Managing and Reviewing Advisor Notes

This guide will cover:

- How to complete the process of filtering and sorting advisor notes
- How to complete the process of accessing and viewing a single advisor note
- How to complete the process of updating a note by creating additional note items, action items, and/or attachments

Filtering and Sorting Notes

Step One

Navigate to the following breadcrumb:

```
Main Menu > Campus Solutions > Self Service > Advisor Center > My Advisees
```

OR

If beginning from the Advisor Center, navigate to the My Advisees tab.

Step Two

From the My Advisees tab, click the My Advising Notes button. All notes will display for the advisees assigned to the current user.
Step Three

Review the existing notes using the filtering options. These filtering options are based on information that was entered when the note was created or updated. For example, you may only want to see notes that were placed in a specific category and/or sub-category. Or you may only want to see notes that include action items.

![Filter Notes](image)

Step Four

Once you have selected the desired filtering options, click the **Apply Filter** button.

Step Five

Column headings will allow you to sort the existing notes. For instance, you may want to sort based on the **Name** column.

![Advising Notes](image)

Step Six

Once you’re ready to access a note, simply click the **Advising Note** icon to review.

![Advising Note](image)

You have now completed the steps for filtering and sorting notes.
**Quickly Accessing a Single Note**

**Step One**

Navigate to the following breadcrumb:

![Breadcrumb Navigation](image)

OR

If beginning from the Advisor Center, navigate to the My Advisees tab.

**Step Two**

Click the **Advising Notes** icon associated with the advisee you’re managing. All existing notes will display for this particular advisee.
Step Three

From here you can create a new note by clicking the **Create a Note** button. To select an existing note to review and/or update, click the **Advising Note** icon next to the note you wish to view.

![Advising Note table]

Use this page to view notes about the selected student. You can see and edit all of the notes for the student, regardless of who created the note or who (if anyone) the primary assignee (contact person) is.

<table>
<thead>
<tr>
<th>Advising Note</th>
<th>Created By</th>
<th>Assigned To</th>
<th>Institution</th>
<th>Subject</th>
<th>Category</th>
<th>Subcategory</th>
<th>Note Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>LBJ James</td>
<td>Oscar Robertson</td>
<td>University of Cincinnati</td>
<td>1st Semester Check in ABS</td>
<td>Advising</td>
<td>Application</td>
<td>Open</td>
</tr>
<tr>
<td></td>
<td>LBJ James</td>
<td>Oscar Robertson</td>
<td>University of Cincinnati</td>
<td>CoC App</td>
<td>Advising</td>
<td>Application</td>
<td>Open</td>
</tr>
<tr>
<td></td>
<td>LBJ James</td>
<td>Oscar Robertson</td>
<td>University of Cincinnati</td>
<td>Starfish Communication</td>
<td>CEAS</td>
<td>Retention Tool</td>
<td>Open</td>
</tr>
<tr>
<td></td>
<td>LBJ James</td>
<td>Oscar Robertson</td>
<td>University of Cincinnati</td>
<td>interest in honors transition</td>
<td>University Honors</td>
<td>Academic Advising Session</td>
<td>Open</td>
</tr>
</tbody>
</table>

You have now completed the steps for quickly accessing a single note.
**Updating a Note (Creating additional note items, actions items, and/or attachments)**

**Step One**

Locate the note you wish to update and click the **Advising Note** icon.

**Step Two**

When viewing a single note, you can view all information in the note, including all note items, action items and attachments. To share a note with the student, click the **Notify Advisee** button. To update the note by adding note items, action items and/or attachments, click the **Update Note** button.
Step Three

When updating an existing note, you may select any values you may need to change in the *Update Note Information* section. Existing note items cannot be deleted or changed on this screen; however, you may use the *Add a New Note Item* section to create additional comments regarding this note.

Action Items and attachments could also be added or updated as necessary.

Step Four

Once you’ve completed all updates regarding this note, click the *Submit* button.

You have now completed the steps for updating an advisor note by adding additional comments, action items, and/or attachments.