

Navigate360: Adding a Note to a Student

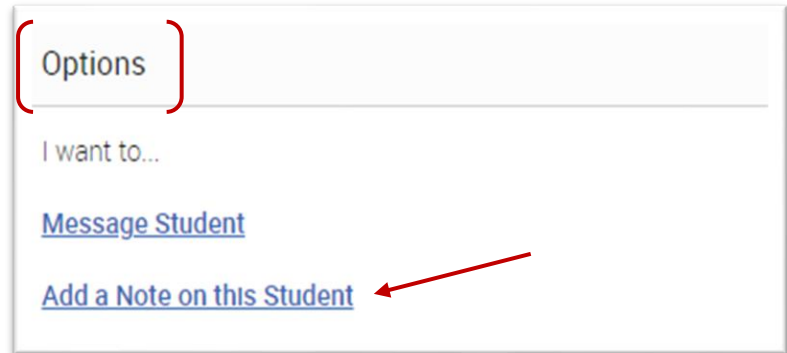
Notes can be used to record information related to a student profile, and are not tied to specific appointments.
Notes can be made visible to students.

1. Open the student profile page

- Open a student profile by typing the student name or E Number into the top [Quick Search](#) bar. Select the appropriate student by clicking their name from the list which drops down from the [Quick Search](#) bar.

2. Add a Note to the students

- Click [Add a Note on this Student](#) in the [Options](#) box on the right of the student profile page.
- An [Add a Note to Student](#) window will appear.
- In the [Note \(Required\)](#) text box, type information about administrative or support work done on behalf of the student.
- Click inside the [Note Reasons](#) box to select an applicable Note Reason. Note Reasons place a label on the Note for easy sorting and filtering later. Note reasons do NOT limit who can see the Note. Additional boxes must be checked later to restrict or permit visibility for other users. [Note Reasons](#) include:
 - [Note to Self](#)
 - [Note to Staff Faculty](#)
 - [Note to Student](#)
- If none of the [Note Reasons](#) are applicable, leave the [Note Reasons](#) box blank.



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The screenshot shows a web form titled "ADD A NOTE TO". On the left is a large text area for the note, with a toolbar containing bold (B), italic (I), bulleted list, numbered list, link, and paragraph options. Below the text area is an "Attach File" section with a "Choose File" button and "No file chosen" text. On the right side, there is a "Note Subject" section with a user profile icon labeled "Senior". Below that is a "Relations" section with "Note Reason" and "Note URL" input fields. A red bracket highlights the "Visibility" section, which contains two checkboxes: "Staff Name Only?" and "Student Name?". At the bottom right are "Cancel" and "Save Note" buttons.

- Paste a URL into the *Note URL* box, if needed.
- NOTE: This may be helpful to do if this Note is about referring the student to a resource. For example, an Advisor may want to include the website for a Financial Aid SAP appeal or the Registrar's enrollment schedule.

- Select the appropriate visibility by checking the boxes under *Visibility*:
 - If no box is checked = the user who created the Note and other staff or faculty users will be able to see the Note, but the student will not. (*Note to Staff/Faculty*)
 - If the Staff Name Only box is checked = only the user who created the Note will be able to see the Note (*Note to Self*)
 - If the Student Name box is checked = the user who created the Note, the student, and other staff or faculty users will be able to see the Note, but the student will not. (*Note to Student*)
 - If the Student Name and Staff Name boxes are checked = only the user who created the Note and the student will be able to see the Note, but the student will not. (*Note to Student*)
- Click *Save Note*.