

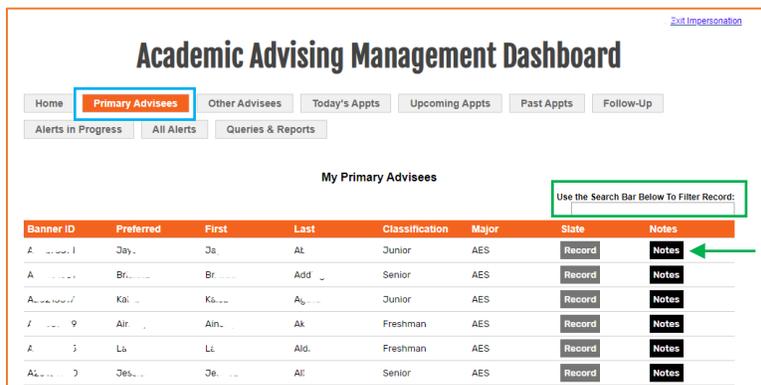
# Advising Notes Management

Link: [slate.okstate.edu/portal/advisor](http://slate.okstate.edu/portal/advisor)

## TAB: Primary Advisees

List of advisor’s primarily assigned students – default view is alphabetical order by last name

- Click on headings (Banner ID, Preferred, Last) to sort by these data points; click again to reverse sort
- Use the Search Bar to filter
- Click on “Notes” to enter notes and/or upload materials



## Screen: Academic Advising Notes Form: *Advising Notes* (internal to slate)

1. Choose a reason for the note from the menu
2. Add written notes as needed
3. Upload Materials based on type (if applicable)

OSU Student Success

Academic Advising Notes Form

Record: Jacob Testing (david.mariott@okstate.edu) Registrant Name or Email Address

First Name:

Last Name:

Email Address:

} This information is pre-populated based on the student selected from the dashboard

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**Advising Notes**

Please use the following section to provide any notes or documents to assign to the student's record. Anything you include in this section will **NOT** be visible to the student.

1. Note Reasons

- 4 Year Plan
- A&S Graduation Check
- Block Rate Exception
- Career Services
- CASNR Liaison Consultation
- CASNR SSC Consultation
- Change in Study Plan
- Controlled Electives
- Deficiency Letter
- Degree Sheet

2. Notes

3. Upload Advising Materials

No file chosen

} Up to 10 separate materials

Add Another Material

**Screen: Academic Advising Notes Form: *Advising Notes for Student Access*** (viewable to student on portal)

4. Add notes that the student can access via their student portal
5. Upload materials based on type which the student can access via their student portal (if applicable)
6. SELECT if you want to also email the notes to the student at this time

**Screen: Academic Advising Notes Form: *Advisor Follow Up***

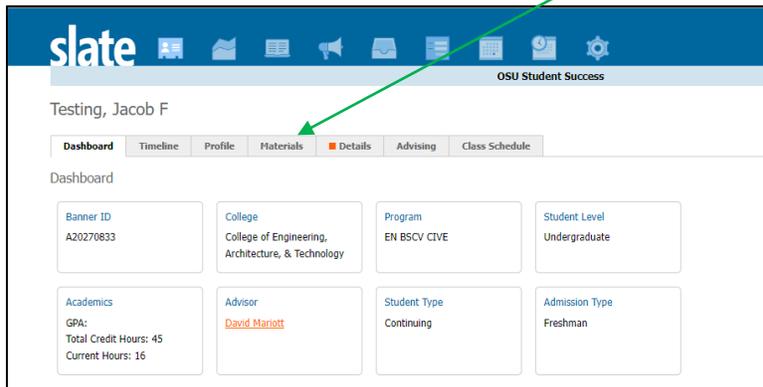
7. Choose Follow-Up status (Follow up needed or complete)
8. Choose Follow-Up date (if applicable)
9. Include follow up notes (as needed)
10. **SUBMIT**

**View Uploaded Materials:**

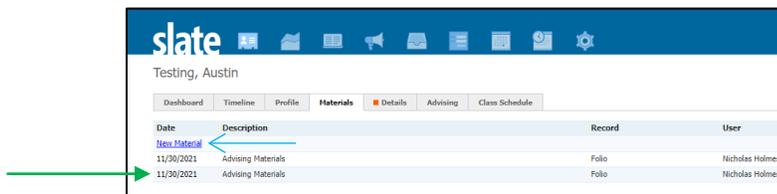
- From ANY Dashboard Tab with student records listed, click on “Student Record” to navigate to previously uploaded materials:

Banner ID	Preferred	First	Last	Classification	Major	Student Record	Advising Notes
A202004	Alzah	Alzah	Allgood	Freshman	UND	<a href="#">Student Record</a>	<a href="#">Notes</a>
A2020031	Camden	Camden	Baird	Freshman	UND	<a href="#">Student Record</a>	<a href="#">Notes</a>
A2020029	Carter	Joe	Barnard	Freshman	UND	<a href="#">Student Record</a>	<a href="#">Notes</a>
A2020091	Blake	Richard	Barthold	Freshman	UND	<a href="#">Student Record</a>	<a href="#">Notes</a>
A2020083	Taylor	Taylor	Carbaugh	Freshman	UND	<a href="#">Student Record</a>	<a href="#">Notes</a>

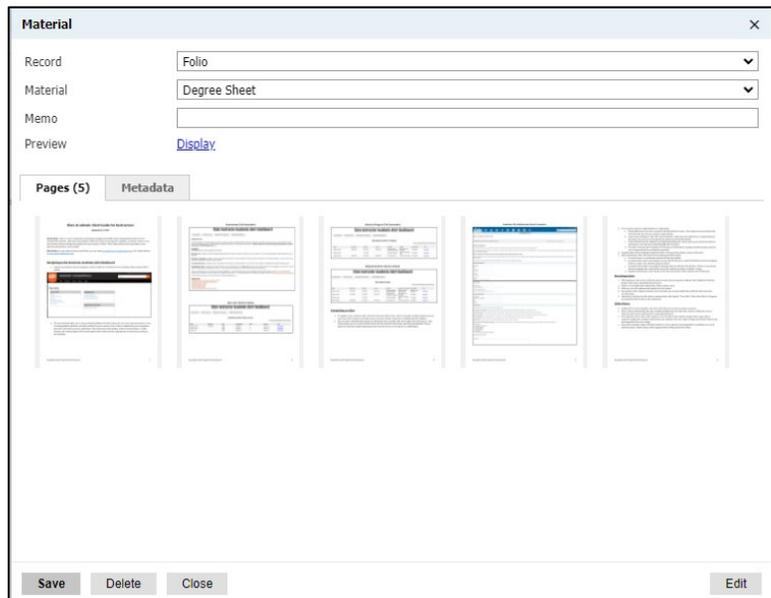
- Once in the student record on the slate database, choose the Materials tab:



- Uploaded Materials are ordered by date and have a description with the material category  
*\*New materials can be uploaded here on this screen as well*

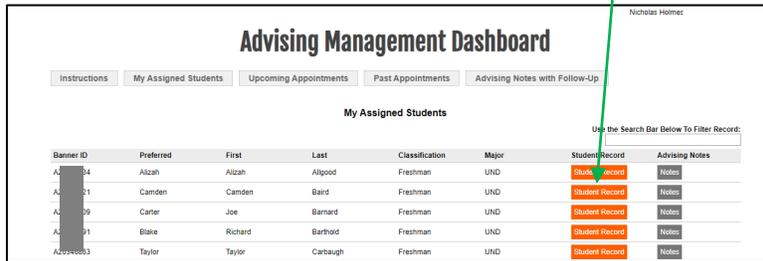


- Click on the line that contains the material you wish to review
  - To view the full-size document in a viewer mode:
    - Click on "Display"
    - OR**
    - Click on the thumbnail image of the material
  - Use the Save, Delete, Close, and Edit buttons to continue your navigation

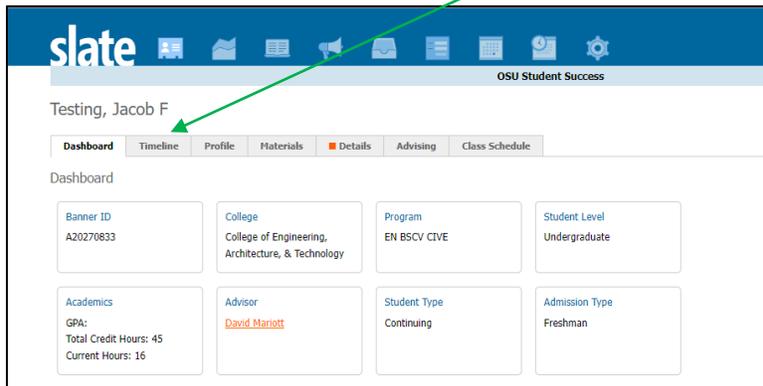


**View Previous Notes from Slate Dashboard:**

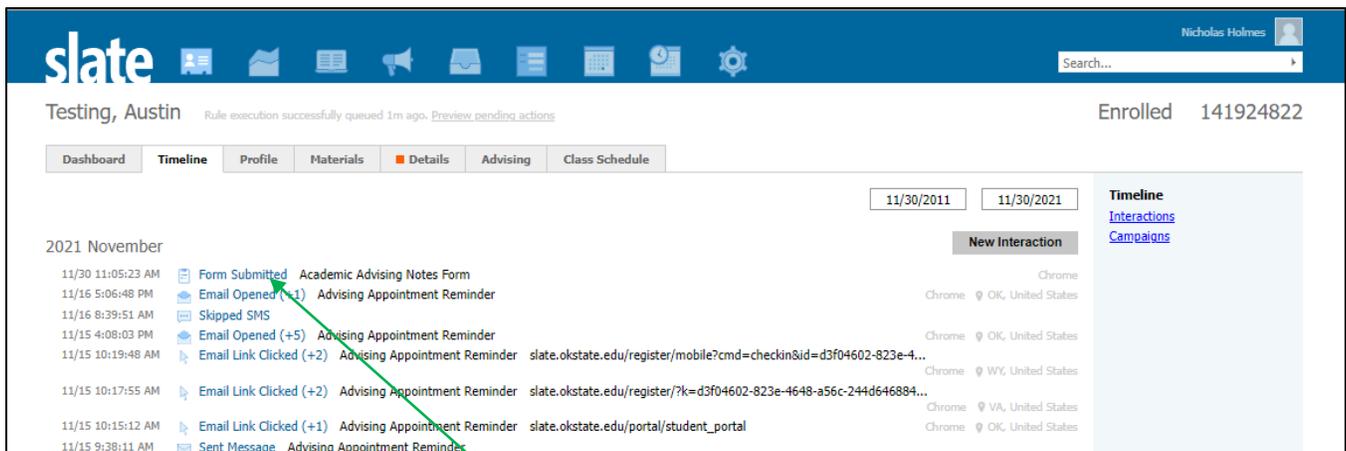
- From ANY Dashboard tab with student records listed, click on “Student Record” to navigate to previously recorded notes:



- Once in the student record on the slate database, choose the Timeline tab:



- The timeline records all interactions in chronological order
  - Advising Notes are stored as the interaction type “Form Submitted”



- Click on the blue linked “Form Submitted” for the date in question to view the note

- A new window opens as a pop-up with the many details recorded within the note
  - There are sections for the Advising Notes portion, the Advising Notes for Student Access section, as well as the Advisor Follow-Up section
  - Use the scroll bar on the right to navigate to the additional information
- Use the Return, Display (opens a new tab with ALL information visible), Edit, Cancel Registration, and Export PDF buttons to continue your navigation

**Display Response**

Registrant: [Testing, Jacob F](#)  
 Form: [Academic Advising Notes Form](#)  
 Submitted: 12/29/2021 at 02:26:39 PM by [David Mariott](#)  
 Last Updated: 12/29/2021 at 02:26:39 PM  
 Created: 12/29/2021 at 02:26:39 PM  
 Status: Registered  
 Referrer: <https://slate.okstate.edu/manage/form/form?id=5eeddefc-7d3d-4105-9ffd-74a7e955a02d>  
 IP Address: 74.195.253.26  
 User Agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/96.0.4664.110 Safari/537.36

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First Name: Jacob  
 Last Name: Testing  
 Email Address: david.mariott@okstate.edu

**Advising Notes**

Please use the following section to provide any notes or documents to assign to the student's record. Anything you include in this section will **NOT** be visible to the student.

Note Reasons

Notes

Add Another Material

**Advising Notes for Student Access**

Return Display Edit Cancel Registration Export PDF

Use the scroll bar to access additional information



**Advising Notes for Student Access**

Please use the following section to provide any notes or documents for your student that you would like for them to access via their student portal. Anything you include will be visible to the student.

Student Notes: test 12/29/2021

Add Another Material

**Advisor Follow-Up**

This section is optional and will allow you to flag your advising notes for any future follow-up. Your notes and follow-up-date will be available in your advising portal for you to reference.

Form Status: Follow-Up Needed

Follow Up Date (MM/DD/YYYY)

Follow Up Notes

Return Display Edit Cancel Registration Export PDF