

ADVISING PERC NOTE TEMPLATE

Overview

Durham Tech Advisors should use this template to create concise summary notes after every advising meeting with students. Review the PERC Note field explanations and then copy and paste the PERC Note Template to enter notes for each field as applicable. Save a copy in the appropriate ADVS Advisor Restriction in the PERC screen of Colleague and Notes in the Advising feature of Self-Service. Remember to timestamp your notes in Colleague. Notes posted in Self-Service will be viewable to students.

PERC Note Fields Explained

Active Program(s): Verify student's active program. Students can have up to 2 active programs. Check SACP or SPRO in Colleague and identify program(s) with Active status or check Progress in Self-Service.

Catalog Year: Verify the active program's catalog year to ensure students are being advised for appropriate requirements to complete and graduate with their credential. This also ensures that students utilizing financial aid and/or veteran benefits are satisfying eligibility requirements. Check the Progress feature in Self-Service to locate this information.

Term(s): Indicate which semester(s) or term(s) the PERC note is intended for.

Course Plan Semester 1: Indicate what courses have been planned and approved for registration in the upcoming semester.

Course Plan Semester 2: If applicable, indicate what courses have been planned and approved for the semester following the upcoming one as part of two-semester course planning.

How Prerequisites are Met: Indicate how the student meets the prerequisite requirements for planned courses.

FA SAP Plan: Indicate yes or no to alert advisors that a student is on a Financial Aid SAP appeal plan as a condition of a suspension appeal. If yes, the advisor should assist the student with developing an academic plan mapping their course requirements to graduation and archive that plan in Self-Service for continued use. If the student already has an academic plan developed, the advisor should use that plan to assist the student with course planning and registration. The date of the archived plan should also be noted here.

Anticipated Payment: Indicate how the student anticipates paying for courses in the upcoming semester (i.e., financial aid, tuition payment plan, veteran education benefits, scholarships). This serves as an opportunity for advisors to remind students about payment deadlines and make appropriate referrals based on their anticipated payment method.

Future Academic or Career Goals: Indicate the student's goals related to transfer and/or career prep. This can help determine if a student's selected program of study is aligned with their future goals as well as connect students to relevant resources (i.e., the Transfer Center or Career Services).

Other notes: Indicate any other pertinent information not listed above (i.e., applying for graduation, referred to the CAE for tutoring, waivers, program changes, etc.).

PERC Note Template

Copy and paste the fields below into Colleague PERC and Self-Service Advising Notes.

Active Program(s):

Catalog Year:

Term(s):

Course Plan Semester 1:

Course Plan Semester 2:

How Prerequisites are Met:

FA SAP Plan:

Anticipated Payment:

Future Academic or Career Goals:

Other notes:

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PERC Note Template Example

May 01, 2024, 1:16 PM Allegra Modlin

Active Program(s): AGE-ADN

Catalog Year: 2024

Term(s): Fall 2024, Spring 2025

Course Plan Semester 1: ENG 111 (A), ENG 112 (B), ACA 122 (A), CHM 094 (B)

Course Plan Semester 2: PSY 150 (A), PSY 241 (B), BIO 168 (16-weeks)

How Prerequisites are Met: Official HS transcript/GPA

FA SAP Plan: No

Anticipated Payment: Financial aid

Future Academic or Career Goals: Seek employment as an RN and later return to college for RN-BSN program

Other notes: Plans to complete Nurse Aide I in Summer 2025. Has registered for a Nursing Information Session.