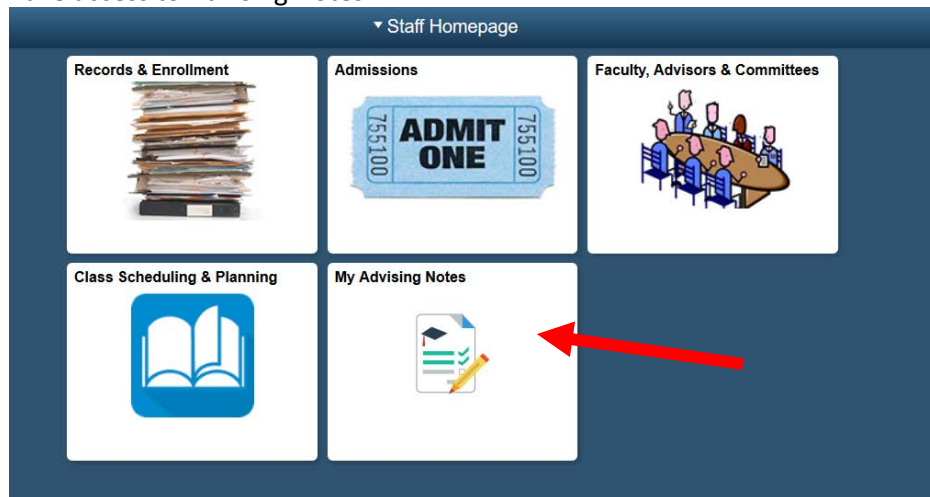


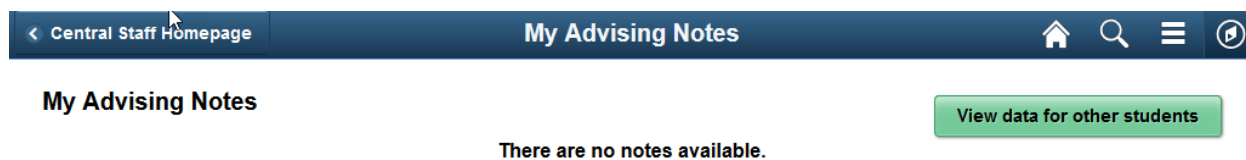
# How to Use Advising Notes

## Where it is, What it Looks Like

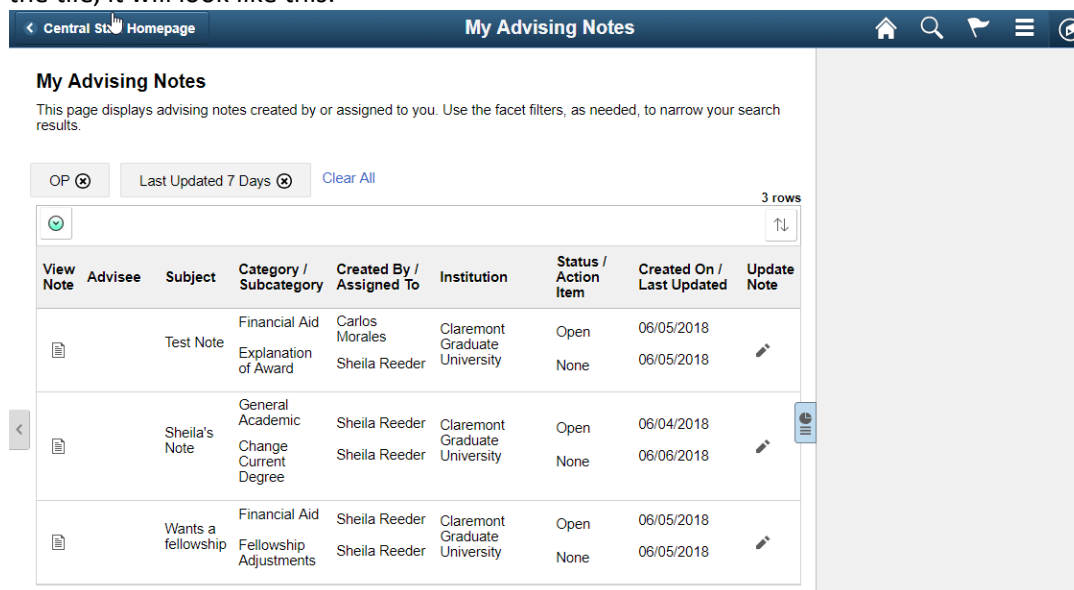
From the Staff Homepage, select the “My Advising Notes” tile. All program and student services staff have access to Advising Notes.



Before you have Advising Notes recorded or before an Advising Note has been assigned to you, the screen will look like this after you click into the tile:



Once you have created your first Advising Note or have had a note assigned to you, when you go into the tile, it will look like this:



# How to Use Advising Notes

## Create an Advising Note

If you have a new interaction with a student and want to document it in an Advising Note, click on the Related Content icon on the right side of the screen to reveal the hidden menu (click the icon shown in image #1 below). Once you click the icon, two hidden menus will appear on the right-hand side.

In the Advising Notes menu, click on the two small squares (#2 below) to open the page and create your note.

**My Advising Notes**

This page displays advising notes created by or assigned to you. Use the facet filter results.

OP (x) Last Updated 7 Days (x) Clear All

View Note	Advisee	Subject	Category / Subcategory	Created By / Assigned To	Institution
		Test Note	Financial Aid Explanation of Award	Carlos Morales Sheila Reeder	Claremont Graduate University
		Sheila's Note	General Academic Change Current Degree	Sheila Reeder Sheila Reeder	Claremont Graduate University
		Wants a fellowship	Financial Aid Fellowship Adjustments	Sheila Reeder Sheila Reeder	Claremont Graduate University

**Related Information #2**

**Advising Notes**

Enter any information you have and click Search. Leave fields blank for a list of all values.

When the new page opens, click on Add a New Value.

**Advising Notes**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

**Search Criteria**

Academic Institution begins with CGRAD

ID begins with

Advisee Last Name begins with

Advisee First Name begins with

Academic Advisor begins with

Created By begins with

Note Category begins with

Note Subcategory begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

# How to Use Advising Notes

To select your student, you can either enter the student ID number (#1 below) or click on the magnifying glass and search by student name (#2 below).

**Advising Notes** Look Up ID

Find an Existing Value    Add a New Value

Academic Institution   #1

ID   #2

Look Up    Clear    Cancel    Basic Lookup

Once you have selected your student, select the category for your note. Not every user will have access to all of the note categories.

Central Staff Homepage    My Advising Notes

Advising Notes

Academic Institution CGRAD    Claremont Graduate University

Note ID 99999

\*Category

- \*Subcategory
- \*Status Academic Milestones
- \*Subject Career Development
- Financial Aid
- General Academic
- International
- Retention
- Student Accounts
- Student Life
- Student Status

\*Assigned To

\*Advisee Access No

Contact Type

Find | View All    First 1 of 1 Last

Add Action Item

Attachments    Audit

Attached File	Description

Add Attachment

Send Notification

Save    Notify    Add    Update/Display

## How to Use Advising Notes

Each note category has pre-defined subcategories to help you further define the reason for your note. These categories and sub-categories will be used for reporting purposes, so while they may not be perfect, please attempt to be as precise as possible when selecting them. You may enter a note for any category for which you have access (E.g., a department staff member may enter a note under category FINAID (Financial Aid) and subcategory RA/TA (RA/TA Award) – rather than that category being only limited to use by the Financial Aid office).

NOTE: A list of the current Categories and Subcategories available as of January 2020 is attached to the end of this guide.

Other fields to enter:

**Status:** The status of the note is automatically “open.” If no further follow-up is needed on this note, you can complete it and then change the status to “closed.” If follow-up is needed, leave the status “open” and change it to “closed” later.

**Subject:** This is a required field. This can be anything that is useful to you to briefly state what the note is referring to. SUGGESTION: Start out the subject by entering the Year and Term (E.g., 2021 Fall ) to provide yourself with an easy way to sort your notes. A full example may be “2021 Fall – APSA conference travel grant”

**Advisee Access:** This field has been restricted/grayed out on your screen; students will not have access to see/update these notes.

**Contact Type:** This is an optional field that can be used to select the type of interaction you had with the student (phone call, email, office visit, etc.).

## How to Use Advising Notes

To create the detailed contents of the note, select the “edit” link:

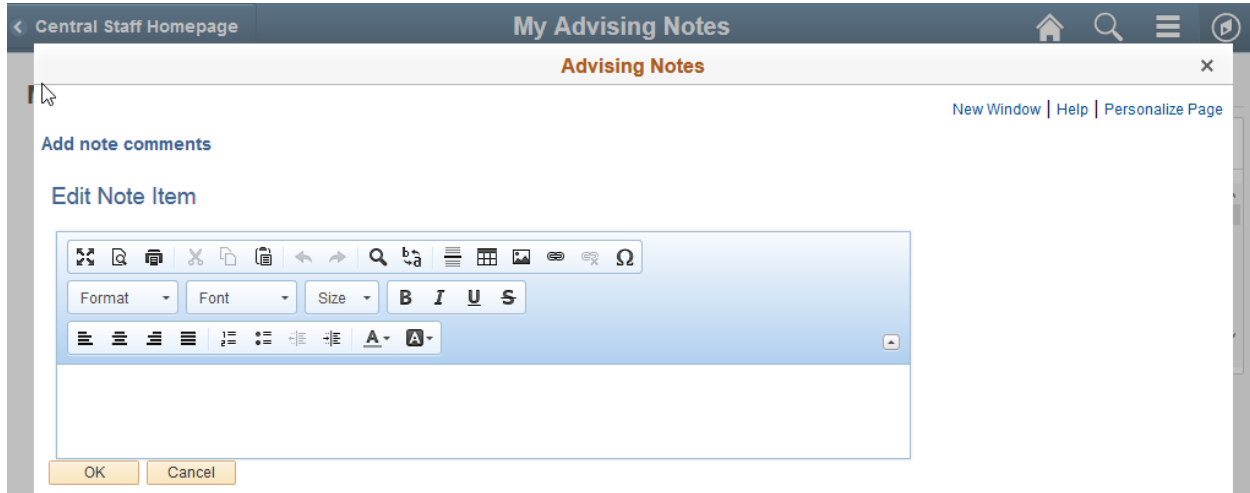
The screenshot shows a web interface for managing advising notes. At the top, there are dropdown menus for '\*Status' (set to 'Open') and 'Contact Type'. Below these is a text input field for '\*Subject'. A table titled 'Note Items' contains one row with columns for 'Note Item' (1) and 'Created'. To the right of the table are navigation links: 'Find | View All', 'First', '1 of 1', and 'Last'. Below the table is a 'Comment' text area. To the right of the comment area is a blue 'Edit' button, which is highlighted with a red rectangular box. At the bottom right of the interface is a yellow 'Add Action Item' button.

This will open up a new window where you can write your note. When you finished, click OK.

### What should you enter in the note comments?

- Notes are available for all staff to see. So anything that would be considered confidential or FERPA violations should not be recorded! (Example, if a student self-discloses a disability to you, do not enter that “Sally Student informed me she has ADHD and will be requesting accommodations through ODS” because you could inadvertently disclose her disability status to other staff members without her permission.
- Note comments are not required. If you had an interaction with a student and simply want to record the interaction, you don’t need to enter a comment at all – just the category, subcategory, status, and subject. Notes can be as involved or as simple as you want them to be.
- Each recorded student/staff interaction should be entered as a single note. Make your best effort to limit the content of the note to one area, and enter multiple notes if needed for the same student. Why? Because when searching through the list of existing notes it is MUCH easier to track volume and repeat advising if all the interactions are grouped together. So if you have a conversation with a student about two issues (Ex., a possible degree change and also a possible leave of absence), enter one note for one category and a second note for the second category. You can copy/paste the note comments as needed.
- Open status means that there is work to be done for this particular situation. If status is closed, the assumption is that nothing further is needed.
- As employees we speak with students all the time – not every interaction may need to be entered! A good rule of thumb is to enter an advising note for
  - situations that are unusual in some way
  - for communication efforts that are meant to be tracked (Ex., will a new student attend orientation?)
  - a reason that requires information to be available to multiple offices

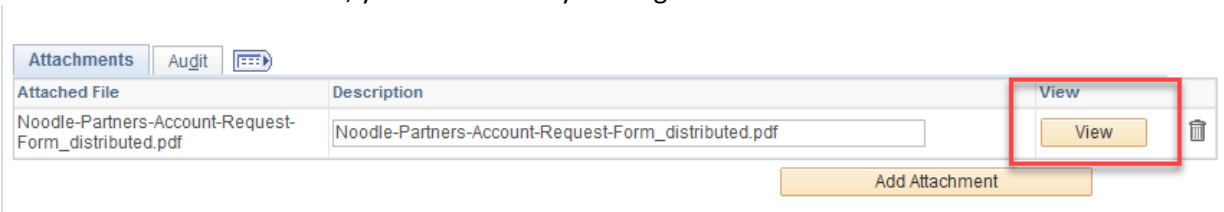
## How to Use Advising Notes



You can also add an attachment by clicking “Add attachment.”



After the attachment is added, you can view it by clicking the “View” button.



Don't forget to click “Save” at the bottom! Then click the X in the top right corner to go back.

The next time you go into the tile, you will see all of the notes you have created, as well as any that are assigned to you. You can use the left menu to filter your notes (by category or sub-category, etc.). Or you can click on the Related Content button to open up the right side Advising Notes menu and create a new note whenever you need to.

## How to Use Advising Notes

**My Advising Notes**

This page displays advising notes created by or assigned to you. Use the facet filters to narrow your search results.

OP (x) Last Updated 7 Days (x) Clear All

View Note	Advisee	Subject	Category / Subcategory	Created By / Assigned To	Institution
		Test Note	Financial Aid Explanation of Award	Carlos Morales Sheila Reeder	Claremont Graduate University
		Sheila's Note	General Academic Change Current Degree	Sheila Reeder Sheila Reeder	Claremont Graduate University
		Wants a fellowship	Financial Aid Fellowship Adjustments	Sheila Reeder Sheila Reeder	Claremont Graduate University

**Related Information**

**Advising Notes**

Enter any information you have and click Search. Leave fields blank for a list of all values.

### Find Advising Notes You Have Entered

You can use the filters in the Advising Notes page to find any open notes, or any notes that were created within a specific date range, etc. To open the note, simply click on the “View Note” icon.

**My Advising Notes**

This page displays advising notes created by or assigned to you. Use the facet filters, as needed, to narrow your search results.

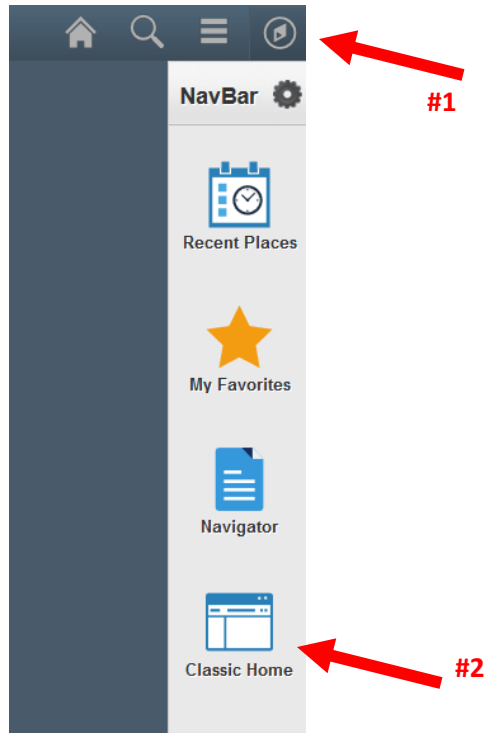
OP (x) Last Updated 7 Days (x) Clear All

View Note	Advisee	Subject	Category / Subcategory	Contact Type	Created By / Assigned To	Institution	Status / Action Item
		Fail 2019 - student not attending classes	Retention Email to Student	Email	Lindsay Stadler Lindsay Stadler	Claremont Graduate University	Open None

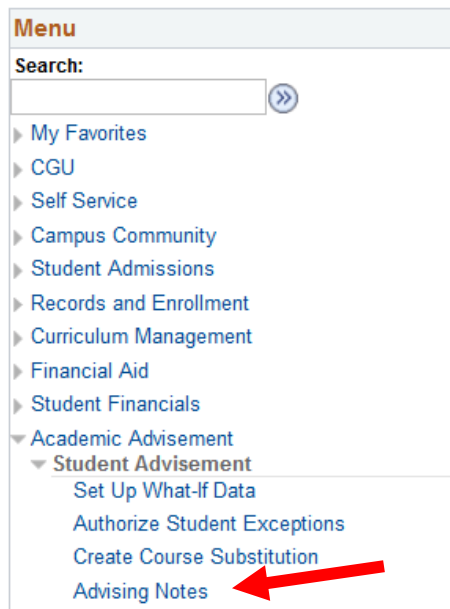
### Editing Existing Advising Notes

Unfortunately, at this time Oracle has not released the ability to edit an existing advising note through the fluid PeopleSoft interface (through clicking on the “tiles”), so you will have to edit notes using the Classic Home view. To get to that view, click the compass icon in the upper right-hand corner of the home screen (#1), then select the Classic Home icon (#2).

## How to Use Advising Notes



From the Classic Home menu, click Academic Advisement > Student Advisement > Advising Notes. Recall that the items available on each person's menu will be different because they are based on the security roles assigned to their campus position by OIT.



In Advising Notes, you can search by the student's ID or name in the Search Criteria. To find only the notes that you have entered, leave field blank other than entering your PeopleSoft userID into the "Created By" field and click search



# How to Use Advising Notes

## Advising Notes

Enter any information you have and click Search. Leave fields blank for a

▼ **Search Criteria**

Academic Institution  begins with

ID  begins with

Advising Note ID  begins with

Last Name  begins with

First Name  begins with

Academic Advisor  begins with

Case Sensitive

Created By  begins with  STADLERL

Note Category  begins with

Note Subcategory  begins with

Once you select the note you want to edit, simply click the blue edit link in the Comment section, or adjust the information in the fields or the attachments, and click Save at the bottom. You can also change the status from Open to Closed through this same process.

**Advising Note**

\*Category  Lindsay Stadler

\*Subcategory

\*Status

\*Advisee Access

Contact Type

\*Subject

**Note Items** Find | View All First 1 of 1 Last

Note Item	1	Created	09/25/2019 9:09:15AM	<input type="button" value="+"/>	<input type="button" value="-"/>
<b>Comment</b>	Student contacted to inform a registration change was needed b/c was in unit-bearing and doctoral study in the same term. Student said (in email 9/24 to LS) that the ECON 450 class should be audit basis. Reg Office did retroactive change to ECON 450 grading basis to end of add/drop period.				<a href="#">Edit</a>

## Helpful Queries

SR\_ADVISING\_NOTES – to show all advising notes entered. Helpful to run queries and sort by category or subcategory, or to find all notes that begin with a specific term in the subject line.

SR\_ADVISING\_NOTES\_CREATED\_BY – to show all advising notes entered by a specific individual. Helpful to check on the status of your own notes; requires you to enter your PeopleSoft username in the prompt.

## How to Use Advising Notes

Rev 1/2020

### Current (January 2020) Categories and Subcategories

CATEGORY	SUBCATEGORY	DESCRIPTION	CATEGORY	SUBCATEGORY	DESCRIPTION
ACADEMIC	ADVISOR	Advisor Change	INTERNATNL	OPT	OPT
ACADEMIC	CHGCLASS	Change to Registration	INTERNATNL	RDUC_CRSLD	Reduced Courseload
ACADEMIC	CHGCONCENT	Change/Add Conctrtn	INTERNATNL	SEVIS_EXT	SEVIS Extension
ACADEMIC	CHGDEGREE	Change Curr. Degree	INTERNATNL	SEVIS_OUT	SEVIS Transfer Out
ACADEMIC	COURSEWORK	Coursework Progress	INTERNATNL	SEVIS_REIN	SEVIS Resinstatement
ACADEMIC	CROSSREG	Cross Registration	INTERNATNL	Status	Student Status Concerns
ACADEMIC	EXTENSION	Extension of Time	INTERNATNL	STEM_OPT	STEM OPT
ACADEMIC	PETITION	Petition /Policy Excptn	INTERNATNL	VISA	Visa
ACADEMIC	TRANSCREDIT	Transfer Credit	MILESTONES	COMMITTEE	Committee Participation
ACADEMIC	TRANSCRIPT	Transcript Request	MILESTONES	PROGRESS	Dissertation/Thesis Progress
ADVISING	2019-2020	2019-2020 Acad Year	MILESTONES	QUALEXAMS	Qualifying Exams
ADVISING	2020-2021	2020-2021 Acad Year	MILESTONES	SUBMISSION	Diss./Thesis Submission
ADVISING	2021-2022	2021-2022 Acad Year	MILESTONES	TOPIC	Dissertation/Thesis Topic
CAREERDEV	CONFERENCE	Conference Attendnc.	RETENTION	CALL	Call to Student
CAREERDEV	COUNSELING	Career Counseling	RETENTION	EMAIL	Email to Student
CAREERDEV	INTERNPRC	Internship/Practicum	RETENTION	FACCONTACT	Faculty Contact
CAREERDEV	PUBLICATNS	Publications	RETENTION	INPERSON	In Person Contact
CAREERDEV	REFLETTER	Letters of Reference	RETENTION	RETEVENT	Retention Event
CAREERDEV	RESEARCH	Research Awards	STDNTACCTS	EXPLANATN	Explanation of Charges
FINAID	ENTRANCE	Entrance Counseling	STDNTACCTS	PAYCONFIRM	Payment Confirmation
FINAID	EXITCOUNSL	Exit Counseling	STDNTACCTS	PAYCONTRCT	Payment Contract
FINAID	EXPLANATN	Explanation of Award	STDNTACCTS	REFUND	Stu. Refund Disbursement
FINAID	FELLOWSHIP	Fellowship Adjustment	STDNTACCTS	TPP	Sponsors/Third Party Paymnt
FINAID	RA/TA	RA/TA Award	STDNTLIFE	CLUB	Club Interests
FINAID	REPAYMENT	Deferment/Repayment	STDNTLIFE	CONCERNS	Acad/Professor Concerns
FINAID	REQLOANDEC	Req. Loan Decrease	STDNTLIFE	EVENTS	Events
FINAID	REQLOANINC	Request Loan Increase	STDNTLIFE	GSC	Graduate Student Council
FINAID	VETERAN	Veteran's Benefits	STDNTLIFE	HLTHINS	Health Insurance
FINAID	WORKSTUDY	Work Study	STDNTLIFE	PERSONAL	Personal Concerns
INTERNATNL	CHGLEVEL	Change of Educ. Level	STDNTLIFE	REFERRAL	Resource Referral
INTERNATNL	CPT	CPT	STDNTSTAT	ACADPRBTN	Academic Probation
INTERNATNL	DEPENDENTS	Dependents	STDNTSTAT	LATEREG	Late Reg. after withdrw
INTERNATNL	EMPLOYMENT	Employment	STDNTSTAT	LEAVE	Leave of Absence
INTERNATNL	I-20	I-20	STDNTSTAT	PRIVACY	FERPA/Student Privacy
INTERNATNL	J1_TRAIN	J1 Practical Training	STDNTSTAT	REINSTATE	Reinstatement/Readmissions
INTERNATNL	LEAVEABSEN	Leave of Absence	STDNTSTAT	WITHDRAWAL	Withdrawal from University
INTERNATNL	NEWCHECKIN	New Student Check-In			