

Parts of a Note

ADD A NOTE TO STUDENT NAME

Note (Required) ← **Note Body** – The note can be written free text or copied and pasted from another document, such as an email.

Paragraph ▼

Note Reason – All notes should have a note reason selected via the Note Reason drop-down menu.

Note URL – A URL can be included here or in the note body. This is optional.

Visibility – Choose the visibility of the note and whether you want it to be 'private' or to be visible to the student.
See below for additional details about note visibility.

Attach File
Choose File No file chosen →

Attachments – Include any attachments that you want to be associated with the note.
If you are uploading an attachment in place of a written note body, best practice is to write above that *"Note is included as an attachment."*

Note Subject
Student Name
Advisor, Student

Relations
Note Reason
Note URL

Visibility
☐ Brian Williams Only?
☐ Student Name?

Cancel Save Note

Note Body – The note can be written free text or copied and pasted from another document, such as an email.

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Visibility – Choose the visibility of the note and whether you want it to be ‘private’ or to be visible to the student. *See below for additional details about note visibility.*

Attachments – Include any attachments that you want to be associated with the note.

If you are uploading an attachment in place of a written note body, best practice is to write above that “*Note is included as an attachment.*”

Additional Details About Note Visibility

By default, all notes are visible to any staff or faculty who completed the required FERPA training to receive access to Pathways.

Selecting the box to make the note ‘private’ (only visible to the author) does not exclude the note from a FERPA request. Also, university administrators and others who have access to view notes marked as ‘private’ may be able to see the note.

Making the note visible to the student means that the student can see the note in the Reports section of the Navigate360 student app, however they do not receive a notification that the Note has been added.

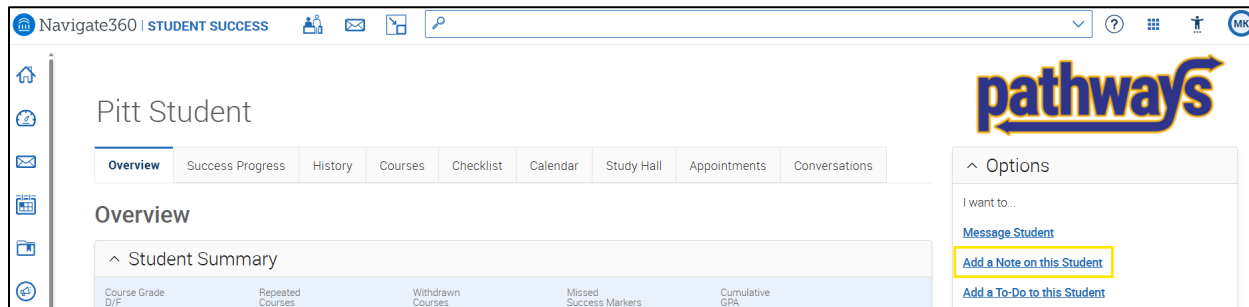
Adding a Note on a Student

Notes can be added to document information about a student or that you have shared with the student, or a specific topic of conversation that you had with the student. They differ from Appointment

Summaries which should be used to document the general details of a meeting that you had with a student. Notes can be added in several different places across the platform.

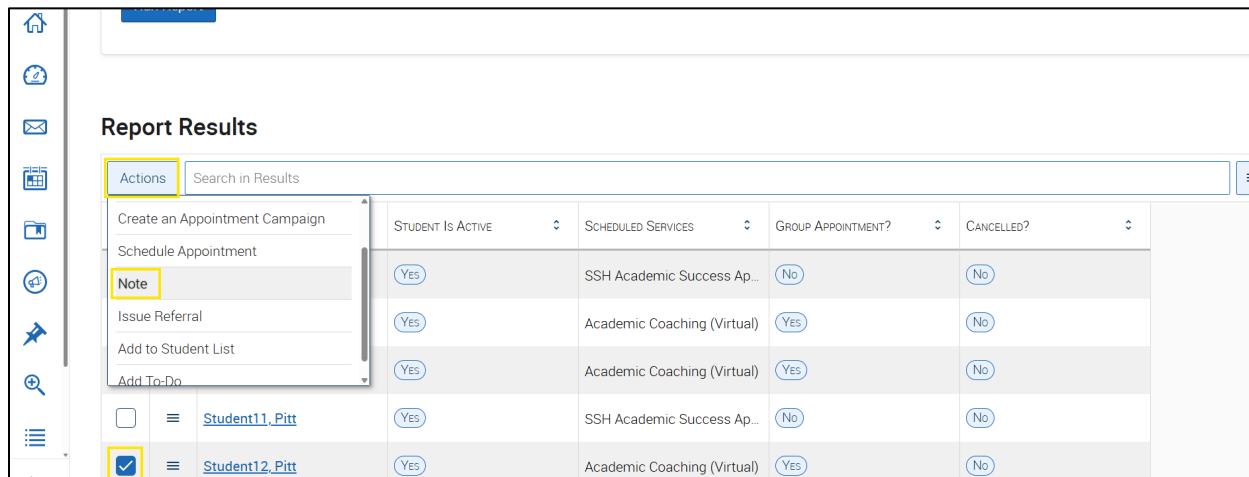
FROM THE STUDENT'S PAGE

From the student's page, select the **Add a Note on this Student** link from the Options container.



FROM YOUR ASSIGNED STUDENT LIST, OR AN ADVANCED SEARCH OR REPORT

Select the student(s) you would like to add a note for and using the Actions drop down menu, select the **Note** option.



This is the easiest way to add a note for multiple students (up to 100 students) at the same time. Like messaging, the note appears to be added to each student individually.

