

Advising Notes in PeopleSoft

Adding an Advising Note

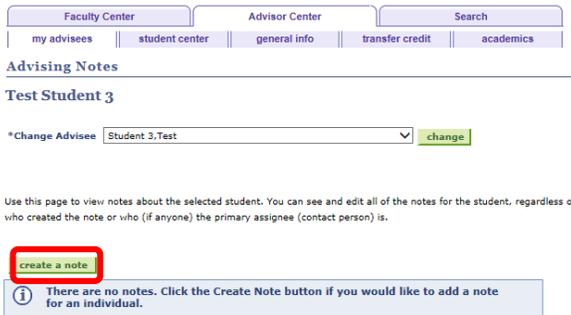
1. Navigate to Self Service > Advisor Center > My Advisees



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



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

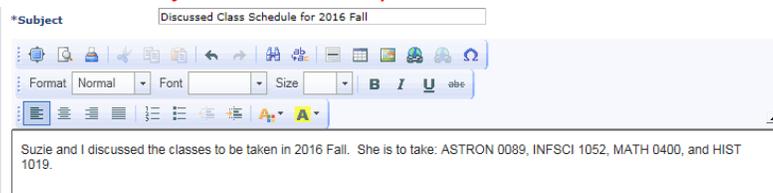


4. Select “University of Pittsburgh” for the Institution and the appropriate Category and Subcategory. Leave the Status as “Open” and the Advisee Access to “No” (advisees cannot view Advising Notes at this time).

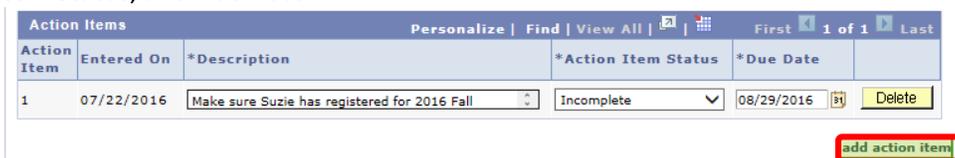


5. Create a meaningful title for the Subject field and type your notes in the text box.

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.



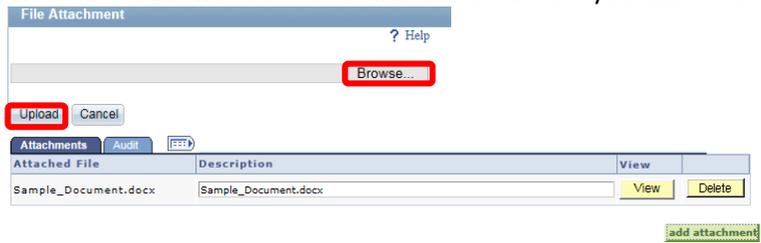
6. If you wish to set an action item for yourself, click on the “add action item” button and enter the Description, Action Item Status, and Due Date.



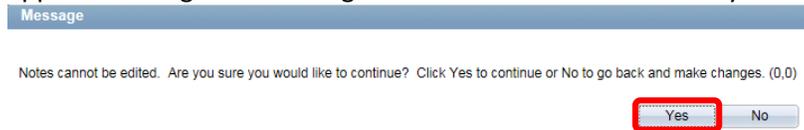
7. If you wish to attach a document, click on the “add attachment” button.



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



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.

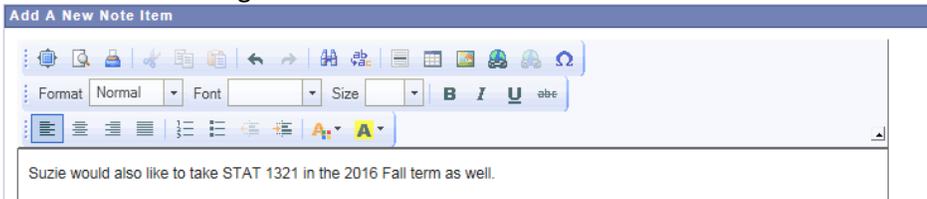


Updating an Advising Note

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

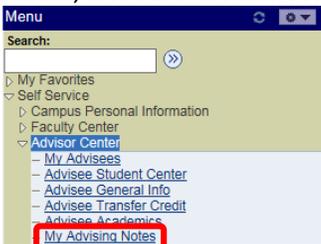


2. Enter the Advising Note text and click the Submit button.

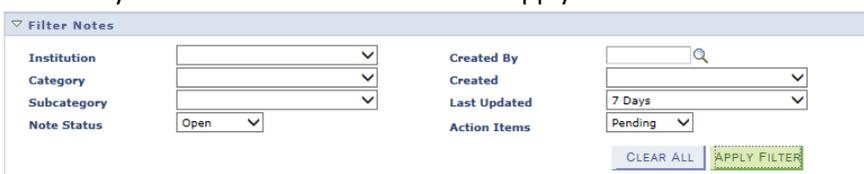


My Advising Notes

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 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.



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	[Redacted]	[Redacted]	Open	Pending	07/22/2016