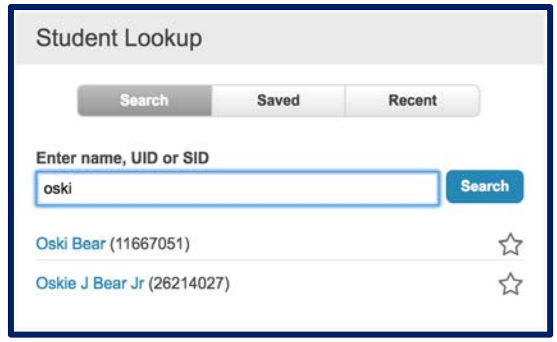
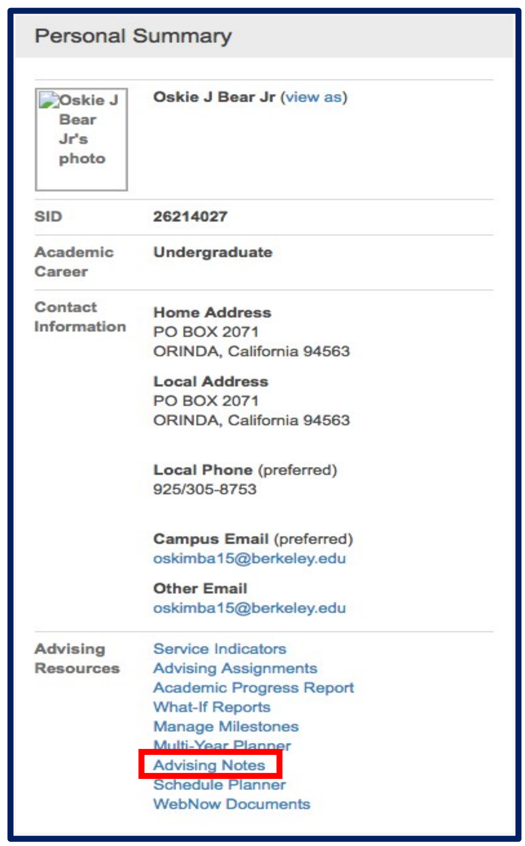
How to Enter and View a Student’s Advising Notes

This job aid describes the process for creating and viewing a student’s advising notes.



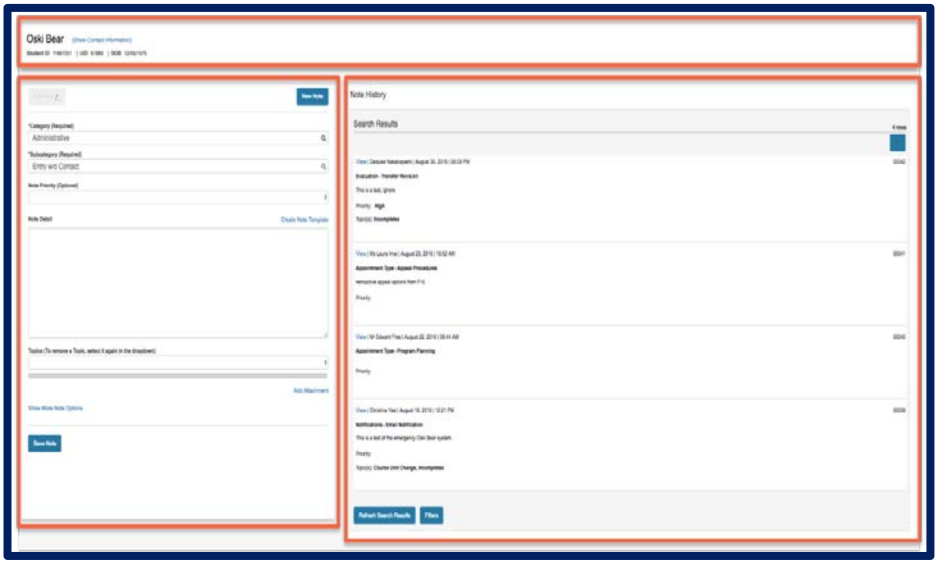
1. Use the **Student Lookup** located on your **CalCentral Dashboard** to navigate to the **Student Overview**. To do this, search for the student name and the click on the student’s name.



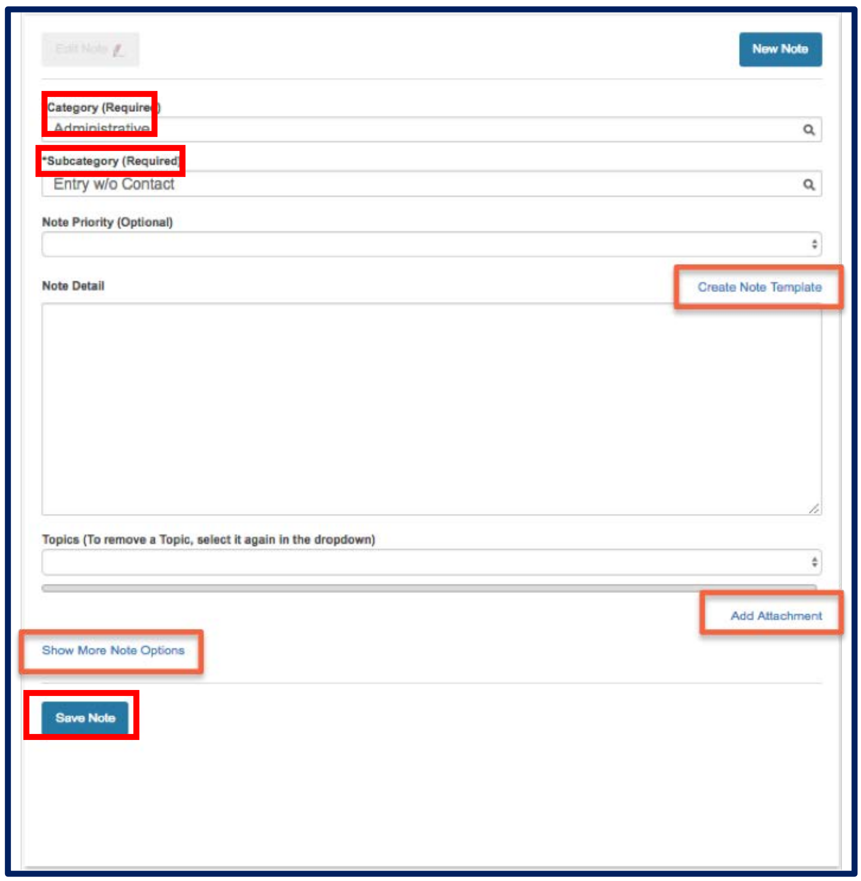
2. Select **Advising Notes**.

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.

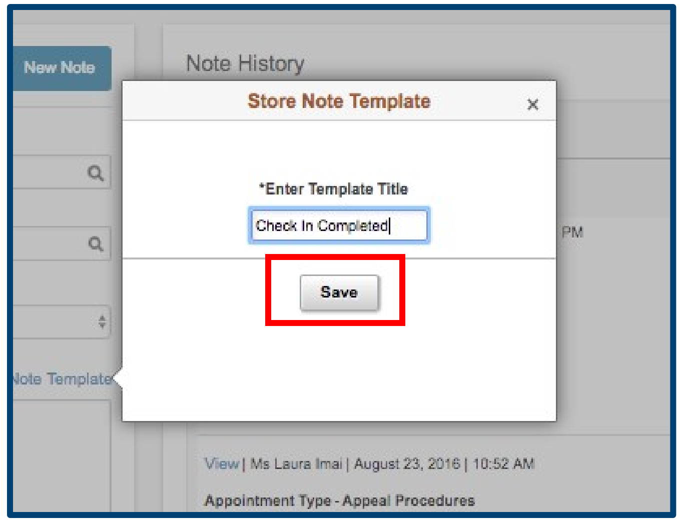
Note Priority: *Optional*; used as a filter. Select Low, Medium or High.

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**.

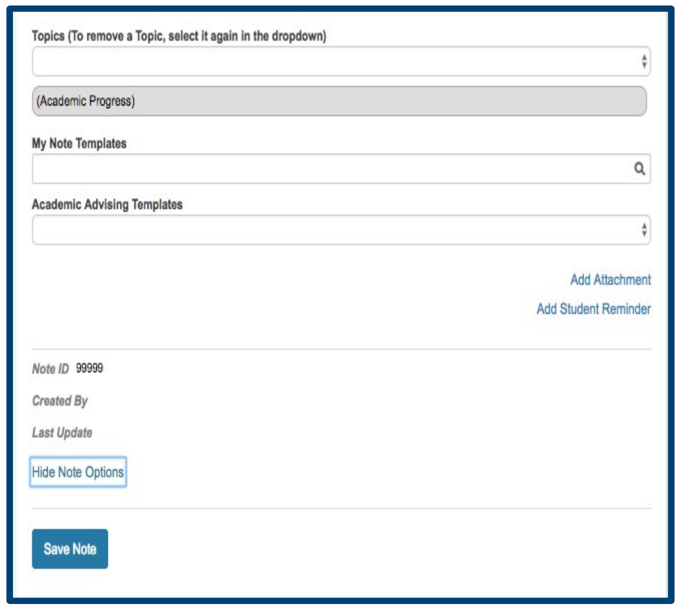


Create Note Template: for frequently used notes you can create a template.

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.

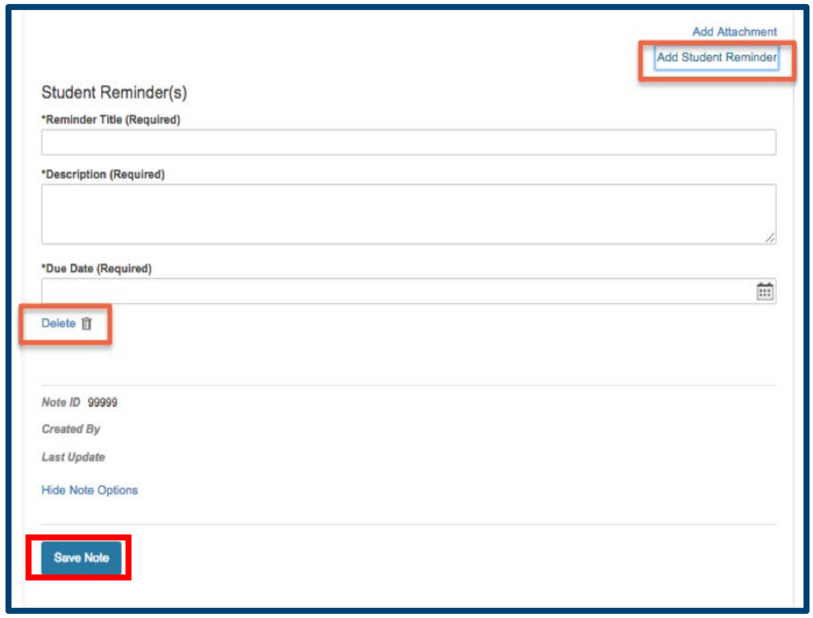
Choose the desired template and the information will aggregate onto the current note.

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.

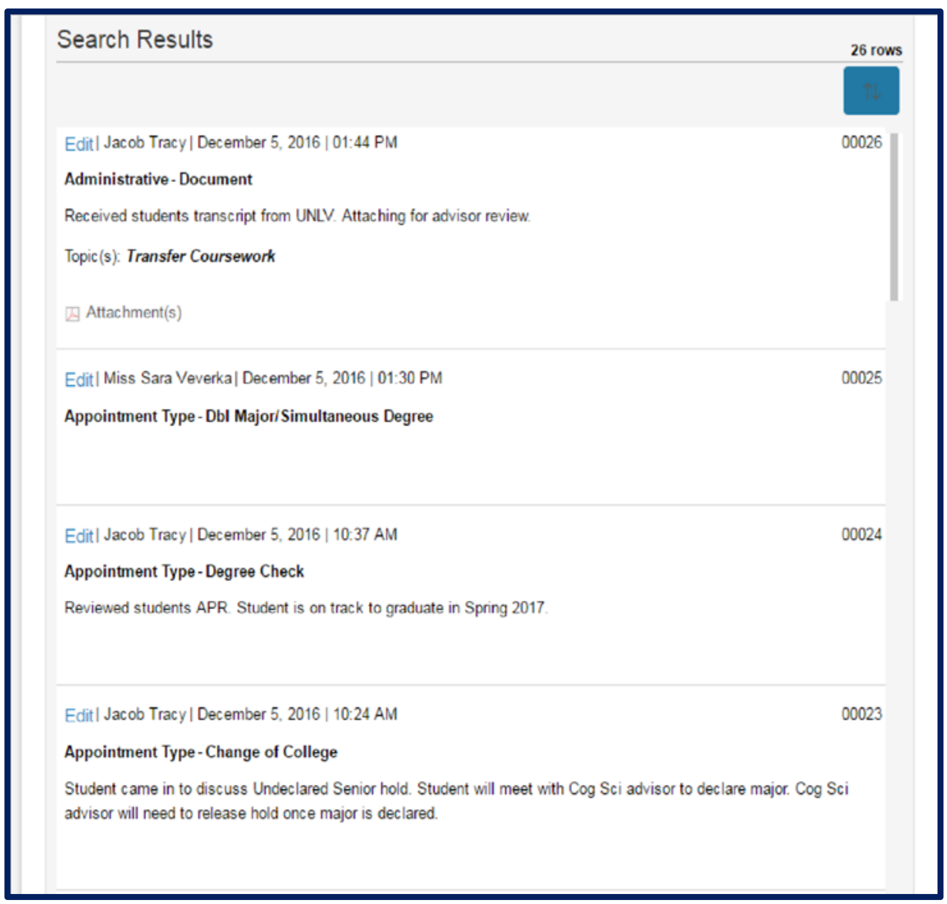
You may also delete a reminder that you have previously added.

Click **Save Note**

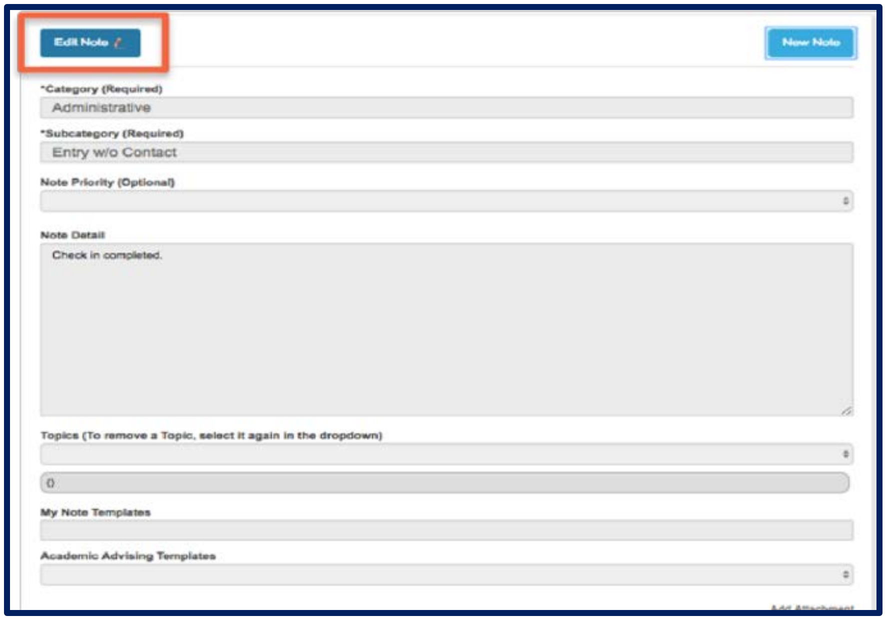


View Note History: You have access to all previously created notes in the Note History section of this page. Initially, notes will be ordered by date created.

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.



Editing a Note: Select Edit on a note in **Note History** and the **Edit Note** button will become active.

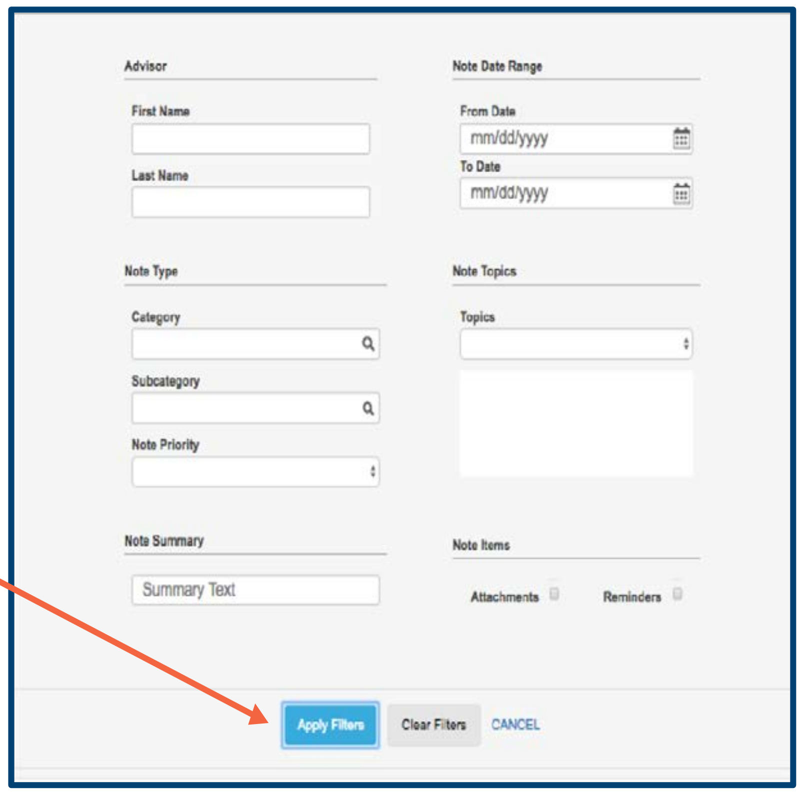


Note: You can only edit notes that you have created.

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

When finished, click **Save Note**.

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.

Support:

For questions or assistance, please contact SIS Production Support:

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

For additional SIS resources, please visit:

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