Navigate - Adding a Note to a Student

*Quickly add an internal note to a student profile in Navigate.*

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. To add a Note to the students:
   - Click *Add a Note on this Student* in the *Current Notification or Referrals* box on the right of the student profile page.
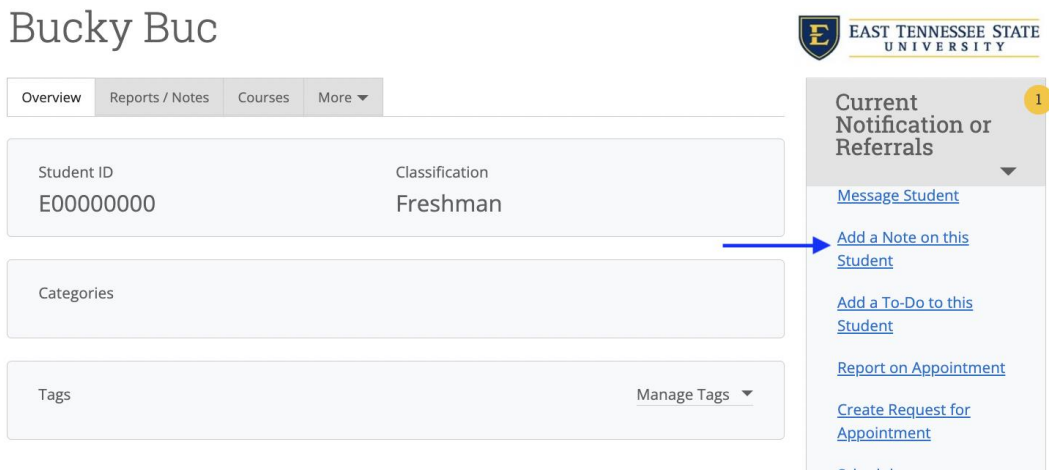
   - An *Add a Note to Student* window will appear.
   - In the *Note (Required)* text box, type information about administrative or support work done on behalf of the student.
   - Click inside the *Note Reasons* box to select an applicable Note Reason. Note Reasons place a label on the Note for easy sorting and filtering later. Note reasons do <u>NOT</u> 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.
   - 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.

o   Select the appropriate visibility by checking the boxes under *Visibility*:
- If <u>no</u> 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 <u>Staff Name Only</u> box is checked = only the user who created the Note will be able to see the Note (*Note to Self*)
- If the <u>Student Name</u> 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 <u>Student Name</u> and <u>Staff</u> <u>Name</u> 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*)

o   Click *Save Note*.