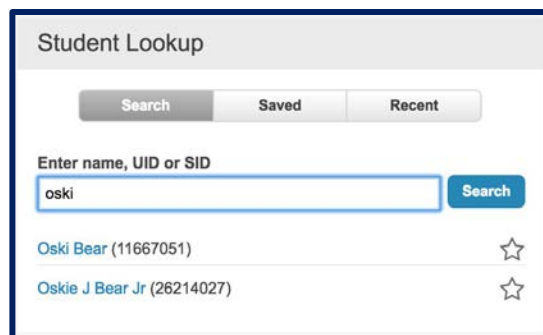


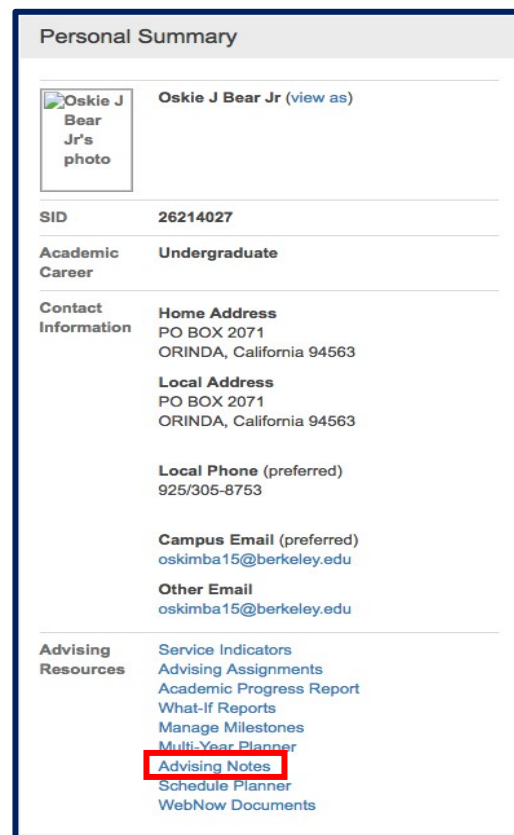
# How to Enter and View a Student's Advising Notes

This job aid describes the process for creating and viewing a student's 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 name and the click on the student's name.

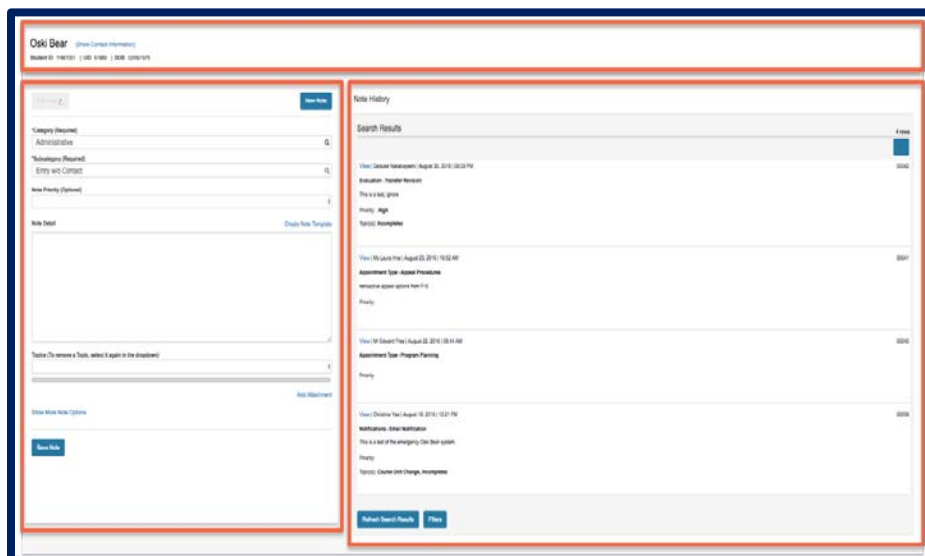


2. Select **Advising Notes**.



The Advising Notes pages consists of 3 parts:

1. **Student Information**  
Student ID, UID, DOB
2. **New Note**  
This is where you add a new note.
3. **Note History**  
Displays all past notes.



To **Create a New Note**: Fill out the following information.

Select the **Category**: Click the magnifying glass to select category.

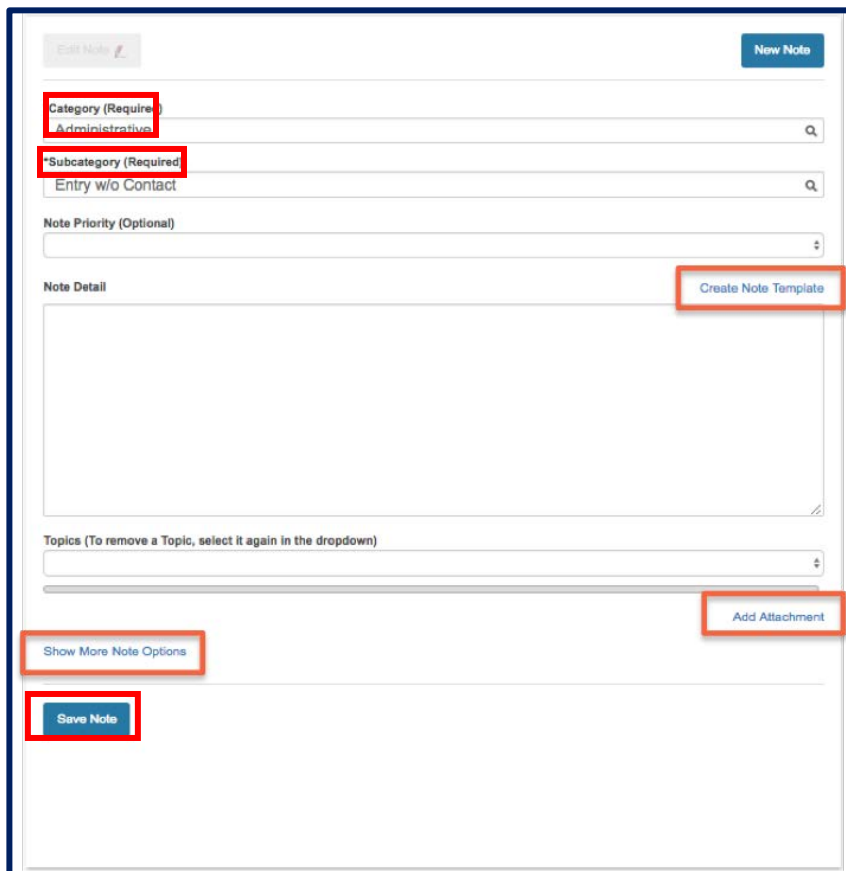
Select the **Subcategory**: Click the magnifying glass to select a subcategory.

**Note Priority**: *Optional*; used as a filter. Select Low, Medium or High.

**Note Detail** is where you input your note.

**Topics** will help you locate this note later using Filter option

**Add Attachment** to attach additional documents. Click Add Attachment and select file from your computer.



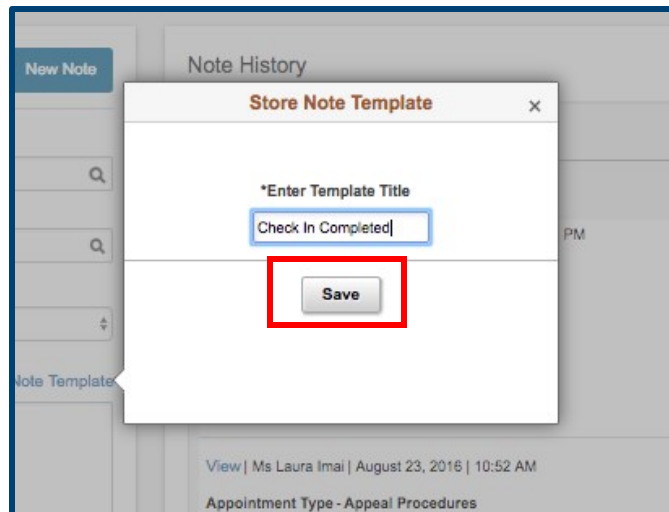
### 3. Save Note.

**Create Note Template:** for frequently used notes you can create a template.

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

Name the Template (you will be prompted to do this).

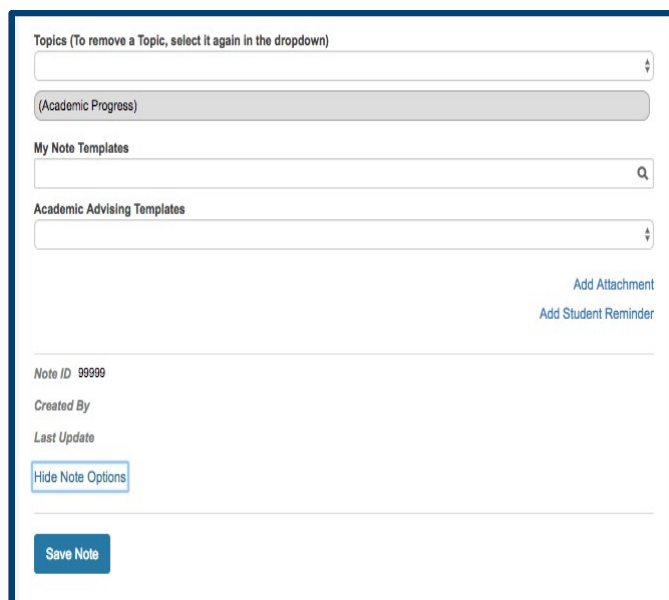
Click **Save**.



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

Click the magnifying glass next to **My Note Templates**. A list of your saved templates will display.

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



**Add Student Reminder:** This function allows you to add a reminder to the student's CalCentral. This will help them to 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**

The screenshot shows a form titled "Student Reminder(s)". It has three required text input fields: "Reminder Title (Required)", "Description (Required)", and "Due Date (Required)". Below the "Due Date" field is a "Delete" button. At the bottom of the form is a "Save Note" button. In the top right corner, there is an "Add Attachment" link and a button labeled "Add Student Reminder". Below the form, there are fields for "Note ID 99999", "Created By", "Last Update", and a "Hide Note Options" link.

**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 date 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.

The screenshot shows a "Search Results" table with 26 rows. The table has columns for "Edit", user name, date, time, and ID. The first row shows a note by Jacob Tracy from December 5, 2016, at 01:44 PM, with ID 00026. The note is titled "Administrative - Document" and describes receiving a student's transcript from UNLV for advisor review. The second row shows a note by Miss Sara Veverka from December 5, 2016, at 01:30 PM, with ID 00025. The note is titled "Appointment Type - Dbl Major/Simultaneous Degree". The third row shows a note by Jacob Tracy from December 5, 2016, at 10:37 AM, with ID 00024. The note is titled "Appointment Type - Degree Check" and describes reviewing a student's APR. The fourth row shows a note by Jacob Tracy from December 5, 2016, at 10:24 AM, with ID 00023. The note is titled "Appointment Type - Change of College" and describes a student's Undeclared Senior hold.

Edit	User	Date	Time	ID
<a href="#">Edit</a>	Jacob Tracy	December 5, 2016	01:44 PM	00026
<b>Administrative - Document</b>				
Received students transcript from UNLV. Attaching for advisor review.				
Topic(s): <i>Transfer Coursework</i>				
<a href="#">Attachment(s)</a>				
<a href="#">Edit</a>	Miss Sara Veverka	December 5, 2016	01:30 PM	00025
<b>Appointment Type - Dbl Major/Simultaneous Degree</b>				
<a href="#">Edit</a>	Jacob Tracy	December 5, 2016	10:37 AM	00024
<b>Appointment Type - Degree Check</b>				
Reviewed students APR. Student is on track to graduate in Spring 2017.				
<a href="#">Edit</a>	Jacob Tracy	December 5, 2016	10:24 AM	00023
<b>Appointment Type - Change of College</b>				
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:** Select Edit on a note in **Note History** and 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 finished, click **Save Note**.

The screenshot shows the 'Edit Note' form with the following fields and sections:

- Edit Note** (button, highlighted with a red box)
- New Note** (button)
- \*Category (Required)**: Administrative
- \*Subcategory (Required)**: Entry w/o Contact
- Note Priority (Optional)**: [Dropdown]
- Note Detail**: Check in completed.
- Topics (To remove a Topic, select it again in the dropdown)**: [Dropdown]
- My Note Templates**: [Dropdown]
- Academic Advising Templates**: [Dropdown]

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

- Advisor
- Note Type: Category, Subcategory or Priority
- Note Text
- Date range
- Topic
- Note Items

Adding detail when creating notes facilitates the filter process.

The screenshot shows the filter options form with the following sections and fields:

- Advisor**: First Name, Last Name
- Note Date Range**: From Date, To Date
- Note Type**: Category, Subcategory, Note Priority
- Note Topics**: Topics
- Note Summary**: Summary Text
- Note Items**: Attachments, Reminders
- Apply Filters** (button, highlighted with a red arrow)
- Clear Filters** (button)
- CANCEL** (button)

---

**Support:**

For questions or assistance, please contact SIS Production Support:

- Email: [sishelp@berkeley.edu](mailto:sishelp@berkeley.edu)
- Call 510-664-9000 (press option 6)

For additional SIS resources, please visit:

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