How to Document Your Appointments With Advisees

1. Log in to the Student Success Planner.

2. If the advisee has an appointment on your calendar, click on the appointment. Otherwise, click on the **Walk-In Appointment** tab.

3. The following screen will appear. If the student is a walk-in, you will need to look up the student (by Student ID, name or email).

   **NOTE:** Do not check the **Mark as Private** box. Your notes cannot be private.
4. Once you find the appropriate student, click **Select** and the student’s name will appear at the top of the screen.

5. Click on **Create**.

6. Type in the **Notes** section the reason for your meeting. Keep in mind that all notes are visible by advisors under the “Comm Log” and can be disclosed under the Freedom of Information Act (FOIA).

**IMPORTANT**: Do not make any statements about a student’s disability. When in doubt, consult with your supervisor. Notes cannot be deleted.
7. When you are done, click on **Stop**.

8. If you need to set up a follow-up appointment with the student, click on the Follow-Up Appointment button.
9. Click on **Close** to close the appointment window.