

CU Navigate Training | Advisor Role

Adding Notes to Students

*Notes are appropriate for documentation not related to appointments (ex: substitutions, wanting to document email communications, forms).

To add a note on a student, go to the student's profile and click **Add a Note on this Student**

The screenshot shows the CU Navigate interface. At the top, there is a navigation bar with the 'NAVIGATE' logo, a search bar, and a dropdown menu for 'Terms' set to 'Fall 2021'. Below this is a student profile for a Psychology major. The profile includes a 'Current Alerts' sidebar on the right with a yellow notification icon showing '0'. The sidebar contains several options, with 'Add a Note on this Student' highlighted by a blue arrow. Other options include 'Message Student', 'Add a Reminder to this Student', 'Report on Appointment', 'Create Request for Appointment', 'Schedule an Appointment', 'Add to Student List', and 'Issue an Alert'. The main profile area shows various statistics like 'Course Grade D/F', 'Repeated Courses', 'Withdrawn Courses', and 'Missed Success Markers', all with a value of 0. It also shows 'Total Credits Earned' as 0.00 and 'Credit Completion %' as a percentage. The student's name is 'Psychology' and their major is 'Bachelor of Science Behavioral, Soc and Hlth Sci'.

Type the note and add any attachments. Do not click the boxes under visibility. Click **Save Note**.

The screenshot shows the 'ADD A NOTE TO' modal form. The form has a dark header with the title 'ADD A NOTE TO' and a close button. Below the header is a text area for the note, with a toolbar containing bold (B), italic (I), bulleted list, numbered list, link, paragraph, and undo/redo icons. To the right of the text area is the 'Note Subject' field, which is populated with 'Freshman Psychology'. Below the subject field are the 'Relations' fields, including 'Note Reason' and 'Note URL', both of which are empty. At the bottom right of the form are two 'Visibility' checkboxes, both of which are unchecked. At the bottom of the form are 'Cancel' and 'Save Note' buttons.

Having technical difficulties? Email CUNavHelp@clemsn.edu.