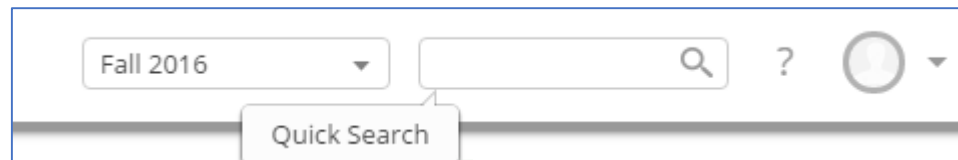


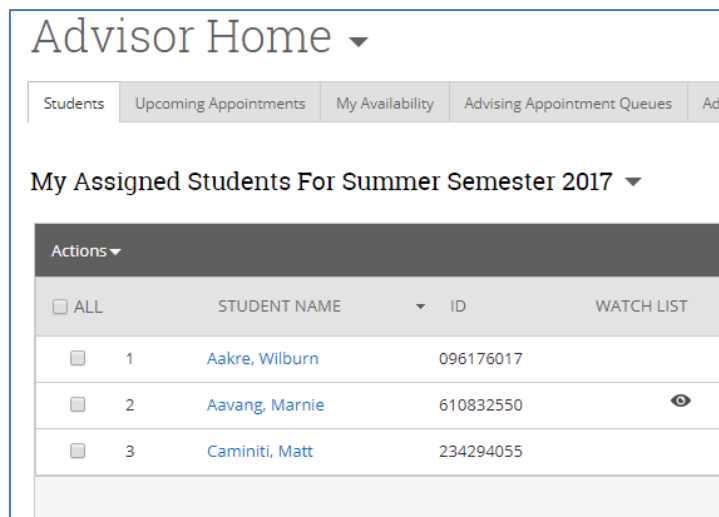
# Searching for a Student and Taking Notes

## Quick Search

Search for a student or user in the Quick Search in the top right corner of the platform. Able to search by first name, last name, or student ID.



Alternatively, you can navigate to a student's profile by clicking on their name from your Advisor Home.



## Submitting Advising Reports (Taking Notes)

From your Advisor Home, check the box beside the student you are adding notes for. Then click Actions → Advising Summary Report. Alternatively, you can open the Advising Summary Report from the student profile. From the student profile, on the right-hand side you will see the option to “Report on Advising”. Either of these options will allow you to take notes on the advising interaction. Creating an advising summary report also creates a retroactive advising appointment in the system. Capturing your notes in this manner is the best way to both add notes and document a drop-in appointment.

If the appointment was pre-scheduled, you want to be sure your notes are associated with the schedule appointment. In that case, create your notes from the “upcoming appointments” tab on your Advisor Home.

In the advising report, select the reason for the visit, the meeting type, and the location of the appointment. Use the Comments Box to capture free form advising notes during the session. Note that you can minimize the notes box and come back to it later, so you can also view the student profile while taking notes. If you minimize an advising summary report, it goes to the “Dialogues” box in the upper left hand corner of your screen. See example Advising Summary Report on the next page.

**ADVISOR REPORT FOR TOM FAILEAB**

### Appointment Details

An appointment will be created after you submit this report.

Reason:


Meeting Type:

Course:

Date of visit:

Location:


### Attendees



Kate Matthews  
Administration, Advisor

Attended

Arrived:  Departed:



Tom FailEAB - tfail

Attended

Arrived:  Departed:

### Report Details For Tom FailEAB

Majors/Minors Discussed

### Comments Box

**B I** | | |

### Attachments

Attach File

No file chosen

## Viewing Historic Notes from Starfish

Navigate to a student's profile page. Select the "Reports and Notes" tab. You will see a section called "Notes". For any students who had notes taken on them in the Starfish platform, those notes will appear here. This section ONLY contains historic notes from Starfish.

Any current notes on students that have been taken in the SSC platform will show up in the "Reports and Notes" tab as well. You can find these by scrolling down to the "Advising Summary Reports" section.