Advising Notes in PeopleSoft

Adding an Advising Note

1. Navigate to Self Service > Advisor Center > My Advisees



2. Click on the Advising Notes icon next to the student for whom you wish to add a note.

Find 🗖 🛗							
	View Student Details	Advising Notes					
12	View Student Details						
07	View Student Details						

3. Click on the "create a note" button to add an Advising Note.

Faculty	Center	Advisor Center		Search
my advisees	student center	general info	transfer credit	academics
Advising Not	es			
Test Student	3			
*Change Advisee	Student 3,Test		✓ chang	e
Use this page to view who created the note	r notes about the selected s : or who (if anyone) the prin	tudent. You can see and nary assignee (contact p	edit all of the notes for erson) is.	the student, regardless
create a note				
i There are for an ind	no notes. Click the Cre ividual.	ate Note button if y	ou would like to add	l a note

4. Select "University of Pittsburgh" for the Institution and the appropriate Category and Subcategory. Leave the Status as "Open" and the Advisee Access to "No" (advisees cannot view Advising Notes at this time).

*Institution	University of Pittsburgh	~			
*Category	Course Enrollment	~	*Status	Open	~
*Subcategory	Class Schedule	~	*Advisee Access	No	~

5. Create a meaningful title for the Subject field and type your notes in the text box.

NOTE: Please be aware of what you type for Advising Notes, as it is considered part of the student's educational record and can be subject to a review by the student under FERPA.



6. If you wish to set an action item for yourself, click on the "add action item" button and enter the Description, Action Item Status, and Due Date.

Action	n Items	Personalize Fin	Personalize Find View All 🗖 🛗				
Action Item	Entered On	*Description	*Action Item Status	*Due Date			
1	07/22/2016	Make sure Suzie has registered for 2016 Fall	Incomplete 🗸	08/29/2016	Delete		
				a	dd action ite		

7. If you wish to attach a document, click on the "add attachment" button.

Attached File	Description	

8. Click the Browse button to find the document you wish to attach. Then click the Upload button.

File Attachment			
	? Help		
	Browse		
Upload Cancel			
Attachments Audit	1		
Attached File	Description	View	
Sample_Document.docx	Sample_Document.docx	View	Delete
		a	dd attachr

9. Prior to clicking on the Submit button, review the Advising Note. Once clicking the Submit button, a message will appear warning that Advising Notes **cannot be edited.** Since you have reviewed the Advising Note, click the Yes button.

Notes cannot be edited. Are you sure you would like to continue? Click Yes to continue or No to go ba	ck and make c	nanges. (0,0)
	Yes	No

Updating an Advising Note

1. To update and Advising Note, click on the Advising Note icon and then click on the "update note" button.

							Personalize Find	View All	A Firs	t 🗹 1 of 1 🕨 Last
Ad	vising Note	reated By	Assigned To	Institution	Subject	Category	Subcategory	Note Status	Action Items	Last Updated
	•			University of Pittsburgh	Discussed Class Schedule for 2016 Fal	Course I Enrollment	Class Schedule	Open	Pending	07/22/2016
	update	note	notify advisee							
	Note Items Personalize Find View All 🕮 🛗 First 🚺 1 of 1 🖸 Last							Last		
1	Note (tem	Entered On		Entered By	с	omment				
3	L	07/22/2016			S b A	uzie and I c e taken in 2 STRON 008 400, and H1	discussed the cla 2016 Fall. She is 9, INFSCI 1052, IST 1019.	sses to s to take MATH		

2. Enter the Advising Note text and click the Submit button.



My Advising Notes

1. The My Advising Notes page allows advisors to search all of their advising notes by Category, Subcategory, Note Status, and Action Items. Navigate to Navigate to Self Service > Advisor Center > My Advising Notes.



2. Select your search criteria and click the Apply Filter button. Click on the Advising Note icon to see the note.

▽ Filter	Notes									
Instit Categ Subca Note S	ution [ory [tegory [Status [Open V	✓ Created By ✓ Created ✓ Last Updated Action Items	7 Pe	Q Days anding V CLEAR ALL APPLY FIL	▼ ▼				
	Personalize Find 🛱 🗮 🛛 First 🖬 1-2 of 2									
Advising Note	Name	Institution	Subject	Category	Subcategory	Assigned To	Created By	Note Status	Action Items	Last Updated
	Test Student 3	University of Pittsburgh	Discussed Class Schedule for 2016 Fall	Course Enrollment	Class Schedule			Open	Pending	07/22/2016