, or click **Ok** to be returned to the Add Agreed Actions / Referrals page.

### 4.3 Add Advisor Memo

Advisors may use the system to record information about a student that does not result from an advising session. For example, advisors may enter data obtained from at-risk reports, or make a note to indicate that a student has international status. Memos can also be used to record unsuccessful

attempts to reach a student; these comments can be useful in evaluation and promotion meetings later in term.

To add an Advisor Memo, perform the following steps:

1. From the *Advisor Home Page*, select one or multiple students as described in sections 5 and 10. The Add Discussions/Comments page will appear.
2. Point to **Add Student Information** on the application menu, then **CLICK** *Advisor Memo*. The Add Advisor Memo page will appear.
3. **TYPE** the information in the *Memo* textbox. You may develop your own shorthand to make memos; e.g. "AR math" to indicate a student who has received less than 68% in a high school grade 12 math course and is considered potentially at risk in this area; "no show 15 Sept." to indicate a student who did not attend a pre-arranged advising session, etc.
4. **CLICK SAVE MEMO**. A new message "**New advisor memo added**" will appear. At this point you can logout, or choose another option from the application menu, or click Ok to be returned to the Add Advisor Memo page.

#### 4.4 Select Program

Most advisors are responsible for advising students in a single program. In this case, the program in which they are advising will be the only program in the *Select Program* field. In other cases, and especially in the case of Student Success Specialists, the advisor may be responsible for students in more than one program. In these cases, the advisor can select a program from the drop-down list. Only the programs for which the advisor is responsible will be available for selection.

#### 4.5 Select Level

Most advisors will be responsible for advising a group of students in level one or two of a program; however, in some programs, students at higher levels receive advising as well. ACSAS, therefore, contains the names of all students in all levels in an active program. The advisor must select the level for which he or she is responsible.

Note: "Level" does not refer to "Year." In most programs, students complete levels 1 and 2 in the first year, and levels 3 and 4 in the second. If you do not know which level you are responsible for advising, please consult with your program coordinator.

To select a level:

1. **SELECT** the level of the students you are advising In the *Select Level* drop-down menu.
2. **SELECT** *All* if you want to see the names of all students in the program. Select "**1,**" or "**2,**" etc. to reduce the list to those students in a single level.

## 4.6 Select Advised (Already advised / Not yet advised)

By default, ACSAS displays the names of all students at the selected level(s). Advisors can also choose to view the names of students based on their advisee status; that is, those who have already been advised or conversely, those who have not yet been advised. .

Note: “YES” refers to a list of all students for whom an advising record has been made. “NO” refers to a list of all students for whom an advising record has NOT been made.

To select the names of students based on their advisee status:

1. **SELECT** “YES” or “NO” in the *Select Advised* drop-down menu.

## 4.7 View/Modify Discussion Topics and Comments

Advisors can look back on previous comments and discussion topics recorded for a particular student or group of students. This feature is available for all those on the approved advising team for a particular level and term; in other words, an advisor can see his or her own comments as well as those made by other advisors working with the same group of students.

→ Access to the system is limited. For more details, please see the **Four Principles of the Student Advising System**, Appendix A, page 22.

Advisors can also modify and delete discussion topics and comments. Any modifications and deletions can only be made by the person who made the original record, and the action can only be taken during the active term. No changes can be made to the system after the last day of term.

To view previously made Discussion Topics and Comments, perform the following steps:

1. From the *Advisor Home Page*, select the one or multiple students for whom you would like to view or modify information. The Add Discussions/Comments page will appear.
2. Point to *View / Modify Student Information* on the application menu, then **CLICK** *Discussion / Comments*. The View/ Modify Discussion/Comments page will appear.
3. **SCROLL** to the comment of interest. Comments appear in ascending chronological order based on the original date of recording.

Note: each record includes the recording advisor’s name, the date and time of the record, the date the record was last updated, the term, and the topic or topics discussed. If no comment had been entered, the text box appears empty.

To modify a comment, perform the following steps:

1. **PERFORM** steps 1 through 3 above.

2. **CLICK** *Modify Comment* and enter your revisions. You may check an unchecked topic box and/or uncheck a previously checked box. You may also delete, revise and enter text in the comments textbox.
3. **CLICK** *Save*. A new comment “Student discussion/comments updated” will appear. At this point, you can logout, or choose another option from the application menu, or click Ok to be returned to the *Modify Discussion / Comments* page.

Note: You can modify only those comments you have made yourself during the term that you originally made them.

To delete a comment, perform the following steps:

1. **PERFORM** steps 1 through 3 in the section “To view previously made discussion topics and comments” above.
2. **CLICK** *Delete Comment*. A dialogue box will appear “Are you sure you want to delete this comment?” If you click **OK**, you will be returned to the *Modify Discussion / Comments* page and the comment will have been removed. If you click **Cancel**, you will be returned to the *Modify Discussion / Comments* page, and the comment will remain.

Note: You can delete only those comments that you have made yourself during the term that you originally made them.

## 4.8 View Referrals

Advisors can review the referrals that have been made for a particular student or group of students. This feature allows all advisors on the team for that program level and term to view all referrals. No modifications or deletions can be made on this page.

To view Referrals, perform the following steps:

1. **SELECT** the one or multiple students for whom you would like to view previously made referrals. The *Add Discussion / Comments* page will appear.
2. Point to *View / Modify Student Information* on the application menu, **CLICK** *Referrals*. The *View / Modify Referrals* page will load. All referrals appear in descending chronological order.

Note: there is no “modify” feature for this page.

## 4.9 View /Modify Agreed Actions

Advisors can review the agreed actions that have been made for a particular student or group of students. Modifications or deletions can be made on this page.

To view Agreed Actions, perform the following steps:

1. **SELECT** the one or multiple students for whom you would like to view previously made agreed actions. The Add Discussion / Comments Page will appear.
2. Point to *View / Modify Student Information* on the application menu, **CLICK** *Agreed Actions*. The View/Modify Agreed Actions page will appear. All Agreed Actions appear in descending chronological order.

To modify an agreed action, perform the following steps:

1. **CLICK** on the *Modify Agreed Action* button and enter your revisions. You may delete, revise and enter new text in the  textbox.
2. **CLICK** the *Save* button. A new comment "Student agreed action updated" will appear. The student will be sent an email with the subject line: *Student Advising System - Record of Agreed Action* ; the text of the email will include the modified agreed action. At this point, you can logout, or choose another option from the application menu, or click **Ok** to be returned to the **Modify Agreed Actions** page.

Note: You can modify only those agreed actions that you have made yourself during the term that you originally made them.

To delete an agreed action, perform the following steps:

1. **CLICK** on the *Delete Agreed Action* button. A dialogue box will appear "Are you sure you want to delete this agreed action?" If you click **OK**, you will be returned to the Modify Agreed Actions page and the agreed action will have been removed. If you click **Cancel**, you will be returned to the Modify Agreed Actions page, and the agreed action will remain.

Note: You can delete only those agreed actions that you have made yourself during the term that you originally made them. The agreed action can be deleted from the system, but the target student will still have received the original agreed action in his or her inbox.

## 4.10 View / Modify Advisor Memos

Advisors can review the memos that have been made for a particular student or group of students. Modifications and deletions can be made on this page.

To view Memos, perform the following steps:

1. **SELECT** the one or multiple students for whom you would like to view previously made memos. The Add Discussion / Comments Page will appear.

2. Point to *View / Modify Student Information* on the application menu, **CLICK** *Advisor Memos*. The View/Modify Advisor Memos page will appear. All memos appear in ascending chronological order.

To modify an advisor memo, perform the following steps:

1. **CLICK** on the *Modify Memo* button and enter your revisions. You may delete, revise and enter new text in the textbox.
2. **CLICK** the *Save* button. A new comment “Advisor memo updated” will appear. At this point, you can logout, or choose another option from the application menu, or click **OK** to be returned to the **Modify Memo** page.

Note: You can modify only those memos that you have made yourself during the term that you originally made them.

To delete an advisor memo, perform the following steps:

1. **CLICK** on the *Delete Memo* button. A dialogue box will appear “Are you sure you want to delete this advisor memo?” If you click **OK**, you will be returned to the Modify Memo page and the memo will have been removed. If you click **Cancel**, you will be returned to the Modify memo page, and the memo will remain.

Note: You can delete only those memos that you have made yourself during the term that you originally made them.

## 4.11 Select Term

By default, the **Select Term** field is set to the current term. Advisors who are currently active and who have advised in a previous term are permitted to view information from that previous term. To request access to a previous term’s information, please contact Marni Squire.

Previous terms can be selected from a drop-down menu. Advisors can view, but not modify or delete, information from a previous term.

To select a term, perform the following steps:

1. Point to *Select Students* on the application menu, then **CLICK** *Single Student* or *Multiple Students* as needed for your inquiry. The relevant page will appear.
2. **SELECT** the year and term that you require from the *Select Term* drop-down list,. Note that S stands for summer, F for fall, and W for winter.
3. **SELECT** the relevant program from the *Select Program* drop-down list if you were responsible for more than one program in the selected term/year.

## 5 Reports

### 5.1 Create Reports

Advisors can create, download and print eight different reports:

- Student list by program (filtered by level and registration code as selected by the advisor)
- Students with Agreed Actions by Advisor
- Students with Agreed Actions by Program
- Students with Comments by Advisor
- Students with Comments by Program
- Students with Referrals by Advisor
- Students with Referrals by Program
- Students with Records by Advisor

The same basic steps are performed for all types of reports. One example is included here.

To create a report of Agreed Actions of students by program, perform the following steps:

1. Point to *Reporting* on the application menu, **CLICK** *Students with Agreed Actions by program*. The *Students with Agreed Actions by program* page will appear.
2. **SELECT** the correct program from the drop-down menu in the *Select Program* field if you are responsible for advising in more than one program,

Note: You must select the correct start and end dates before you click the Create Report button.

3. **SPECIFY** a *Start Date* for your report. If the Start Date for your term is not showing by default, **CLICK** *Pick Date*. **SELECT** the month by clicking on the forward or back arrows at the top of the calendar beside the month name. **SELECT** the date by clicking on the correct box for the day.


Note: the dates for the fall term have been set on GeneSIS as September 5, 2011 to December 17, 2011.

4. **SPECIFY** an *End Date* for your report. The end date is normally the day you are creating the report; however, the system considers “today” to end at midnight. It is therefore advisable to choose tomorrow’s date as the end date. You may also choose another date for the end date by using the calendar selection tool as described in step 4.
5. **CLICK** *Create Report* button at the top right of the page. A report will load. Be patient, as it may take a few seconds to get started. You may view the report in this form, but to print or manipulate it, you must download it to your own computer.

## 5.2 Download, Save and Print a Report

Reports can be downloaded using one or more of three programs: Adobe Acrobat, Word, or EXCEL.


To download a document in Adobe Acrobat, perform the following steps:

1. **CLICK** *Export icon*  on the application menu for the Students with Agreed Actions by Program page. **CLICK** *PDF*. A .pdf document will load.

Note: If you do not have Adobe Acrobat Reader, download it at <http://get.adobe.com/reader/>


2. Save the document with a name of your choosing.

To download a document in Microsoft Office Word, perform the following steps:

1. **CLICK** *Export icon*  on the application menu for the Students with Agreed Actions by Program page. **CLICK** *Word*. A Word document will load.

2. **SAVE** the document with a name of your choosing.

To download, save and format a report in EXCEL, perform the following steps:

1. **CLICK** the *Export icon*  on the application menu for the Students with Agreed Actions by Program page. **CLICK** *Excel*. An .xls document will load.

2. **SAVE** the document with a name of your choosing, then open it. You will see a report with descriptive information in rows 1 through 17 followed by a student information table. To create a more usable report in EXCEL, it is suggested that you delete the descriptive information (see step 3).

3. To delete the descriptive information, first select it as follows:

**PLACE** the cursor arrow on the "1" in Row 1, **CLICK** once. **MOVE** the cursor down to row 17. While holding down the Shift key, **PLACE** The cursor over the "17" in Row 17 and **CLICK** once.

You have now selected all text above the table of student information.

**CLICK** *Delete*. You have now deleted all the information in rows 1 through 17.

4. To move the student table to the top of the EXCEL sheet, **HIGHLIGHT** rows 1 through 17 again. **CLICK** *Delete*. The student table headers will form Row 1: Program ID, Student First Name, Student Last Name, Advisor First Name, Advisor Last Name, Created (date). **SAVE** the document.

5. You may now manipulate and sort the data to create your own reports.

## Appendix A: Confidentiality and Disclosure Guidelines

The Algonquin College Student Advising System (ACSAS) is an online recording and tracking system housed within the College's IntraWeb that has been developed in collaboration with ITS for academic advisors at Algonquin College.

### Four Principles of the Student Advising System

1. Staff access to the ACSAS is limited. The ACSAS is accessible only to those staff assigned a role on an approved program advising team. Teams must be part of the Academic Advising Program to use the ACSAS.
2. Advisors can best support a student by sharing advising information among knowledgeable colleagues. It is acceptable for advisors to share information that affects a student's academic progress as long as the information stays within the advising team for the student's program.
3. The information that can be shared among the advising team about a particular student is limited in extent and type. The degree to which a student's information is shared among those on the advising team and the type of information shared must conform to existing College directives with respect to confidentiality and disclosure of student information.
4. Students have the right to be informed about any collection or sharing of academic information. Each student assigned an academic advisor must be made aware of the confidentiality and disclosure guidelines at or before the first meeting with the advisor.

### FAQS

#### 1. Who is included on the "advising team"?

The advising team is defined by each program's Chair each semester and includes

- one or more faculty advisors,
- the Student Success Specialist for the School/Faculty,
- the Coordinator of the program,
- the Chair of the program.

#### 2. Can anyone else see the information on the ACSAS?

The Dean of each program's School or Faculty can be added to the advising team by default; he or she can view, but not add to, the information.

The Academic Advising Coordinator (for the College) is added to the advising team by default; he or she can view, but not add to, the information and can also create reports from the collated system information for the Academic Advising Steering Committee as requested.

**3. Can faculty who are not part of the advising team view information about a student on the ACSAS?**

No, faculty who are not assigned an official advising role cannot log on to the system or view information.

**4. Can a faculty who is assigned an advising role still view the information about the students he or she advised in a previous semester (e.g. in F10) in the next semester (e.g. F11)?**

YES, but only if the faculty's role as advisor has been renewed for the current term within the same program. Advisors who are removed from the advising team can no longer log on to the system or view information.

**6. What kind of information can be shared on the ACSAS about a student among an advising team?**

Information of a **factual** nature that is required to support the **academic success** of the student

- General topic of discussion
- Brief explanatory comments that use neutral, non-judgmental language
- Use of job titles or positions (rather than proper names) of College staff
- At-risk designations or testing scores as agreed upon by the department
- Referrals to other College services (contact information only)
- Agreed actions – brief summary of “next steps” as mutually agreed upon by the student and advisor at an advising session

**7. What kind of information cannot be shared on the ACSAS about a student among the team?**

- Personal details unrelated to academic matters (e.g. details of personal life, particulars that suggest to the advisor that the student should be referred to counselling, CSD or another appropriate student service)
- Proper names of other College staff (with the exception of referrals) especially in the case of student complaints or grievances
- Unsupported or undocumented observations (e.g. “student may be dyslexic”)
- Information that the student specifically requests NOT be shared.

**8. Which policies provide guidance with respect to College rules for confidentiality and disclosure?**

Directive **A21** (Rights, Freedoms, Responsibilities and Code of Conduct for the Algonquin College Community); Directive **AA40** (Academic Advising); Directive **A11** (Freedom of Information) and Directive **E19** (Confidentiality of Student Records).

**9. What does Policy AA40 on Academic Advising say about confidentiality and disclosure?**

The Directive outlines a “code of ethics” written by a Counsellor in Counselling Services at Algonquin (Section 3):

“Code of Ethics. Advisors will...

3. Not disclose information acquired from the student while functioning in an advising capacity, except in those cases where disclosure is
  - *Requested by the student,*
  - *Required to support the academic success of the student,*
  - *Required to avert a clear and imminent danger to the student or others*
  - *Required to protect the integrity of an academic program” (E31, page 3).*

**10. What should the student be told about the ACSAS on or before the first advising session?**

- An academic advisor is not a personal counsellor, a CSD counsellor or a specialized career counsellor. An academic advisor supports your educational progress in a program of study and can also be consulted for field-specific advice.
- Your advisor may make notes about your advising sessions on the ACSAS. You will be asked to sign a consent form acknowledging you are aware of this at your first advising session. If you prefer not to sign the consent form, the advisor will not record notes about you on the ACSAS.
- In this program, advisors work as a team with the Coordinator and the Student Success Specialist for your Faculty or School.
- Information about your academic progress may be shared among some members of the team. This information is shared *only when necessary* to ensure you receive the most accurate, up-to-date and relevant advice and support.
- Information of a personal nature is *not* shared; in cases where your personal situation is interfering with your ability to succeed in your program, you will be referred to a qualified, professional counsellor in Student Services.
- You can ask the advisor not to record or share a particular piece of information.
- You can request to look at the notes an advisor makes as part of an advising session.
- You should be aware that if you divulge information that suggests that you are a clear or imminent danger to yourself or others, or if you share information that suggests that the integrity of your program is at risk, then your advisor is obliged to pass that information on to a responsible person at the College.

**11. What forms should the student read and sign at or before the first advising session?**

- Academic Advisor – Advisee Agreement (both advisor and student keep a copy)
- ACSAS Consent Form (advisor keeps a copy)

**12. Where can an advisor get more information about these guidelines?**

- Coordinator, Academic Advising, Marni Squire, [squirem@algonquincollege.com](mailto:squirem@algonquincollege.com)