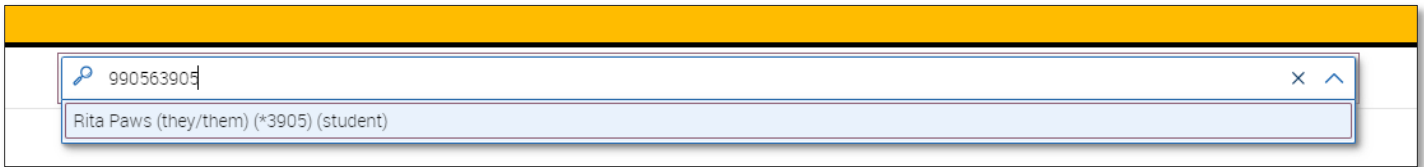


How to Add a Note

Staff can use notes to document information about a student that may not be specific to an appointment or visit. When needed, staff have the option to create private notes. They can also create notes that are visible to a student in the Navigate Student app. Staff are encouraged to include a note reason to be able to track specific information about UWM students. Note reasons include: *Course Drop, Name Pronunciation, Not Returning-Transferring, Plans to Re-Enroll*, etc. All users with permission to view student notes can access them in the History tab on Student Home.

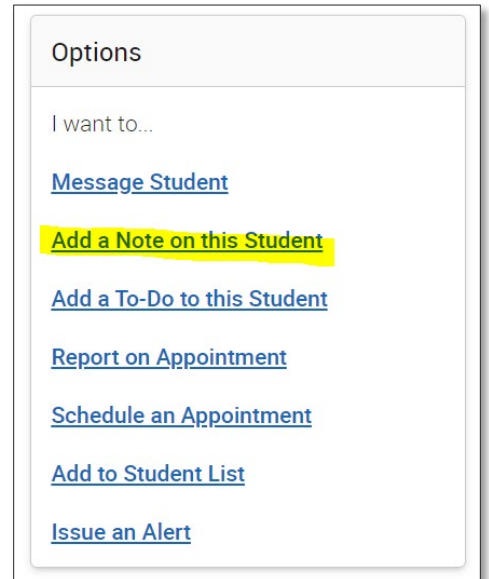
Option 1 – Adding a Note for an Individual Student

1. Using the **Quick Search** bar at the top of your Staff Home, type in the student's 9-digit ID number or email address to find the individual student profile.

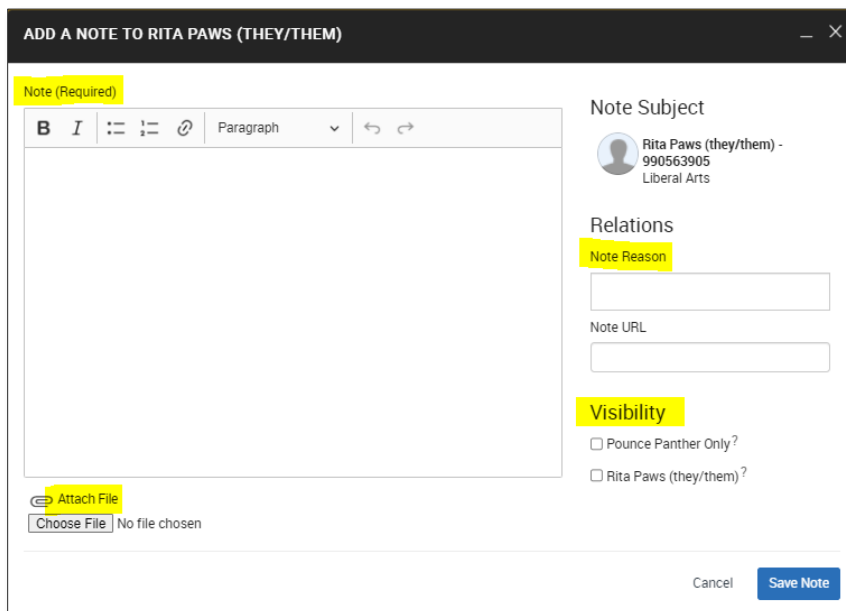


A search bar with a magnifying glass icon on the left and close and expand icons on the right. The text '990563905' is entered. Below the search bar, a dropdown menu shows the search result: 'Rita Paws (they/them) (*3905) (student)'.

2. On the lefthand side of the student profile, go to the **Options** panel, then click **Add a Note on this Student**.
3. In the pop-up dialogue box, you can then begin to add the note on the individual student.
 - a. If you don't mark a note as private (e.g., Pounce Panther Only), all staff users with permission to view student notes will be able to see your note.
 - b. To show a note to a student, check the box next to their name in the **Visibility** field.
 - c. There is a 10MB limit on attachments.



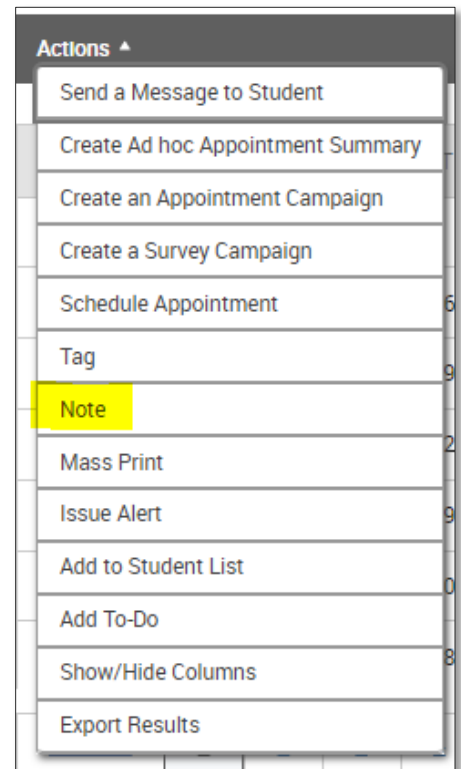
A vertical list of options under the heading 'Options'. The options are: 'I want to...', 'Message Student', 'Add a Note on this Student' (highlighted in yellow), 'Add a To-Do to this Student', 'Report on Appointment', 'Schedule an Appointment', 'Add to Student List', and 'Issue an Alert'.



A dialog box titled 'ADD A NOTE TO RITA PAWS (THEY/THEM)'. It features a rich text editor on the left with a toolbar containing bold, italic, bulleted list, numbered list, link, and paragraph options. Below the editor is an 'Attach File' button and a 'Choose File' button with the text 'No file chosen'. On the right side, there is a 'Note Subject' field with a profile picture and name 'Rita Paws (they/them) - 990563905 Liberal Arts'. Below that is a 'Relations' section with a 'Note Reason' field. Further down is a 'Visibility' section with two checkboxes: 'Pounce Panther Only?' and 'Rita Paws (they/them)?'. At the bottom right are 'Cancel' and 'Save Note' buttons.

Option 2 – Adding a Note for Multiple Students

1. Click on **Advanced Search** from the list of icons on the left-hand side. Then, open the **Student Information** tab.
2. You have the option to search for students by:
 - a. Manually entering their 9-digit ID number or email addresses
 - b. Using a previously created Student List
3. Click **Search** then check all or just the individual students you'd like to create a note for.
4. Then, **Actions > Note >** Provide general Note that applies to the multiple students selected.



Other:

- When more than one student is selected, the same note scripting will apply to each student record.
- While notes can be added to more than one student at the same time, there is a cap of 100 students for whom notes can be added to at once.
- If more than 100 students are selected, the **Note** option will no longer appear within the **Actions** menu. It is recommended to select 1 “page” at a time.

Related Articles

- [Notes](#)
- [Documenting a Student Interaction](#)

To access the [Navigate Help Center articles](#), you must first go into Navigate > Help > Help Center and keep the Help Center opened in a tab.