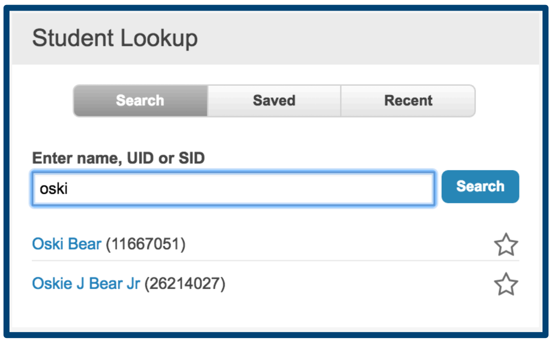
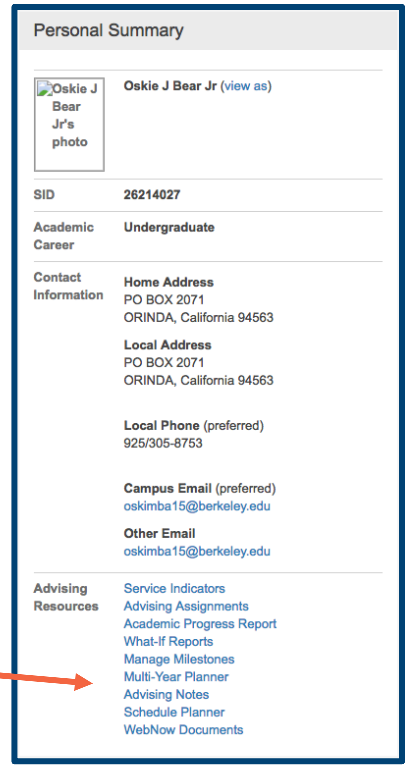
Entering and Viewing a Student's Advising Notes

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.

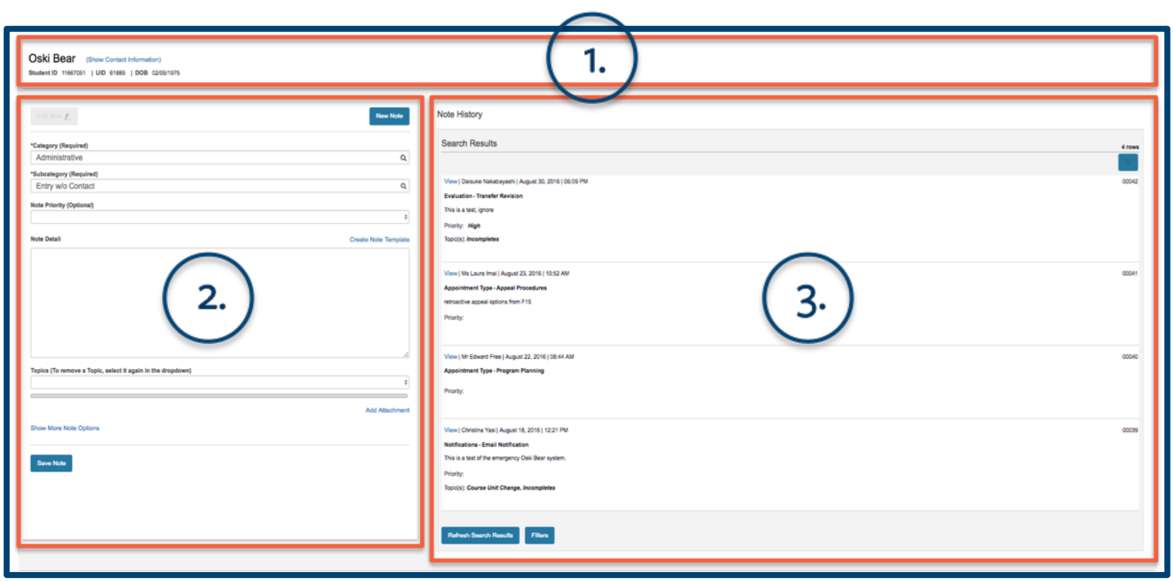


2. Click **Advising Notes**.

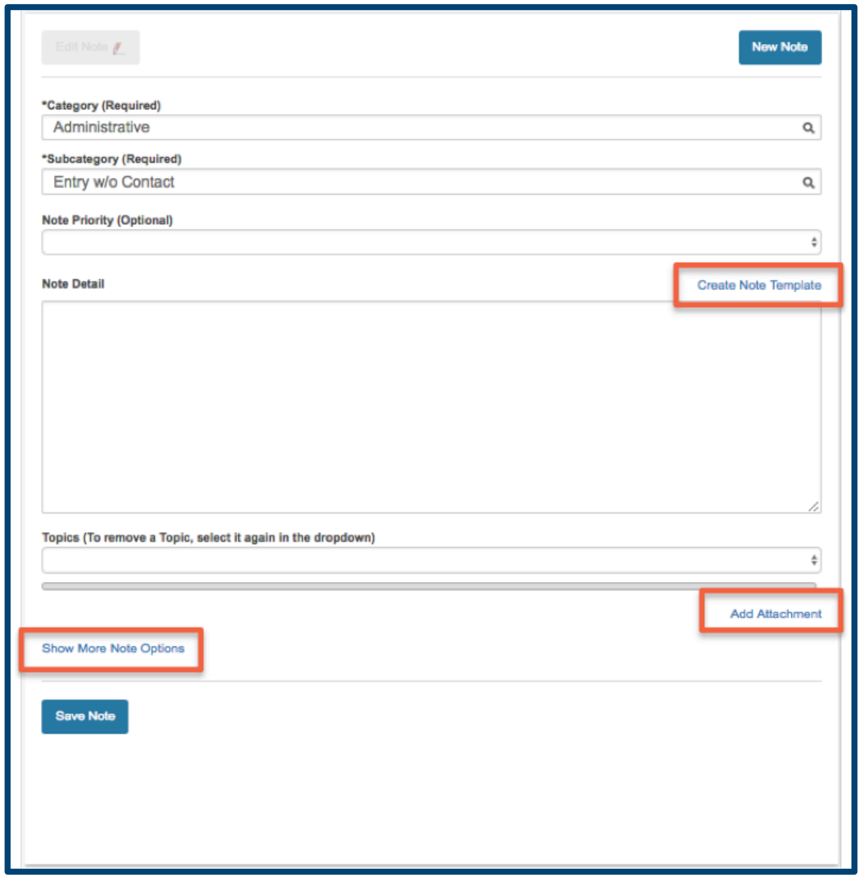


The Advising Notes page consists of three parts:

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.

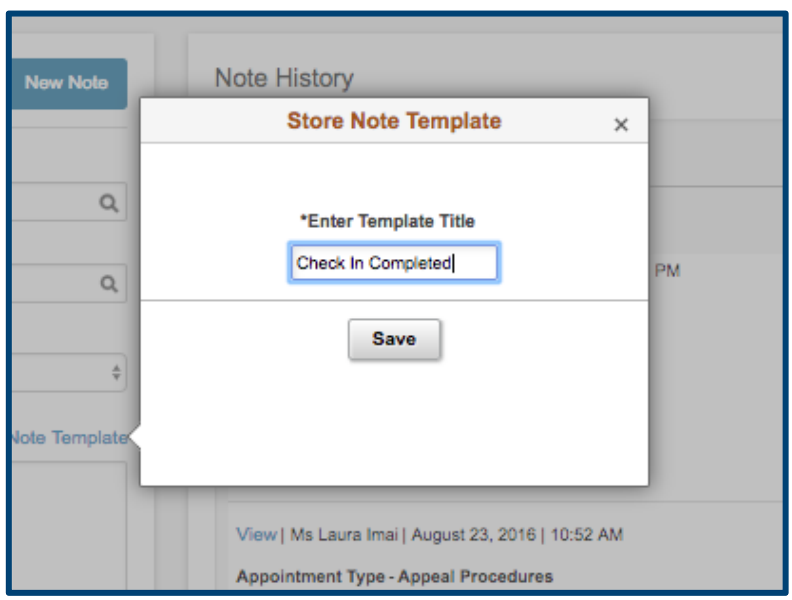
Click **Save Note**.

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.

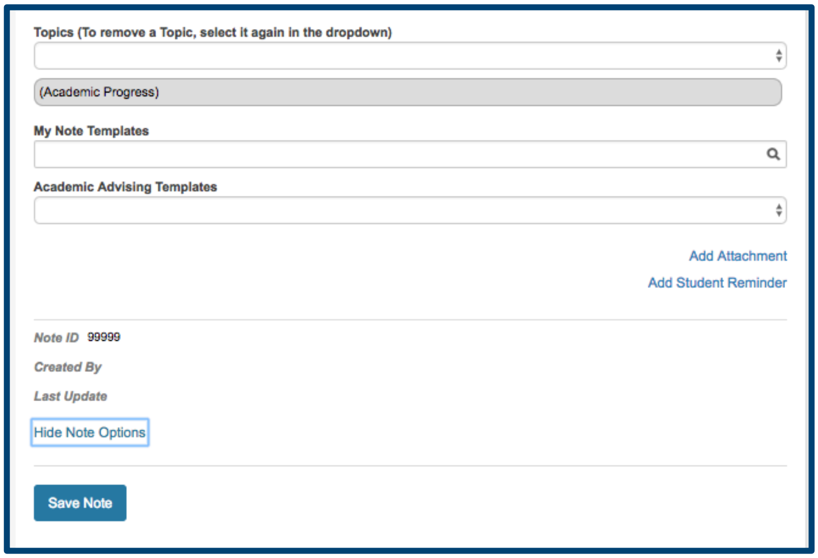
Click **Save**.



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.

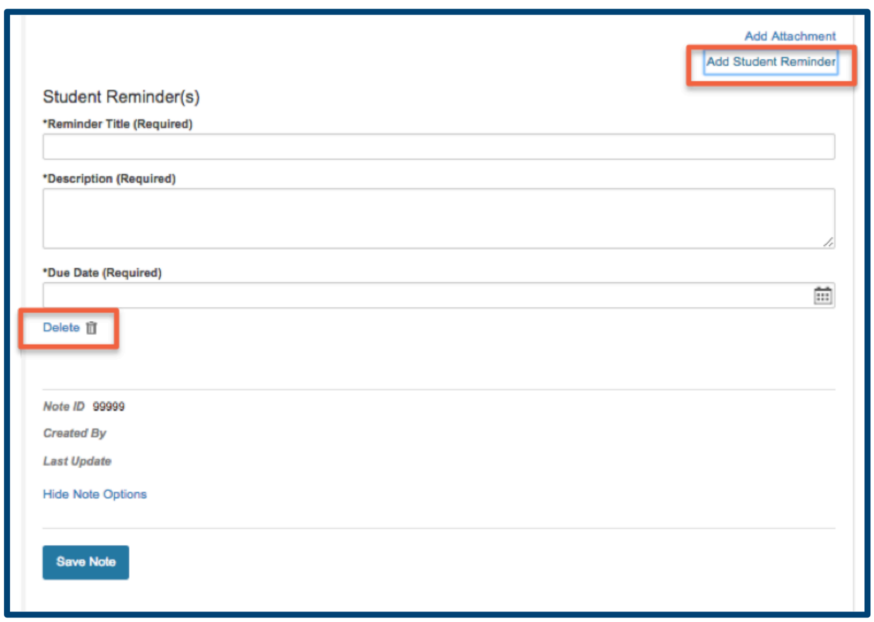


Add a Student Reminder: This function allows you to add a reminder to the student's CalCentral. This will help them remember a certain task they must complete.

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

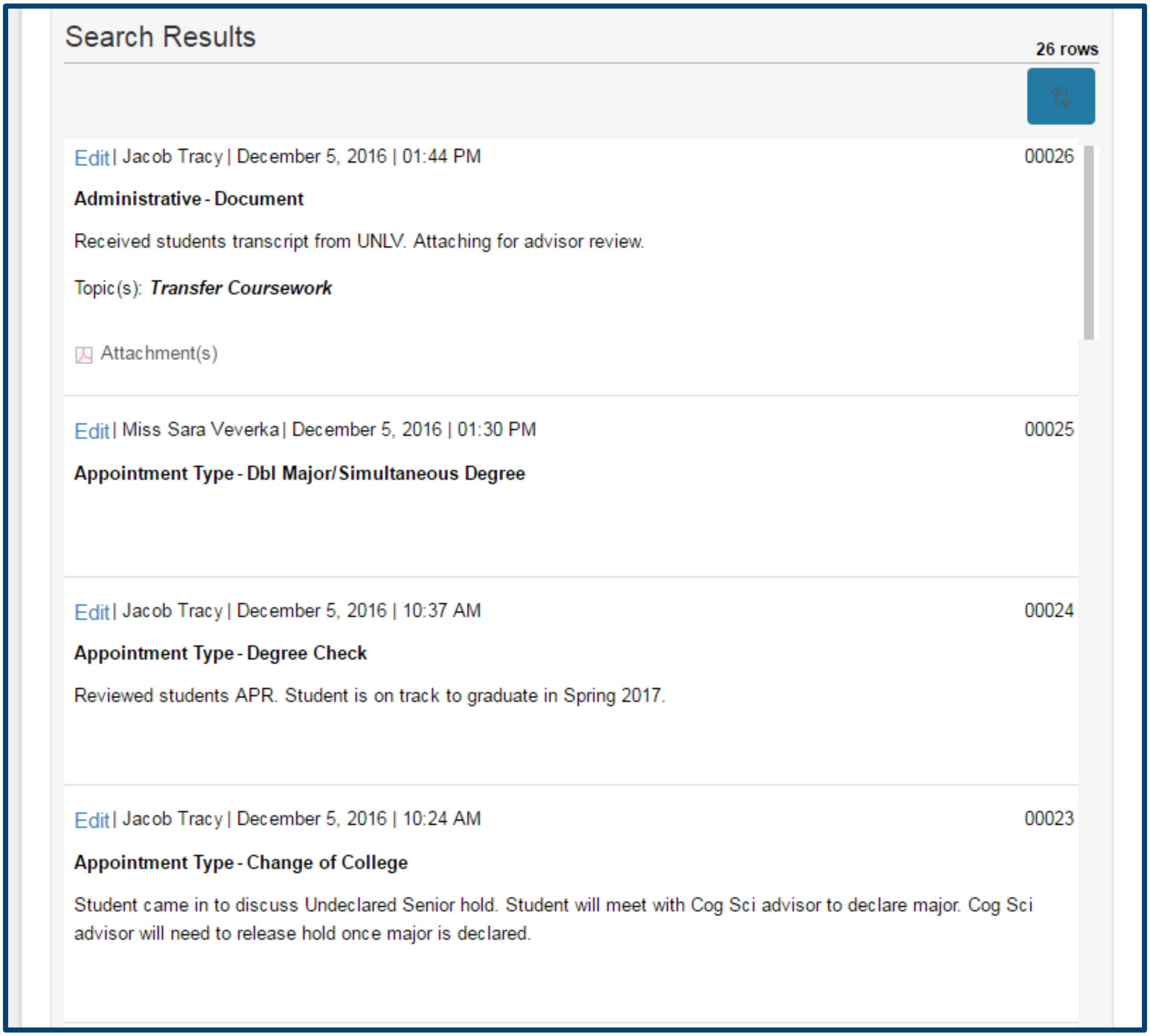
You may also delete a reminder that you have previously added.

Click **Save Note**.



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.

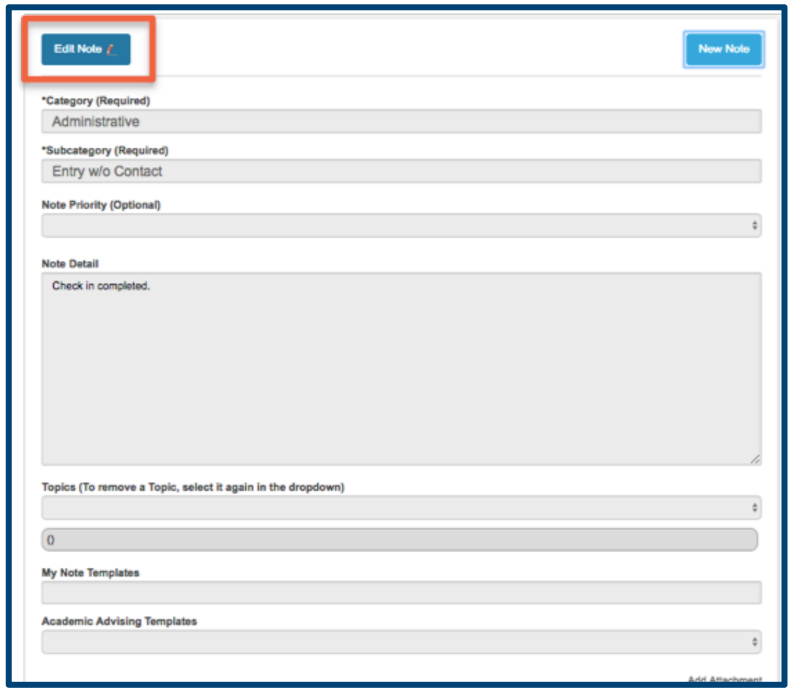


Editing a Note: When you select **Edit** on a note in **Note History**, the **Edit Note** button will become active.

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

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

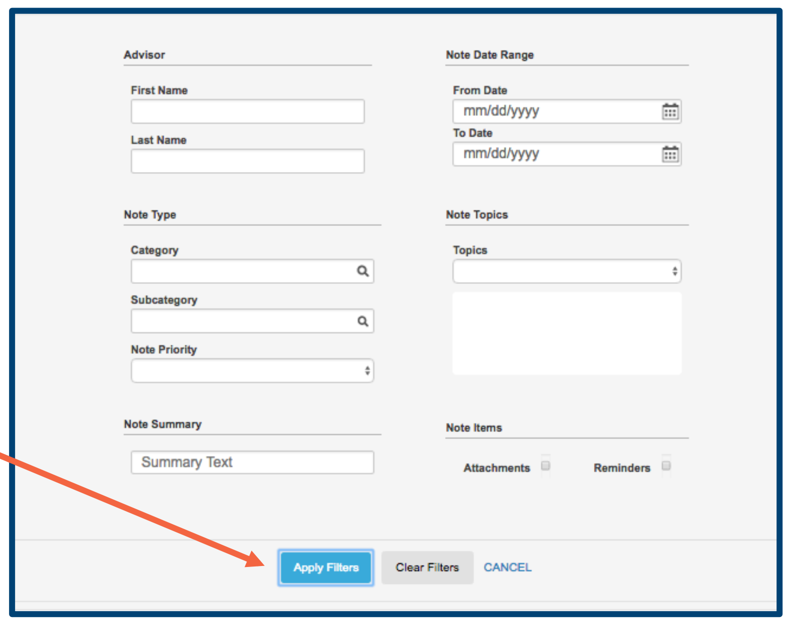
When you are finished, click **Save Note**.



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