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 <u>"Notes</u>" to enter notes and/or upload materials

	Aca	demic A	dvising	Managem	ent Da	shboard	. Exit Impersonation
Home Alerts in Pro	Primary Advisees gress All Ale	Other Advis	sees Today's s & Reports	Appts Upcoming	Appts P	ast Appts Foll	low-Up
			My P	rimary Advisees			
						Use the Search	Bar Below To Filter Record:
Banner ID	Preferred	First	Last	Classification	Major	Use the Search Slate	Bar Below To Filter Record: Notes
Banner ID	Preferred Jay.	First Ja	Last At	Classification Junior	Major AES	Use the Search Slate Record	Bar Below To Filter Record: Notes Notes
Banner ID A	Preferred Jay. Bri	First Ja Br	Last AL Add' _	Classification Junior Senior	Major AES AES	Use the Search Slate Record Record	Bar Below To Filter Record: Notes Notes Notes
Banner ID A A A	Preferred Jay. Br Kai	First Ja, Br K6	Last At Add' Atg	Classification Junior Senior Junior	Major AES AES AES	Use the Search Slate Record Record Record	Bar Below To Filter Record: Notes Notes Notes Notes
Banner ID A	Preferred Jay. Br Kai _ Air.	First Ja, Br Kö Ain.	Last At Add J Ag Ak	Classification Junior Senior Junior Freshman	Major AES AES AES AES	Use the Search Slate Record Record Record Record	Bar Below To Filter Record: Notes Notes Notes Notes Notes
Banner ID A	Preferred Jay. Br Kai _ Air. , La	First Da, Br Ka Ain La	Last At Addi J Alganna Ak Ald.	Classification Junior Senior Junior Freshman Freshman	Major AES AES AES AES AES AES	Use the Search Slate Record Record Record Record Record Record	Bar Below To Filter Record: Notes Notes Notes Notes Notes Notes

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@d	rkstate.edu)	Registrant Name or Email Address
First Name Jacob Last Name Testing Email Address david.mariott@okstate.edu Advising Notes	This information is pre-po based on the student sele from the dashboard	pulated cted
Please use the following section to provide Note Reasons 4 Year Plan A&S Graduation Check Block Rate Exception Career Services CASINE Lision Consultation CASINE Siston Consultation Change in Study Plan Controlled Electives Deficiency Letter Degree Sheet	any notes or documents to assign to the student's record. Anything you include in	this section will $\underline{\texttt{NOT}}$ be visible to the student.
Notes		
Upload Advising Materials Choose File No file chosen Add Another Material	p to 10 separate materials	

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
	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 in this section will be visible to the student.
4.	Student Notes
5	Upload Advising Material for Student Access
э.	Choose File No file chosen Up to 10 separate materials
	Add Another Material
6.	Would you like to email this student with a copy of your student notes?

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
	This section is optional and will allow you to flag your advising notes for any future follow-up. Your notes and follow-update will be available in your advising portal for you to reference.
7	Form Status Follow-Up Needed
8	Follow Up Date (MM/DD/YYYY)
9	Follow Up Notes
_	
	С
10	
_	Submit Cancel

View Uploaded Materials:

• From ANY Dashboard Tab with student records listed, click on "Student Record" to navigate to previously uploaded materials:

						Ni	cholas Holmes
		Advis	sing Mana	gement D	ashboar	d	
Instructions	My Assigned Students	Upcomin	g Appointments	Past Appointments	Advising Notes	with Follow-Up	
			My As	signed Students		Use the Searc	ch Bar Below To Filter Record
Banner ID	Preferred	First	My As: Last	Classification	Major	Use the Searc	ch Bar Below To Filter Record
Banner ID A.	Preferred	First Alizah	My Ast Last Aligood	Classification	Major	Ure the Search Studen, Record Stud Record	ch Bar Below To Filter Recorr Advising Notes Notes
Banner ID Al 34 Al 21	Preferred Alizah Camden	First Alizah Camden	My As: Last Aligood Baird	Classification Freshman Freshman	Major UND UND	Ure the Search Student Record Stud Record Student Record	Advising Notes Notes Notes
Banner ID A. 34 A. 21 A. 19	Preferred Alizah Camden Carter	First Alizah Camden Joe	My Ass Last Aligood Baird Barnard	Classification Freshman Freshman Freshman	Major UND UND UND	U e the Searc Studen Record Student Record Student Record Student Record	Advising Notes Notes Notes Notes Notes
Banner ID AC 94 AC 21 AC 99 AC 91	Preferred Alizah Camden Carter Biake	First Alizah Camden Joe Richard	My Ass Last Aligood Baird Barmard Barthoid	Classification Classification Freshman Freshman Freshman Freshman Freshman	Major UND UND UND UND	U e the Searc Studen Record Studen Record Student Record Student Record Student Record	ch Bar Below To Filter Record Advising Notes Notes Notes Notes Notes

• Once in the student record on the slate database, choose the <u>Materials</u> tab:



• <u>Uploaded Materials</u> are ordered by date and have a description with the material category *<u>New materials</u> can be uploaded here on this screen as well

S	late			-			9	¢.	
Te	esting, Aus	tin							
	Dashboard	Timeline Profi	ile Materials	Details	Advising	Class Schedu	le		
De	ate	Description						Record	User
Ne	ew Material <	Advision Materials	-					False	Nickeles Meles
11	1/30/2021	Auvising Platenais						Pollo	Nicholas Holmes

- 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

al Degree Sheet	lecord		Folio			
	laterial		Degree Sheet			
W DISDRY	lemo					
	review		<u>Display</u>			
	Pages (5)	Metadata				
	Not it almost the of	and to be write	MANUFACTURE AND	Restauries and the failure		
		DIVERSION-	Hereitania Hereitania Hereitania Hereitania	HIII BEFF		
		-	The	Normali canto de la dega		England
			Be to be the beauty of the balance			 A second s
	And particular to an and an An and an an an and an an and an		D - I E I B B	· Superior and an and a superior superior superior		 • Second Second Party and the second sec
				Annual sector and a sector and	New York	 Internet and a second se

View Previous Notes from Slate Dashboard:

 From ANY Dashboard tab with student records listed, click on <u>"Student Record</u>" to navigate to previously recorded notes:

		Advisi	ng Man	agement D	ashboar	ď	holas Holmes
Instructions	My Assigned Students	Upcoming A	ppointments	Past Appointments	Advising Notes	with Follow-Up	
			My	Assigned Students			
						Use the Searc	h Bar Below To Filter Recor
Banner ID	Preferred	First	Last	Classification	Major	Student Record	Advising Notes
A 84	Alizah	Alizah	Aligood	Freshman	UND	Stude decord	Notes
A2 21	Camden	Camden	Baird	Freshman	UND	Student Record	Notes
A2 09	Carter	Joe	Barnard	Freshman	UND	Student Record	Notes
				E	100	Student Decord	Maten
A. 91	Blake	Richard	Barthold	Freshman	OND	Charlene reactive	NOUES

• Once in the student record on the slate database, choose the <u>Timeline</u> tab:

	OSU St	udent Success
Profile Materials Detail	s Advising Class Schedule	
College	Program	Student Level
College of Engineering,	EN BSCV CIVE	Undergraduate
Architecture, & Technology		
Advisor	Chudant Tura	
1 PR 1 PR 1 PR 1	SUDPOL IVOP	Admission Lype
	rofile Haterials Detail College College of Engineering, Architecture, & Technology	rofile Haterials Details Advising Class Schedule College College of Engineering, Architecture, & Technology

- 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 <u>Advising Notes</u> portion, the <u>Advising Notes for Student Access</u> section, as well as the <u>Advisor Follow-Up</u> 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	Canternations (Sech. Section A1017001)	×	: ,
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		Use the scro
Referrer	https://slate.okstate.edu/manage/form/form?id=5eeddefc-7d3d-4105-9ffd-74a7e955a0) <u>2d</u>	
IP Address	74.195.253.26		bar to access
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		additional
First Name	Jacob		information
Last Name	Testing		
Email Address	david.mariott@okstate.edu		3
Advising Notes			e
Please use the followi section will <u>NOT</u> be v	ing section to provide any notes or documents to assign to the student's record. Anything you isible to the student.	i include in this	
Note Reasons			
Notes			
Add Another Material			7
Advising Notes for	Student Access		↓] ★
Return Disp	lay Edit Cancel Registration	Export PDF	
Advising Notes for §	Student Access		
Please use the followir student portal. Anythi	ng section to provide any notes or documents for your student that you would like for them to ing you include will be visible to the student.	o 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		1
This section is optional a available in your advising	nd will allow you to flag your advising notes for any future follow-up. Your notes and follow-update will be portal for you to reference.	
This section is optional a available in your advising Form Status	nd will allow you to flag your advising notes for any future follow-up. Your notes and follow-update will be portal for you to reference. Follow-Up Needed	1
This section is optional a available in your advising Form Status Follow Up Date (MM/DD/YYYY)	nd will allow you to flag your advising notes for any future follow-up. Your notes and follow-update will be portal for you to reference. Follow-Up Needed	l