

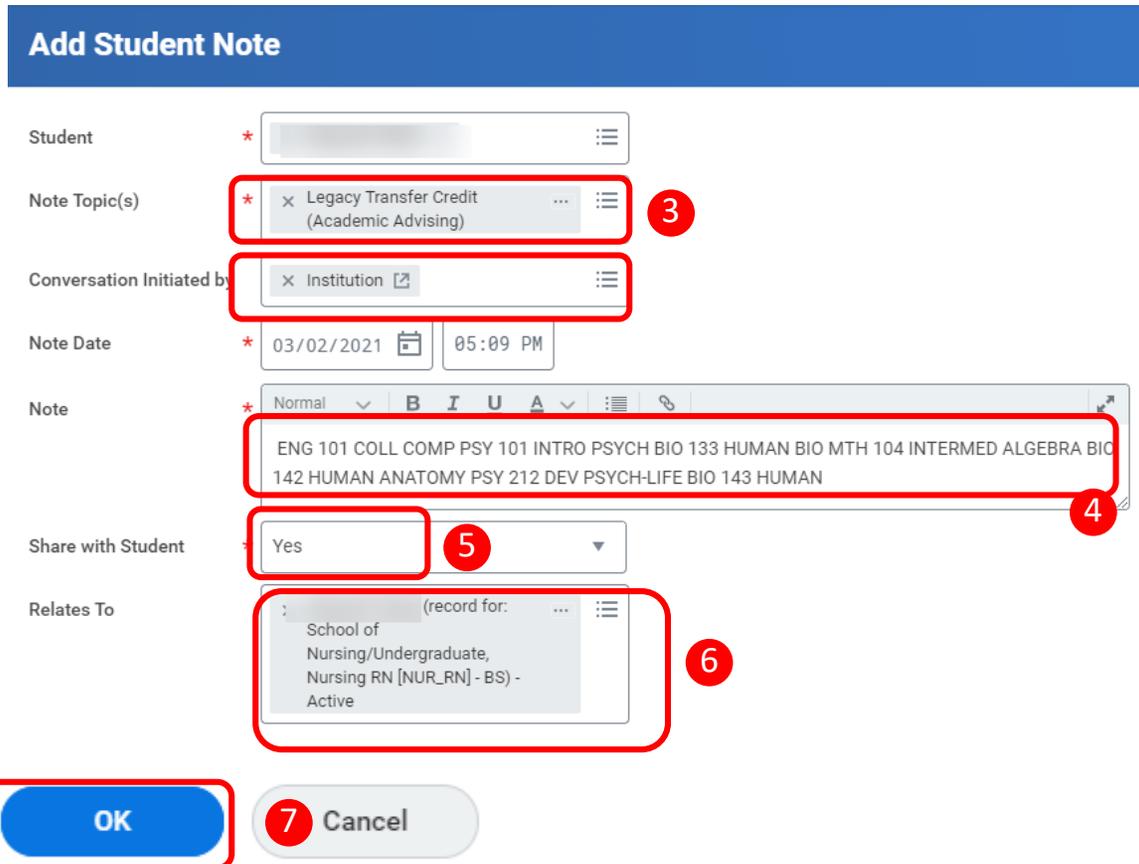
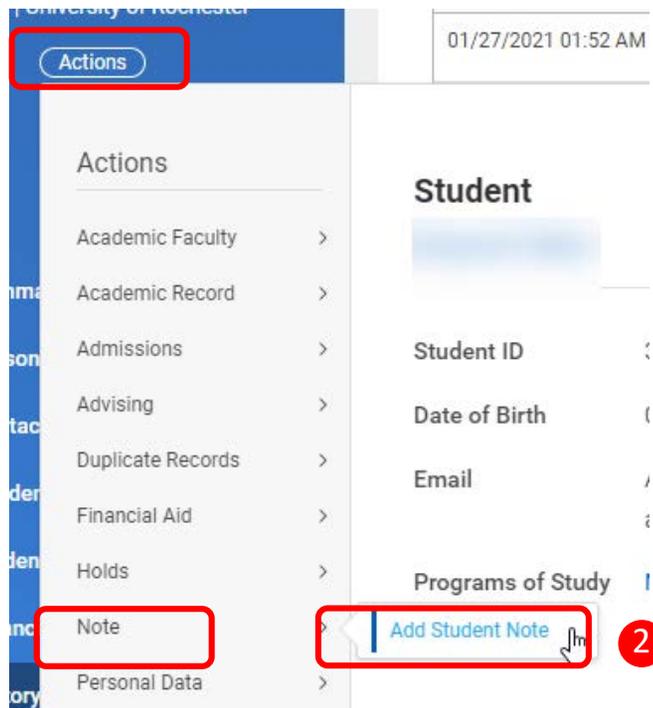
Use this card to understand how to add student notes

Find ...

1. Navigate to the Student (Search by URID, Name in the Global Search or use Find Students report).
2. From the **Actions** button, select **Note** and then **Add Student Note**. You can also add a note directly from the Note History page (see page 2 of this QRC)

Cont. ...

3. To a Student Note, select a **Topic** (see page 3 for options, you can select more than one in this field), indicate who **initiated the conversation**, if applicable and enter the date for the note.
4. Enter the text of the Note following FERPA and best practice guidelines
5. *Indicate if you want the note to be visible to the Student (NEW)*
6. Select a Relates To if you want to associate the note with an academic record, etc.
7. Click OK when done.





Cont. ...

4. Notes are visible for a student on the History tab on a student's profile



5. After accessing the History tab, select the Note History page to view a student's notes. Note that you can also add a note directly from this page using the Add Student Note button.

Student History    **Note History**

**Add Student Note**    Expand Notes

Turn on the new tables view

1 item

Creation Date & Time	Date & Time	Note Category	Note Topic(s)	Note Creator	Note Content	Share with Student	Relates To
03/02/2021 05:03 PM	03/02/2021 05:02 PM	Academic Advising	Legacy Transfer Credit (Academic Advising)		ENG 101 COLL COMP PSY 101 INTRO PSYCH BIO 133 HUMAN BIO MTH 104 INTERMED ALGEBRA BIO 142 HUMAN ANATOMY PSY 212 DEV PSYCH-LIFE BIO 143 HUMAN	Yes	(record for: School of Nursing/Undergraduate, Nursing RN [NUR_RN] - BS) - Active

6. You can only edit Notes that you have added yourself. Student Records Administrators (typically Registrars or the AS&E UG Records Office) can delete notes if needed.

Actions

- Audits >
- Favorite >
- Integration IDs >
- Reporting >
- Student Notes >**
  - Edit** (highlighted with red box)
  - Delete

**Student Note**

ENG 101 COLL COMP PSY 101 INTRO PSYCH BIO 133 HUMAN BIO MTH 104 INTERMED ALGEBRA BIO 142 HUMAN ANATOMY PSY 212 DEV PSYCH-LIFE BIO 143 HUMAN

Student: Abayneh Walle

Note Topic(s): Legacy Transfer Credit (Academic Advising)

Date: 03/02/2021 05:02 PM

Note: ENG 101 COLL COMP PSY 101 INTRO PSYCH BIO 133 HUMAN BIO MTH 104 INTERMED ALGEBRA BIO 142 HUMAN ANATOMY PSY 212 DEV PSYCH-LIFE BIO 143 HUMAN

Share with Student: Yes

Relates To: Abayneh Walle (record for: School of Nursing/Undergraduate, Nursing RN [NUR\_RN] - BS) - Active

COMP PSY 101 INTRO HUMAN BIO MTH 104 PSY 212 DEV PSYCH-LIFE BIO 143 HUMAN (highlighted with red box and red circle containing the number 6)



Academic Record Note Topics		
Academic Policy	Academic Probation	Administrative Committee Decision
Change of Status	Eastman Performances	Eastman School Placements
ECMS Programs	Grade Notes	Graduation Requirements
Internships	Legacy System Comments (from ISIS)	Master's Exams
PhD Exams	Program Extensions	Programs of Study
Training	Undergraduate Degrees	Warner Certification

Advising Note Topics		
Inter-department Collaboration	Legacy Transfer Credit (from ISIS)	Parent/Guardian Conversation
Student Meeting		