Advising Support for Faculty and Instructional Academic Staff

As we respond to the recent changes on campus, here are some guidelines to help you navigate your advising appointments with students. Keep in mind that campus has a long history of advising remotely, but the tools and expertise we use will only continue and expand.

Get Ready

1. **Give students their options.** Make sure students are aware of the various ways they can completed their advising appointment. At this time you have the option to hold advising appointments over the phone, through video (Collaborate Ultra, Zoom, or Microsoft Teams), or through email.

2. **Continue to encourage students to schedule their appointments.** Enrollment for the summer/fall 2020 semester begins on April 6th. If you have not already, make sure you are communicating with your students about how they should go about getting their advising appointment scheduled with you so they can start advising ASAP. To be accommodating to all students, please make sure that students are able to sign up for appointments electronically (through email, an appointment scheduler, or Navigate for HBID).

3. **Learn more about your resources.** If you are not familiar with video calls, take some time to learn more about the systems available to you such as Collaborate Ultra, Zoom, and Microsoft Teams. See the “Review Your Tech Options & Resources” section below for more information.

How to Successfully Conduct Online/Phone Appointments

1. **Prepare for your appointments.** This is good practice at any point, but when you are advising over video or phone, it is especially important. Make sure you have planning sheets, E-Hive access, major guides, and anything else you might need for the appointment on hand before the meeting begins. Look through the student's record ahead of time to see what classes you would recommend for them and make sure those classes will be offered in the upcoming term(s).

2. **Prepare students for their appointments.** Encourage your students to attend their meetings prepared with the classes they are thinking of taking and any questions they may have. Since students will be advising virtually, make sure they have access to a computer during that time so they can follow along in E-Hive as you go through their advising report, shopping carts, etc. Make sure you have access to what you need before the appointment begins.

3. **Check your environment.** Make sure your setting it conducive to video or phone appointments. Check to make sure you have a strong internet connection, good lighting and sound, and that your environment is free of distractions, if possible (e.g. door closed, notifications on phone/computer silenced, noises eliminated such as a ticking clock or loud furnace, etc.)

4. **Maintain confidentiality.** While you are working with your students, make sure that you are in a private setting where other people are not able to view student information that is pulled up on your computer or written on documents that you are using. Be sure to lock your computer if you need to step away to ensure data security, and make sure that any files or documents with student information is stored in a secure area that is not accessible to others.

5. **Take notes.** If a student asks questions you cannot answer immediately during the appointment, be sure to document these so you can get an answer and follow up with the student after the appointment is complete. Also, document the classes the student wishes to take so you have them as a reference in case there are questions later.
6. **Track your appointment in advisor notes/appointment summaries.** Be sure to track your advising appointments in E-Hive (or Navigate for HBJD) to ensure you have a record of your appointment and how it was conducted (phone or virtual). Unless you do your advising through email, there is no automatic paper trail of your appointment. The advising note/appointment summary creates a record to show which appointments have been completed, and you can always refer back to what was discussed in the meeting to keep track of everything.

7. **Complete follow-ups, as needed.** If you told a student you needed to look further into one of their questions, don’t forget to go back and get them answers. Make sure to tie up any loose ends so students have all the information they need. It is recommended to send them a follow up email with the classes you discussed so they can refer to that when putting classes into their shopping carts.

### Review Your Tech Options & Resources

1. **Collaborate Ultra**
   a. This tool can be accessed from your My UW System Portal. Once you login, on the main page you can find a section for web conferencing where you can click into Collaborate Ultra to create a session.
   b. [General Collaborate Ultra information](#)

2. **Zoom**
   a. The University is pursuing a site-wide license and if that becomes a reality more details will be provided
   b. Many individuals currently use a personal license for Zoom that limits web conferencing to approximately 40 minutes
   c. There are some existing individuals who have Zoom licenses through the University – the Tech Services helpdesk can provide support for Zoom users

3. **Microsoft Teams**
   a. [Voice/Video Calls](#)
   b. [General Teams Information](#)

4. Technology Services training and support materials will be made available – please check our campus coronavirus website for more information

5. Still need help? Contact the Technology Help Desk: [Helpdesk@uwsuper.edu](mailto:Helpdesk@uwsuper.edu) or 715-394-8300

### Common Student Concerns

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<tr>
<th>Advising Concern</th>
<th>Answers &amp; Resources</th>
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<tbody>
<tr>
<td>Are students able to advise over spring break (March 16-March 27)?</td>
<td>Absolutely. Spring break is an excellent time to advise with any students who do not have spring break plans and want to schedule an appointment. By advising over break, this could help students to avoid any stress over scheduling their meeting when classes are in session.</td>
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<td>Do I have to use my personal phone to make calls to students?</td>
<td>While you have the options to make calls from a personal cellphone or landline, you also have the ability to make voice and/or video calls directly through Microsoft Teams. Keep in mind that if you are using a personal phone to make call, the university cannot reimburse employees for data/cell usage.</td>
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<td>Which format should I be using to conduct my advising appointments (in person, email, phone, or video)?</td>
<td>That is up to you and your students. Give them options encourage them to use whatever means work best for them. Email, phone, and video appointments are all acceptable and have been used by advisors long before the changes due to COVID-19. Just make sure you are prepared to use whatever means are decided upon by you and your student.</td>
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<td>Do I need to be concerned about FERPA violations when using different advising methods?</td>
<td>Phone calls, UWS email, Collaborate Ultra, Zoom, and Microsoft Teams are all University-approved methods for conducting advising appointments. These formats are all secure and hold to FERPA standards.</td>
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<td>When does registration begin?</td>
<td>Registration will start on April 6, 2020 for both the summer and fall semesters. Students have all been sent their specific registration date and time directly from the registrar’s office.</td>
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