IUP Advise Quick Reference Guide 7 Notes

Connect to the IUP VPN for full access to IUP Advise quick links.

**Access IUP Advise: https://IUPCRM.elluciancrmadvise.com**

Enable pop-up windows.

Notes

IUP Advise allows advisors and other university employees to add notes to a student's profile, similar to what was previously done in the advising profile. **Academic-related notes students need to see must be placed in Degree Works**. IUP Advise notes are not visible to students, but they are visible to everyone who has access to IUP Advise. Notes in this platform are meant to be related to the success of students (missed meetings, outreach for registration, interest in an internship).

Please review IUP's FERPA policy regarding student's personal and academic information.
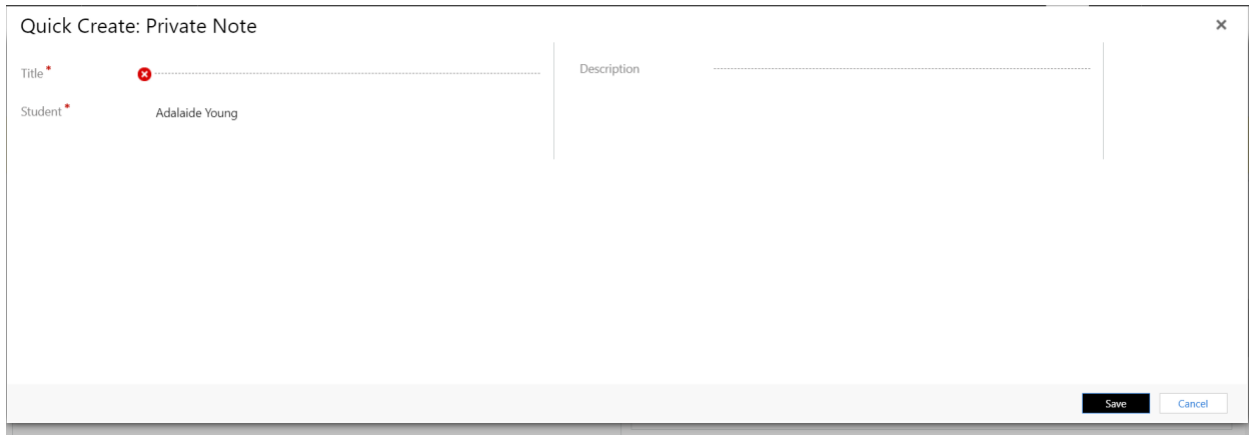
With this platform you can create two types of notes, **shared** and **private** notes. Both types of notes can be created from a student's profile. Private notes will **only be visible** to you or other users you share them with.
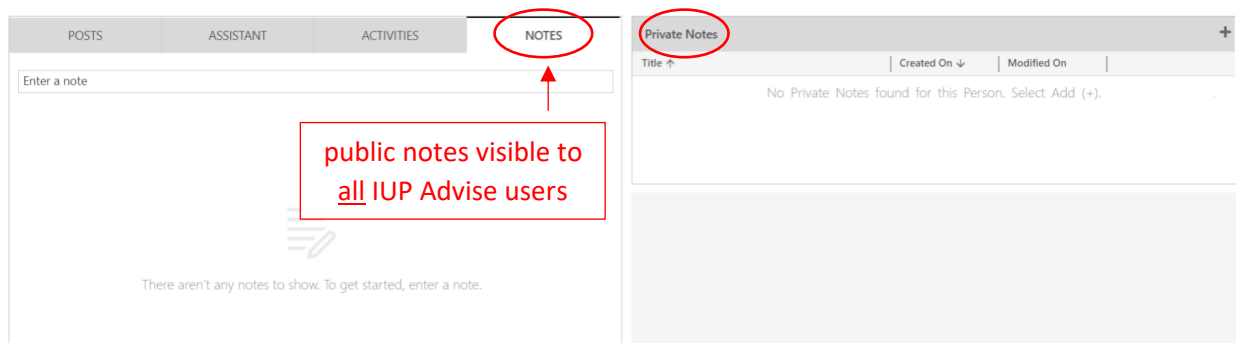
General **notes** can be added to a student's profile by simply clicking where it says **enter a note**. Once you have provided your information, you can select **done**. You also can attach documents if needed.

To add a **private note**, you will want to select the **+** symbol on the right-hand side of the private note section.

Once you select the **+** symbol, you will be presented with the screen below. Provide a title and description for your note and select **save** when you are finished.

To share a **private note** with another user, find the note on the student's profile, select the note and hit **share**. You will then use the **look up function** to find the user you wish to share the note with.