

# Create a Note

## Create a Note

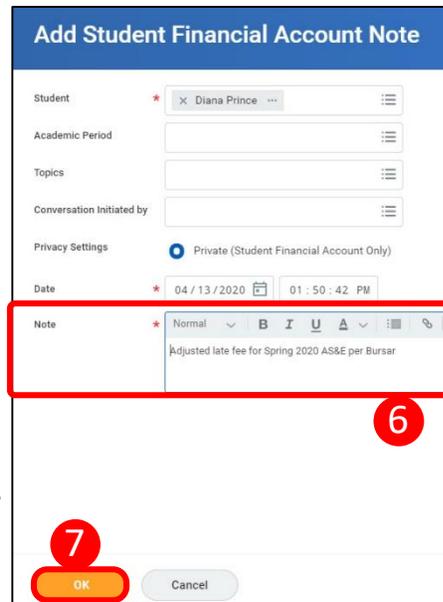
After manually adjusting a charge, you must add a note on the student's account explaining the reason for the adjustment and who authorized it. Follow all University and Family Educational Rights and Privacy Act (FERPA) guidelines when writing notes on student records

From your UR Student Home page

1. Type **Student Fin Note** in the search field (abbreviate to first 3 letters of each word)
2. Click **Add Student Financial Account Note**
3. Enter the student's name or UR ID in the Student field
4. Only the Date and Note field are required; add other information per business process
5. Do not change the Date field; if the note is for a previous day, enter that date in the Note itself
6. Enter a **Note** explaining the adjustment; follow note protocols provided

**Note:** UR Student does not have a spell checker. Be careful when writing notes and follow FERPA and University guidelines.

7. Click **OK** to add the note to the student's account
8. Click **Done**



**Add Student Financial Account Note**

Student \*

Academic Period

Topics

Conversation initiated by

Privacy Settings  Private (Student Financial Account Only)

Date \*

Note \*