

Entering and Viewing a Student's Advising Notes

Navigating to Advising Notes:

1. Use the **Student Lookup** located on your **CalCentral Dashboard** to navigate to the **Student Overview**. To do this, search for the student and then click on the student's name.

2. Click **Advising Notes**.

The Advising Notes page consists of three parts:

1. **Student Information**- This includes the Student ID, UID, and Date of Birth. Click **Show Contact Information** to display the student's listed address, phone email and phone number.
2. **New Note**- This is where you will add a new note.
3. **Note History**- This includes all past notes relating to the student.

Create a New Note: Fill out the following information:

Select the Category- Click the  button to select a category.

Select the Subcategory- Click the  button to select a subcategory.

Note Priority- This feature is optional, however you can use Note Priority as a filter. Select Low, Medium, or High.

Note Detail- This is where you can input your note.

Topics- Adding topics will help you locate this note later using the Filter option. You may add as many of the listed topics as apply to the note.

Add Attachment- If you need to attach additional documents or forms do so here. Click Add Attachment and then select a file from your computer.

Click **Save Note**.

Create Note Template: If there is a note that you use frequently, you can create a template for it.

To create a template, first fill out all of the information listed above. Then click **Create Note Template**.

You will be asked to name the template.

Click **Save**.

The screenshot shows the 'New Note' form with the following fields and buttons:

- Category (Required):** Dropdown menu with 'Administrative' selected.
- Subcategory (Required):** Dropdown menu with 'Entry w/o Contact' selected.
- Note Priority (Optional):** Dropdown menu.
- Note Detail:** Large text area for the note content.
- Topics (To remove a Topic, select it again in the dropdown):** List of topics.
- Show More Note Options:** Button highlighted with a red box.
- Create Note Template:** Button highlighted with a red box.
- Add Attachment:** Button highlighted with a red box.
- Save Note:** Button at the bottom.

The screenshot shows the 'Store Note Template' dialog box with the following fields and buttons:

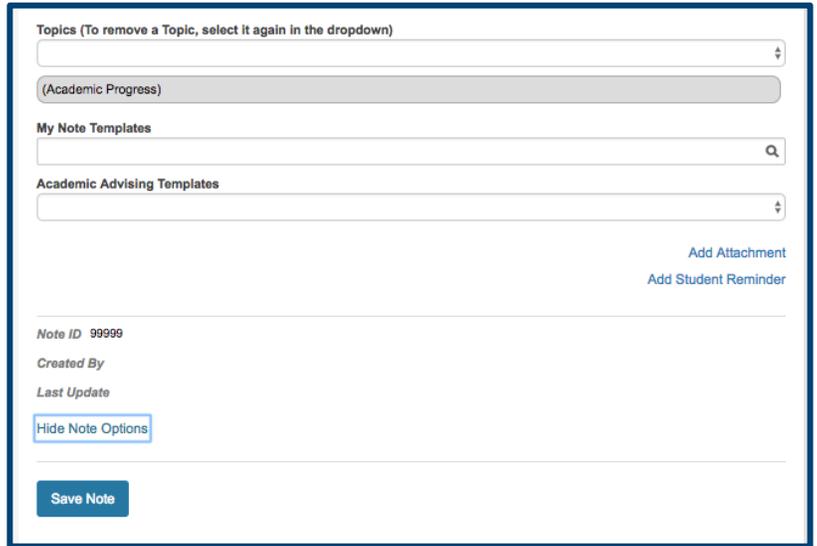
- *Enter Template Title:** Text input field with 'Check In Completed' entered, highlighted with a red box.
- Save:** Button at the bottom.

The background shows the 'Note History' table with a row for 'Ms Laura Imai | August 23, 2016 | 10:52 AM' and 'Appointment Type - Appeal Procedures'.

Access Saved Templates: Once you have created a template, you can access it by clicking **Show More Note Options**.

Click the  button next to **My Note Templates**. A list of your saved templates will appear.

Choose the desired template, and the information will aggregate onto the current note.



This screenshot shows the top portion of a note editing form. At the top, there is a dropdown menu for 'Topics' with '(Academic Progress)' selected. Below this are two search bars: 'My Note Templates' and 'Academic Advising Templates'. The 'My Note Templates' search bar has a magnifying glass icon. At the bottom right of this section are two links: 'Add Attachment' and 'Add Student Reminder'. Below the search bars, there are fields for 'Note ID 99999', 'Created By', and 'Last Update'. A 'Hide Note Options' button is highlighted with a red box. At the very bottom is a 'Save Note' button.



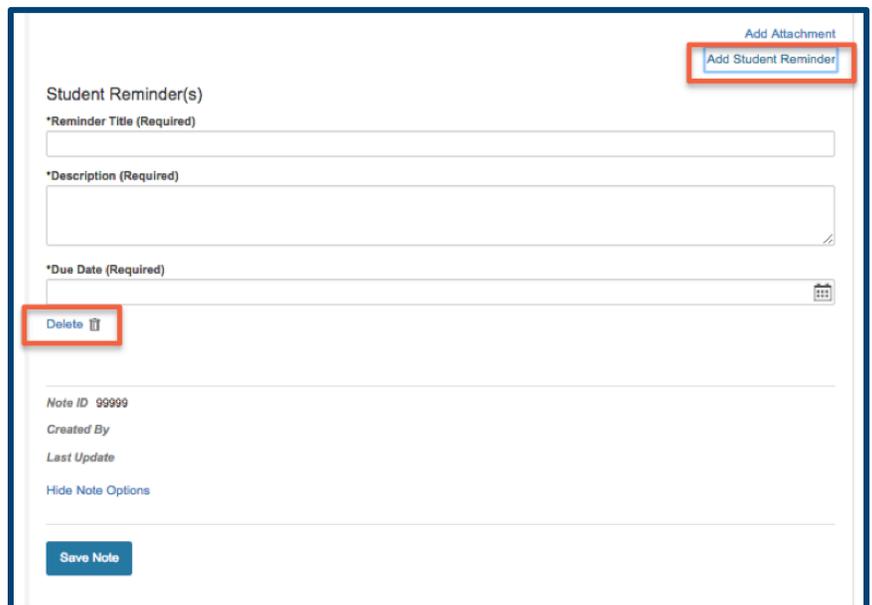
This screenshot shows a search results window. It has a 'Cancel' button on the top left and a 'Lookup' button on the top right. The search criteria is 'My Note Templates'. Under 'Search Results', there is a table with one entry: 'Check In Completed'. The table has a 'Title' header. There are also icons for grid and list views.

Add a Student Reminder: This function allows you to add a reminder to the student's CalCentral. This will help them remember a certain task they must complete.

Click **Add Student Reminder** and then fill out the required information.

You may also delete a reminder that you have previously added.

Click **Save Note**.



This screenshot shows the 'Add Student Reminder' form. At the top right, there are links for 'Add Attachment' and 'Add Student Reminder', with the latter highlighted by a red box. The form has three required fields: '*Reminder Title (Required)', '*Description (Required)', and '*Due Date (Required)'. Below these fields is a 'Delete' button with a trash icon, also highlighted by a red box. At the bottom, there are fields for 'Note ID 99999', 'Created By', and 'Last Update'. A 'Hide Note Options' link is also present. At the very bottom is a 'Save Note' button.

View Note History: You have access to all previously created notes in the **Note History** section of this page. Initially, notes will be ordered by the date they were created.

Notes created by other advisors will have the **View** option while notes you created will have the **Edit** option. Clicking either of these aggregates the note details to the **New Note** section on the left.

Search Results		26 rows
Edit Jacob Tracy December 5, 2016 01:44 PM		00026
Administrative - Document		
Received students transcript from UNLV. Attaching for advisor review.		
Topic(s): Transfer Coursework		
 Attachment(s)		
Edit Miss Sara Veverka December 5, 2016 01:30 PM		00025
Appointment Type - Dbl Major/Simultaneous Degree		
Edit Jacob Tracy December 5, 2016 10:37 AM		00024
Appointment Type - Degree Check		
Reviewed students APR. Student is on track to graduate in Spring 2017.		
Edit Jacob Tracy December 5, 2016 10:24 AM		00023
Appointment Type - Change of College		
Student came in to discuss Undeclared Senior hold. Student will meet with Cog Sci advisor to declare major. Cog Sci advisor will need to release hold once major is declared.		

Editing a Note: When you select **Edit** on a note in **Note History**, the **Edit Note** button will become active.

NOTE: You can only edit notes that you have created.

Select **Edit Note** to make changes to the existing note.

When you are finished, click **Save Note**.

Filter Note History: You can use the Filter option to sort through the student’s past notes. You can filter by one or more of the following:

- Advisor
- Note Type- Category, Subcategory or Priority
- The note text
- Date range
- Topic
- Note Items

Adding detail when creating notes facilitates the filter process.

Support:

For questions or assistance, please contact the SIS Project:

- Call **510-664-9000** (press **option 6**)
- Email: sishelp@berkeley.edu
- Submit a ticket: https://shared-services-help.berkeley.edu/new_ticket/it

For other jobs aids and videos, go to:

- <http://sis.berkeley.edu/students>