SOUTHWEST
TENNESSEE COMMUNITY COLLEGE

ADVISORTRAC 101
A basic user manual for faculty

Jcb12/5/2013
Logging in to AdvisorTrac for the first time

1. Log into https://my.southwest.tn.edu and click on the AdvisorTrac icon,
or
   Open a web browser to https://advisortrac.southwest.tn.edu or, if on campus, type advisor, advise, or advice into the browser and then log in with the technet username and password.

2. On the first login and only on the first time login, setup the main menu preferences. To accomplish that, click on the TracMan icon in the upper left corner, called the Trac Navigation box. Select “My Prefs”. The screen below should come up. Uncheck all of the boxes to match the image below. Scroll down and click the Save button.

   ![My Preferences screen](image)

   This step only needs to be completed on the very first login.
Accessing a student’s record and recording a visit

Accessing a student’s record

1. From the main menu, go to the Trac Navigation box immediately to the right of the TracMan icon. Enter either the student’s Banner ID (if they know it), the student’s name (last name, comma, space, first few letters of the first name), or the student’s e-mail address without the @southwest.tn.edu. Do not hit the <Enter> key after any of those options.

2. The student’s name should appear in a list below the Trac navigation box. Select the correct student and click on the number to the left of the student’s name. That number is the student’s Banner ID.

3. A box labeled Student Entry will appear.

4. From the General Info tab you can verify the student you have selected is the correct individual via their birthday and additional info listed here.
5. A student’s LEAP/Developmental requirements can be viewed by clicking on the “Custom Campus” tab in the middle of the Student Entry screen.

6. Click on the History tab at the top of the Student Entry screen. This is the key tab to access a student’s historical records and create advising visits.

7. There are a series of sub-tabs under the History tab; Visits, Appointments, Prog Rpts, Registrations and Messages.

8. The default sub-tab is Visits. Any past advising sessions and notes appear here.

9. The Registrations sub-tab will display the student’s unofficial academic transcript for course taken at Southwest. It includes section numbers and faculty names for courses as well.

10. The Documents tab is where documents pertaining to this student can be uploaded. Please refer to the Adding Documents section later in this manual for instructions on uploading documents.
Recording an advising session

1. The first sub-tab that appears under the History tab is Visits. This is the tab where past visits can be viewed and new visits are recorded. Directly under the list of sub-tabs is a button labeled “New...”. Click on this button to create a new visit for this student.

2. Enter the date of the advising session. There are several options for doing this. Click within the date box or on the small calendar picture and then select a date. If recording the session with the student in the office then click on the word Date. This will enter today’s date and the current time for the start time and automatically fill in 30 minutes later for the end time.
3. If need be, click on the Time In box to adjust or enter the approximate time and duration spent with the student.

4. In the Location box, enter where the advising session took place; office, email, phone, classroom, hallway, etc.

5. Select a Reason for the visit. This can be a number of items such as degree audit, graduation or advising. The reasons are listing in alphabetical order.

6. In the Notes box, enter the appropriate notes and information. Notes can be typed directly in this box or in Word and then pasted into the notes box. The notes should summarize the visit and include any important details covered with the student.

7. Additionally, notes must list any course recommendations for the next term if the session with the student covered course selections. To make that easier, the Course Entry Window link at the bottom right of that box will open an additional course entry window. Simply enter the course rubric and number, without spaces between them, and the course title will automatically fill in beside it. Once completed, this window can be printed using the Print this Page button to give to the student. Next, click on the Copy Courses to Clipboard button and close that window.

8. Now click in the Notes box and then right-click in it and click on Paste. This will paste the Course numbers and Titles into the notes section. (Please note: this feature currently only works in Internet Explorer on a PC. Work is underway to address this limitation)

9. Click the Save button when finished to save the visit.

10. After saving, close the window by clicking the red X at the top right of the box unless you are advising the student for registration in the next or upcoming semester. If that is the case proceed to the next section, “Clearing a Student to Register”
Clearing a Student to Register

To clear a student to register for the next term, record an advising session (See previous section on "Recording an advising session"). After saving the session, the "Send Note to student@southwest.tn.edu" button will appear. Click on that button to clear the student to register. This process can take up to 15 minutes to complete. If the student wants to register immediately they can with a temporary registration PIN send in the email generated in the email sent to them.

Below is the screen AdvisorTrac will display after clicking on the "Send Note to student@southwest.tn.edu" button. This is the content of the e-mail that is sent to the student.

NOTE: It is very important to use the above method in AdvisorTrac as this is the way that a student is cleared to register.
Adding Documents to a Student’s record

After logging a student into the system, look up the student as covered in the first section of the document, Accessing a student’s records and recording a visit.

1. Click the Documents tab.

2. Any previously uploaded documents will be listed and available for viewing.

3. To view a previous document, click on the icon to the left of the document name.

4. To upload a new document, click the Upload… button.

5. Select the type of document in the Type area.

6. Enter a Follow Up Date if one is needed.

7. Add any notes in the Notes section that are needed to accompany the document.
8. Click the Browse... button and find the file to upload.

9. Select the file and click the Open button.

10. Click on the Upload or Save Changes button to upload and save the file.

11. To upload another file, click the "Return to List" button to return to the list of documents and follow the steps again.

12. When finished with this section, click the red X at the top of the box.
Annual Evaluation report
The annual report for uploading into the faculty evaluation system appears as an easy to run favorite report.
1. From the main menu page (the first page that appears after logging in), look for the Quick reports section below the Trac Navigation box.

2. Move the mouse over the Faculty Evaluation Advising Report, the option to have the report emailed as an attachment appears. Select that option, enter the email address that you want the report sent to, and click on OK.”

3. To view and print the report immediately, simply click on the report name (Faculty Evaluation Advising Report) and a new window will open and display the report.

To access the report the long way (with additional options)
1. After logging in, click on the TracMan or look on the left side of the screen towards the top for the Reports link.

2. Select Reports.

3. In the drop down menu, select Scheduling.

4. In the box below the drop down menu, select the last item, Consultant Appointments/Visits.
5. Select the date range for the report. Note; an actual date must be clicked on in the calendar tool, such as May 16, 2012. Leave the format as HTML at the bottom of the box.

6. Click Generate and the report will appear in a new tab or window.

7. To save the report as an electronic file follow these steps.

   - At the top of the browser, click File and then click Save As.
   - Name the file, something meaningful.
   - For "File Type" or "Format" (named differently for different browsers), select "HTML" or "Web Page". It may be called something different depending on the browser used.

The key point is to save it as a web page.

The report might also be able to be saved as a PDF, depending on the software and capabilities of the computer. This option, if available, should be listed under the File Type or Format area.
Confidentiality of Student Records

Please be aware of the importance of maintaining student record confidentiality. Student information of any kind including, but not limited to, grades, attendance, and individual student work must be kept only in secure locations or under the direct control of school employees who have been authorized to have access to student information. Please review the guidelines below for more details.

Please make sure that student information and records are kept confidential according to the appropriate FERPA regulations (Family Educational Rights and Privacy Act - 20 U.S.C. § 1232g; 34 CFR Part 99). In addition to federal FERPA policies, the TBR has established its own policies (TBR Policy No. 3:02:03:00) and guidelines (TBR Guideline S-020) regarding the confidentiality of student records as listed below.

U.S. Department of Education
FERPA (Family Educational Rights and Privacy Act) Policies

TBR Policy No. 3:02:03:00 Subject: Confidentiality of Student Records
http://tbr.edu/policies/default.aspx?id=1518

Policy 3:02:03:00
Subject: Confidentiality of Student Records
The following policy of the State Board of Regents concerning access to educational records shall apply to all institutions and area vocational-technical schools governed by the Board.

It is the policy of the State Board of Regents and its institutions and schools to comply with the Family Educational Rights and Privacy Act ("Buckley Amendment") and, in so doing, to protect the confidentiality of personally identifiable educational records of students and former students. Each faculty and staff member employed by the Board of Regents or its institutions and schools is individually responsible for complying with the Buckley Amendment, and violations may subject the faculty or staff member to disciplinary action. Appropriate references to this policy shall be included in each faculty and staff handbook and shall be included in orientation sessions for new employees who work with or have access to student records.

Each institution and school shall develop policies and procedures consistent with SBR guidelines adopted pursuant to this policy, and students shall be informed annually of their rights under said institutional policies and procedures.

Source: SBR Meeting September 18, 1987
Guideline S-020
Subject: Confidentiality of Student Records

These guidelines are issued to aid TBR institutions and schools in implementing TBR Policy No. 3:02:03:00 Confidentiality of Student Records. Each institution and school shall develop policies and procedures consistent with these guidelines and TBR Policy No. 3:02:03:00.

I. DISSEMINATION OF INSTITUTIONAL POLICIES AND PROCEDURES
The policies and procedures of each institution and school shall include a listing of the types and locations of educational records maintained by the institution and the titles of persons responsible for each. Each institution and school shall specify where copies of the institutional policies and procedures may be obtained and shall furnish copies to students upon request. Any charge for such copies may not exceed that charge normally made for similar types of copies.

II. CONFIDENTIAL RECORDS
Except as is otherwise provided by this policy, all personally identifiable records (by name, identifier or characteristics) directly related to a student or former student shall be kept confidential unless the student signs a consent form as provided in part IV below. Such confidential records include, but are not limited to, grades, class enrollment and attendance, disciplinary records, admission records, student grievances, complaints or appeals. Disclosure of such records shall be permitted only under one of the exceptions described below.

A. Directory Information
Except as provided below, the institution may disclose directory information consistent with this policy to any person requesting such information without the consent of the student. Each institution must publish in its catalog and student handbook the information which shall be considered directory information, which shall be limited to the following:
1. Name
2. Address
3. Telephone number
4. Date and place of birth
5. Major field of study
6. Participation in officially recognized activities and sports
7. Weight and height of members of athletic teams
8. Dates of attendance
9. Degrees and awards received
10. Most recent previous educational institution attended
11. Other information of the type above specifically approved by the institution or school as acceptable directory information.

Institutional policy must provide the student the opportunity to refuse to allow disclosure of any designated directory information. The policy shall specify the procedures by which the student is to notify the institution of such refusal and the time within which the student must provide such notice. Each institution shall forward to the Office of General Counsel a list of information which shall be considered directory information. Disclosure in Bona Fide Emergency
Disclosure of student records is permitted if necessary to protect the student or other person against threat to the safety or health of either. Such disclosure may be made only in the case of an immediate bona fide emergency such that consent cannot be obtained. Such disclosure shall be limited to necessary information only and to those persons in a position to render assistance in the emergency situation.

C. Disclosure Within the Institution
Only those school officials and/or persons employed by the institution who exhibit a genuine need to know based on a legitimate educational interest may have access to a student's records. Each institution shall include in its policies and procedures a definition of "school officials" for purposes of the Buckley Amendment and shall specify categories of persons included in the definition, including any non-employees (volunteers) considered to be "school officials". Each institution shall also include a statement specifying that a legitimate educational interest shall be limited to an interest arising from the faculty/staff member's fulfillment of his/her assigned responsibilities, and disclosure shall be limited to such information as is necessary to fulfill those responsibilities.

D. Disclosure With Consent
The institution may disclose personally identifiable information with the signed written consent of the student. The
consent form must be dated and must specifically identify the particular records to be disclosed, the purpose of
the disclosure and the persons to whom such disclosure is to be made. A copy of the consent must be maintained
with the student's record to which it pertains. Unless the consent form specifies that the information may be
disclosed further, the statement attached to the disclosed information shall also include a warning against further
disclosure by the recipient.

E. Disclosure Pursuant to a Subpoena
The institution must disclose confidential student records pursuant to a lawfully issued subpoena or judicial order.
Upon receipt of such a subpoena or judicial order, the institution shall examine the subpoena or order to verify
that it has been executed by an officer of the court or other authorized official. (The Office of General Counsel for
the State Board of Regents may be contacted for assistance in verification.) Prior to disclosure, the institution
must use reasonable efforts to notify the student of the receipt of the subpoena or order and of the institution's
intent to comply. Oral notification should be followed by a written confirmation, a copy of which shall be
maintained along with a copy of the subpoena and record of the disclosure with the student's record.
The institution shall affix to the sealed envelope containing student records an affidavit from the custodian of
records stating that each eligible student whose records are within the sealed envelope was notified of the
subpoena prior to the compliance and the date on which such eligible student was notified, unless the subpoena
was issued by a federal grand jury or for a law enforcement purpose and the court of other issuing agency
ordered that the existence or the contents of the subpoena or the information furnished in response to the
subpoena not be disclosed. The sealed envelope shall then be enclosed in an outer envelope, sealed, and
directed to the appropriate entity.

F. Disclosure to Parents of Dependent Students
The institution may disclose personally identifiable student records to parents of a student only if the student is a
dependent of the parent as defined in Section 152 of the Internal Revenue Code.

G. Disclosure to Officials of Other Schools and School Systems
The institution may disclose confidential student records to officials of other schools and/or school systems in which the student is currently enrolled or seeks or
intends to enroll, provided such disclosure is consistent with the following conditions.
1. The institution makes a reasonable attempt to notify the student, and/or parent if student consents, of the
disclosure at the student's last known address. The institution does not have to attempt notice to the student
under the exceptions below.
   a. The disclosure is initiated by the student at the sending institution.
   b. The institution includes a notice in its policies and procedures that it forwards education records on request to a
      school in which a student seeks or intends to enroll.
2. The institution provides the student a copy of the records transferred upon request by the student.
3. The institution provides the student an opportunity for a hearing, as provided in IV.B, upon request by the
   student.

H. Other Exceptions
Federal regulations (See 34 C.F.R., Sections 99.1-99.67) provide for disclosure upon certain other limited
circumstances. These exceptions are narrow in scope and are strictly construed. Disclosure pursuant to these
exceptions should not be made unless specifically approved by an appropriate institution official. The Office of
General Counsel for the State Board of Regents is available for assistance in ascertaining the applicability of the
exceptions.

III. RECORD OF REQUESTS AND DISCLOSURES
Institutional policies and procedures shall specify that copies of requests for disclosures and a record of the
information disclosed must be retained with the student records for all disclosures made except those for directory
information and disclosures to other school officials. The record of disclosures may be inspected by the student,
the officials responsible for the records and by persons responsible for auditing the records.

IV. STUDENT ACCESS TO RECORDS AND RIGHT TO AMEND
Except as provided in Part A below, a student has the right to inspect, review and obtain a copy of his/her
educational records. Each institution shall include in its institutional policies and procedures developed pursuant
to this policy the procedure by which a student may request to inspect, review and/or obtain a copy of his/her
records. The procedures shall require compliance with the student's request within a reasonable time which shall
not exceed 45 days. The institution may charge the student a fee for copies which shall not exceed the
institution's normal fee for such copies. The procedure must specify any circumstances under which a student will
be denied such copies. The institution shall also, upon a student's request, provide a student with an
explanation/interpretation of his/her record.

A. Exceptions to Student Access
A student's right to access to his/her records is subject to the following exceptions:
1. For records pertaining to more than one student, a student may only view the portion of the record pertaining to
himself/herself and may not view the portion pertaining to the other students.

2. A student may not have access to financial records and statements of his/her parents or any information contained therein.

3. Students may not have access to confidential letters and confidential statements of recommendation which were placed in the student's records prior to January 1, 1975; Provided that
   a. The letters and statements were solicited with a written assurance of confidentiality or were sent and retained with a documented understanding of confidentiality, and
   b. The letters and statements are used only for the purposes for which they were specifically intended.

4. Students may not have access to confidential letters of recommendation and confidential statements of recommendation which were placed in the education records of the student after January 1, 1975 which are either
   (a) respecting admission to an educational institution;
   (b) respecting an application for employment; or
   (c) respecting the receipt of an honor or honorary recognition;

Provided that, the student has waived his or her right to inspect and review the letters/statements in a signed written waiver. A separate waiver must be provided for each category of letters/statements. The waiver may be revoked at any time; however, the revocation will not affect the student's rights as to letters previously provided under the waiver. The institution may not require such a waiver of students as a condition or prerequisite to eligibility for a program or service. The letters or statements provided under the waiver may be used only for the purpose designated on the waiver, and the student must be notified of the receipt by the institution of all letters/statements provided under the waiver.

B. Student's Right to Request Amendment

A student may request to amend his/her record if he/she feels it is inaccurate, misleading or in violation of his/her rights. Institutional policies and procedures shall specify how such requests are to be made. The institution must consider the request and convey its decision to comply or deny within a reasonable time of the request. If the request is denied, the institution shall inform the student of his/her right to a hearing. The institution policies and procedures shall specify the procedure for the hearing which shall include, at a minimum, the following:
   1. The hearing must be held within a reasonable time of the request.
   2. The notice of the hearing must include the date, place and time of the hearing and shall be sent to the student reasonably in advance of the hearing date.
   3. The hearing date must be conducted by an institution official not having a direct interest in the outcome.
   4. The student may present evidence.
   5. The student may have the assistance or representation of individuals of his/her choice, including an attorney. The institution must make its decision within a reasonable time. The decision must be based solely upon the evidence presented at the hearing and shall include a summary of the evidence and reasons for the decision. The institution shall inform the student of its decision and, if the request is denied, of the student's right to place a statement in the file commenting on the information in the file and setting forth any reasons for disagreeing with the decision. The statement must be maintained with the record and a copy provided to anyone to whom the record is provided.

The above procedures shall not be used by the student to contest the underlying action taken by the institution which has been recorded in the student's record but shall be limited to the issues of whether the record is inaccurate or misleading in recording the underlying action or whether the institution's placement of the information in the student's record is in violation of the student's rights.

V. RIGHT TO FILE A COMPLAINT

Institutional policies and procedures shall include a statement specifying to whom at the institution violations of the Buckley Amendment may be reported. A statement shall also be included that complaints of violations by the institution may be filed with the Office of the Secretary, United States Department of Education.

Source: Presidents Meeting, August 18, 1987; Presidents' Meeting February 10, 2004