**Advising Notes Management**

*Link: 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)

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This information is pre-populated based on the student selected from the dashboard.
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 of you want to also email the notes to the student at this time

![Advising Notes for Student Access Screen]

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

![Advisor Follow Up Screen]

View Uploaded Materials:

- From ANY Dashboard Tab with student records listed, click on “Student Record” to navigate to previously uploaded materials:
• Once in the student record on the slate database, choose the Materials tab:

![Slate Database Interface](image1)

• 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*

![Slate Database Interface](image2)

• 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

![Viewer Mode](image3)
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
  o There are sections for the Advising Notes portion, the Advising Notes for Student Access section, as well as the Advisor Follow-Up section
  o 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