

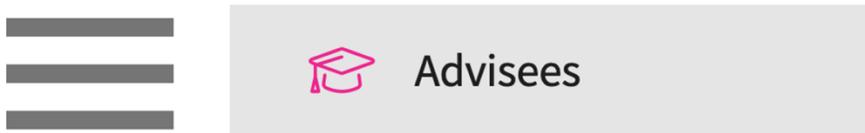
This guide details how to view and manage advisee profiles, including tagging students for better categorization. You will find step-by-step instructions for accessing student profiles, updating academic information, logging communications and interventions, and adding tags for efficient organization.

- [Viewing Advisee's Profile](#)
- [Tagging Student Profile](#)

Viewing Advisee's Profile

You can view and manage advisee profiles by selecting "Advisees" from the dashboard or left menu. This section includes instructions on searching for students, accessing profile tabs, and updating student information.

1. Select Advisees from your dashboard or left menu.

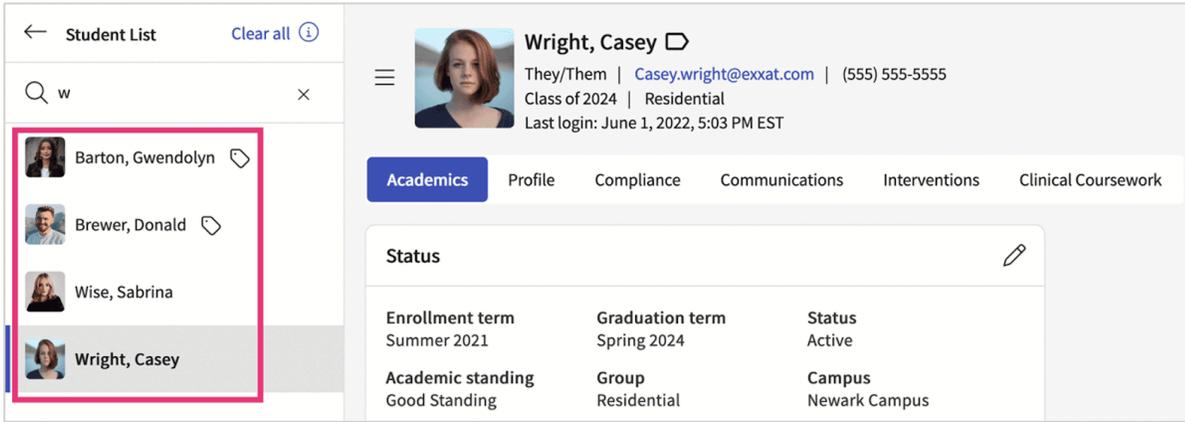


2. Select the student you'd like to manage.
 - a. Use the search box or filter to quickly find what you are looking for.
 - b. The system will display all the students you have associated with. If the student that you manage is not listed within this section, contact your system administrator
 - c. You will also find the Associated/Faculty role assigned to each student.

STUDENT NAME ↑	STUDENT ID	EMAIL	PHONE	ASSOCIATED ROLE	STATUS	COHORT
Adkins, Brian**	496983	brian.adkins@example.com	(555) 555-5555	Clinical Advisor	Active	Class of 2025*
Bailey, Teri**	375296	teri.bailey@example.com	(555) 555-5555	Clinical Advisor	Active	Class of 2025*
Barton, Gwendolyn	529471	gwendolyn.bartonpt@example.com	(555) 555-5555	Academic Advisor	Active	Class of 2023
Blair, Marty*	563812	marty.blair@example.com	(555) 555-5555	Clinical Advisor	Active	Class of 2025*
Brewer, Donald	195632	donald.brewerpt@example.com	(555) 555-5555	Clinical Advisor	Active	Class of 2023
Chen, Lucy	36129594	lucy.chen@example.com		Clinical Advisor	Active	Class of 2022*
Dawson, Spencer**	7000	spencer.dawson@example.com	(555) 555-5555	Clinical Advisor	Active	Class of 2025*
Deltra, Kay*	329178	kay.deltra@example.com	(555) 555-5555	Clinical Advisor	Active	Class of 2022*
Holt, Max	945128	max.holtpt@example.com	(555) 555-5555	Academic Advisor	Active	Class of 2021*
Jaylee, Valerie	981673	valerie.jaylee@example.com	(555) 555-5555	Clinical Advisor	Active	Class of 2022*

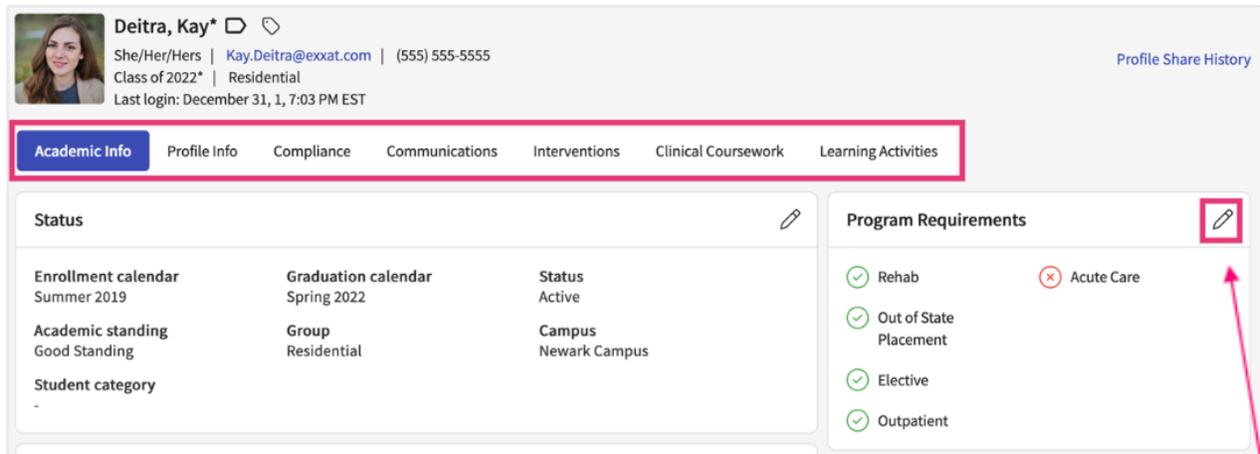
3. The student's profile will load.

4. You can easily switch to view other student profiles using the left panel.



5. The profile will contain the following tabs. Click on each of them to view and manage information!

1. **Academics:** you can update program information, requirements, associated faculty, view attestations, and add any specific notes and documents here. This section will be view only for your students.
2. **Profile Info:** view and edit information student provided on their profile.
3. **Compliance:** view the status of all compliance items assigned.
4. **Communications:** log any communications you've had with your student.
5. **Interventions:** log any interventions for your student.
6. **Clinical Coursework:** review all placements for your student. This will include completed assignments!
7. **Learning Activities:** easily view completed learning activities by type.

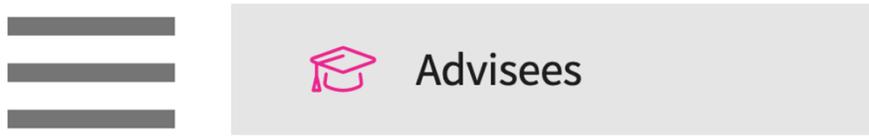


Edit information

Tagging Students

We know that programs want to categorize things in unique ways using individual labels and even individual colors. “Tagging” allows you to do just that!

1. Select Advisees from your dashboard or left menu.



2. Select the student you'd like to manage.
 1. Use the search box or filter to quickly find what you are looking for.
 2. The system will display all students you have been associated with. If a student that you manage is not listed within this section, contact your system administrator.

STUDENT NAME ↑		STUDENT ID	EMAIL	COHORT	PHONE	GROUP
Blair, Marty	🔖	563812	marty.blair@exxat.com	Class of 2025	(555) 555-5555	Residential
Brewer, Donald	🔖	195632	donald.brewer@exxat.com	Class of 2023	(555) 555-5555	Residential
Dawson, Spencer	🔖	7000-41	spencer.dawson@exxat.com	Class of 2025	(555) 555-5555	Residential

3. The student's profile will load. Click on the tag icon.



Deitra, Kay*  

She/Her/Hers | Kay.Deitra@exxat.com | (555) 555-5555
Class of 2022* | Residential
Last login: December 31, 1, 7:03 PM EST

Academic Info | Profile Info | Compliance | Communications | Interventions | Clinical Coursework | Learning Activities

4. A pop up will appear, allowing you to select from the existing list. Check off any needed tags and click Apply.

Total tags (8) Add

- Observant ✎
- Parent ✎
- Relies on Public Transit ✎
- Requires Accommodations ✎
- Scholarship ✎

Apply

5. Not seeing a tag you need? Click on Add.

Total tags (8) Add

- Observant ✎
- Parent ✎
- Relies on Public Transit ✎
- Requires Accommodations ✎
- Scholarship ✎

Apply

6. A second pop up will appear where you will provide the new tag's name and assign a color. Click Add once done.

← Add Tag

Tag Name

New Tag

Add

7. Once you've applied tags, you can see them by hovering over the tag icon.

Deitra, Kay* 

She/Her/Hers | Kay.
Class of 2022* | Resi
Last login: December

Academic Info Profile Info

Status

- Observant
- Requires Accommodations
- Scholarship
- Military
- Employment Offer

Important Note:

- **Faculty cannot add a student in the system. Only school administrators can add student and associate the student with the faculty member.**