Creating an Advisor Note

This guide will cover:

- How to complete the process of creating an advisor note
- How to complete the process of adding action items and/or attachments to advisor notes

**Step One**

Navigate to the following breadcrumb:

OR

If beginning from within the Advisor Center, navigate to the My Advisees tab. The advisees assigned to the current user will display.

**Step Two**

Click the Advising Notes button associated with the student for which the note will be added for.
If the wrong advisee was selected, you can change the Advisee directly on this page. Once you are certain you have the correct advisee.

**Step Three**

Click the **Create a Note** button.
Step Four

Select the appropriate information in the “Group Box” section based on the drop down values. These selections will aid in filtering notes once they have been created:

- **Institution** will always be University of Cincinnati
- **Sub-categories** are tied to **Categories**. Once you select a Category, the Sub-category selections will become available if there are any that exist for the selected Category.
- Select a **status** of Open or Closed. It may be helpful to keep notes Open if you plan to add additional items to the note after it has been saved.
- Set the **Advisee Access** to “Yes” if you wish to make this note visible to the student.
- **Assigned To** should be used to ‘assign’ a note to another advisor in your department if you were meeting with one of their students while they were on vacation, sick, or out for another reason.

*Please do not use across departments at this juncture.*

- Enter a subject line.

Step Five

Insert the body of the note in the text box area. There is not a character limit for this field. This cannot be edited on this screen once a note has been submitted.
Step Six - Optional

Action items can be created to aid you in managing follow-up items. These are never visible to the student. To add an action item, click the Action Item button then complete the required fields in the Action Items section:

- Description – Enter a detailed description of the action item.
- Action Item Status – Select an available status for this action item.
- Due Date – Provide a date for which this item will need to be completed by.

Action items can be deleted at any time by clicking the delete button.

Step Seven - Optional

Attachments can be uploaded if any documents need to be attached along to a note item. These attachments would have to come directly from the user’s computer who is creating the note. To add an attachment, click the Add Attachment button then follow the prompts to open the document you wish to attach.

Step Eight

Once you are ready to complete the note, click the Submit button. A warning message will display indicating that this note item cannot be edited from this screen. Click the Yes button to continue.

NOTE: To edit a note item, please review the Editing a Note Item work instructions that are available in the Online Help section of the Catalyst training website.
Step Nine

The overall note and a note item will be created. From here you can notify the advisee of the note you created. You can also review and/or update the note by adding additional items. Click the Return button to navigate back to a view of all notes that have been entered for this particular student.

You have now completed the steps for creating an advisor note.