

Navigate - Viewing/Editing a Student Notes/Summaries

View and edit notes and summary notes on student profiles.

1. Open the student profile page

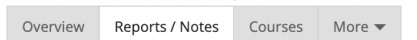
-
- Open a student profile by typing the student name or E Number into the top *Quick Search* bar. Select the appropriate student by clicking their name from the list which drops down from the *Quick Search* bar.



2. Review notes and summaries

- On the student profile page that loads, click the *Reports/Notes* tab under the student's name.
- Scroll to *Notes About Student*, *Alerts for Student*, or *Appointment Summaries for Student*.
 - In the *Notes About* box under the *Actions* column to the right, click *View Note*.
 - In the *Appointment Summaries For* box under the *Details* column to the right, click *View Details*.
- A pop-up window will appear with the details of the *Note* or *Appointment Summary*.

Bucky Buc



Notes About Bucky

Actions						
<input type="checkbox"/>	DATE	CREATED BY	NOTE	NOTE REASONS	ATTACHMENTS	ACTIONS
<input type="checkbox"/>	06/08/2022	Daniel VanZant	Bucky Buc missed an advising appointment.	Note to Student		View Note 06/08/2022
<input type="checkbox"/>	05/11/2022	Ethan Hutchinson	Type Note Here	Note to Self		View Note 05/11/2022
<input type="checkbox"/>	05/11/2022	Ethan Hutchinson	Type information here			View Note 05/11/2022

Appointment Summaries For Bucky

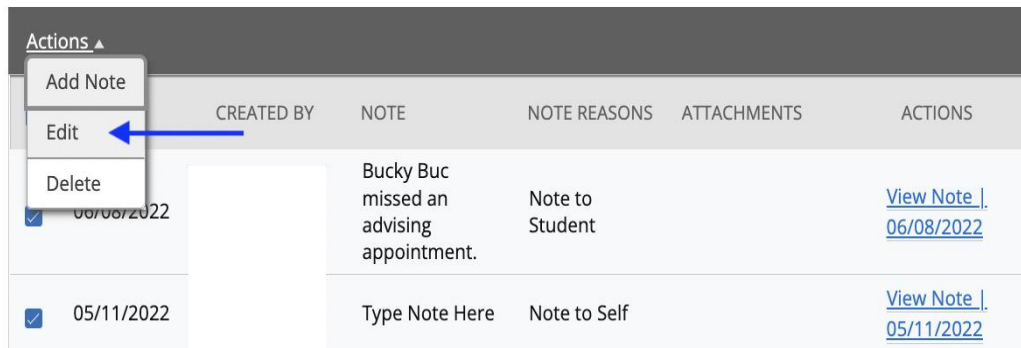
Care Unit:

DATE	REPORT FILED ON	COURSE	FOLLOW-UP	SUMMARY	DETAILS
09/08/2022 11:58am ET	09/08/2022			Discussed creating a planne...	View Report 09/08/2022 11:58am ET
08/30/2022 9:00am ET	09/08/2022			Blah blah blah blah blah bl...	View Report 08/30/2022 9:00am ET
08/25/2022 10:00am ET	09/08/2022			Bucky is considering parks ...	View Report 08/25/2022 10:00am ET

3. Edit Notes or Summaries

- To edit a *Note*, click the checkbox to the left of the *Note* or to be edited. Next click *Actions* in the top left corner of the *Notes About* box. Select *Edit Note* from the drop-down menu.
-
- To edit an Appointment Summary, under the *Details* column to the right, click *View Details*. Then scroll to the bottom of the *Appointment Report for Student* window that opens and click *Edit Report*.

Notes About Bucky



The screenshot shows a web interface for managing notes. At the top left, there is a dark grey header with the text 'Actions' and a small upward-pointing triangle. Below this header is a table with columns: 'CREATED BY', 'NOTE', 'NOTE REASONS', 'ATTACHMENTS', and 'ACTIONS'. The table contains two rows of data. The first row has a checkbox, the date '06/08/2022', the text 'Bucky Buc missed an advising appointment.', 'Note to Student', and a link 'View Note | 06/08/2022'. The second row has a checkbox, the date '05/11/2022', the text 'Type Note Here', 'Note to Self', and a link 'View Note | 05/11/2022'. A dropdown menu is open over the 'Actions' column of the first row, showing three options: 'Add Note', 'Edit', and 'Delete'. A blue arrow points from the 'Edit' option to the checkbox of the first row.

	CREATED BY	NOTE	NOTE REASONS	ATTACHMENTS	ACTIONS
<input type="checkbox"/>	06/08/2022	Bucky Buc missed an advising appointment.	Note to Student		View Note 06/08/2022
<input type="checkbox"/>	05/11/2022	Type Note Here	Note to Self		View Note 05/11/2022