Advising Notes Management

Link: slate.okstate.edu/portal/advisor

TAB: Assigned Students

List of advisor’s 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 “Submit Advising Notes” to enter notes and/or upload materials

![Academic Advising Management Dashboard](image)

Screen: Academic Advising Notes Form: Advising Notes

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

![Academic Advising Notes Form](image)

- This information is pre-populated based on the student selected from the dashboard
Screen: Academic Advising Notes Form: **Advising Notes for Student Access**

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)

```
<table>
<thead>
<tr>
<th>Advising Notes for Student Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
<tr>
<td>Student Notes</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Uploaded Advising Material for Student Access</td>
</tr>
<tr>
<td>Choose File</td>
</tr>
<tr>
<td>Add Another Material</td>
</tr>
</tbody>
</table>
```

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

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

```
<table>
<thead>
<tr>
<th>Advisor Follow-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>This section is optional and will allow you to flag your advising notes for any future follow-up. Your notes and follow-up will be available in your advising portal for you to reference.</td>
</tr>
<tr>
<td>Follow-Up Status</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Follow-Up Date (MM/DD/YYYY)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Follow Up Notes</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
```

View Uploaded Materials:

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

```
<table>
<thead>
<tr>
<th>Advising Management Dashboard</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
```

Updated 01.10.2022
• 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 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