

# Notes



**What:** Notes can be used to record information related to a student profile, and are not tied to specific appointments.

**Where:** Notes can be found on the **Reports and Notes** or **History** tab of a student's profile and in the **Student Information** section of **Reporting**.

**Who:** Staff and faculty can use notes to document information about a student that may not be specific to an appointment or visit. When needed, staff and faculty can make a note visible to the student. Some schools may also allow the option of private notes.

**Conditions:** Notes are part of the Strategic Care module of Navigate. Depending on role permissions, users may be able to create, edit, delete, and view notes on student profiles, as well as add attachments to notes. Notes permissions are not Care Unit specific; therefore, users with the ability to view notes will be able to view notes created by staff in other Care Units. For private notes, the ability to turn this feature on or off is an EAB-controlled configuration. If private notes are on for your institution, there is a permission for users to see others' private notes which also allows those notes to be included in the Notes report. Contact our Partner Support Team (NavigateTechSupport@eab.com) if you want to turn private notes on or off.

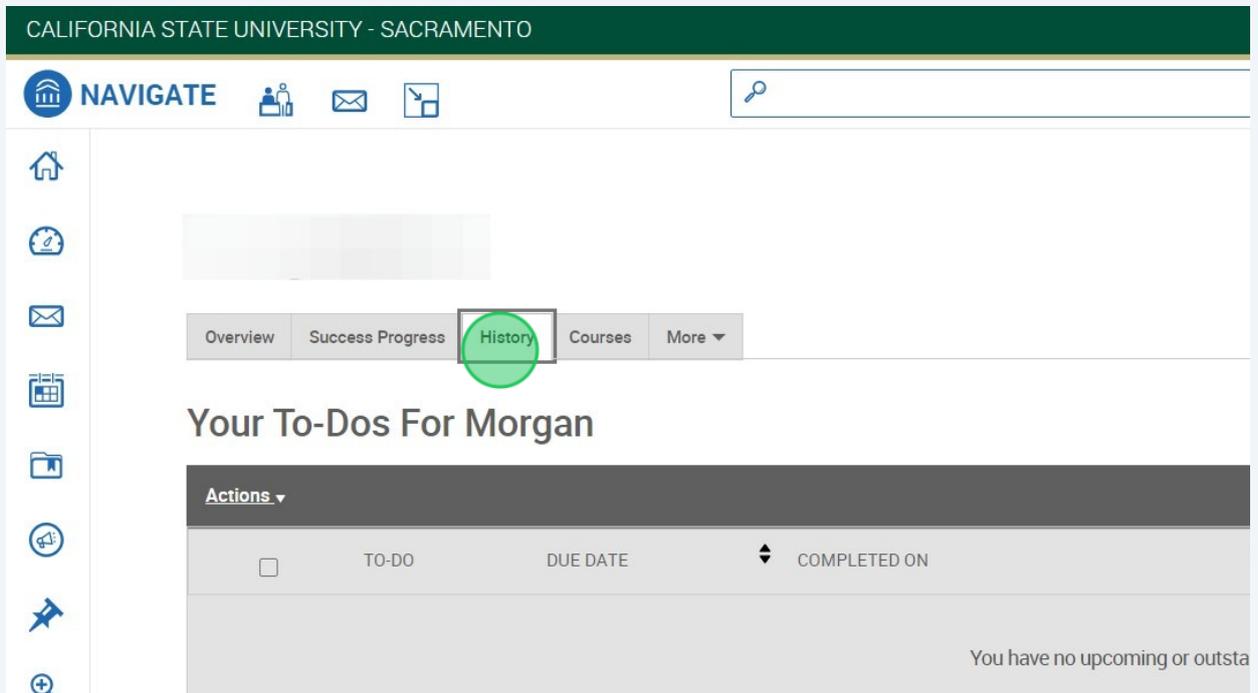
1

Navigate to <https://csus.campus.eab.com/home>

2

On the student profile, Notes can be found on the **History** tab along with other documentation, such as Appointment Summaries or Progress Reports. To view only Notes, you have two options:

Select **Note Added** in the History filter, as shown below.



### 3 Using the drop down menu for "View As:" You can select the following options

- Notes about Morgan
- Cases for Morgan
- Alerts for Morgan
- Progress Reports for Morgan
- Appointment Summaries for Morgan
- Morgan's Visits to Support Centers

Morgan's History View As: Morgan's History

▲ Collapse All

Filter Activity Types Select one or more activity types

— Apr

**Advising Appointment** ▲

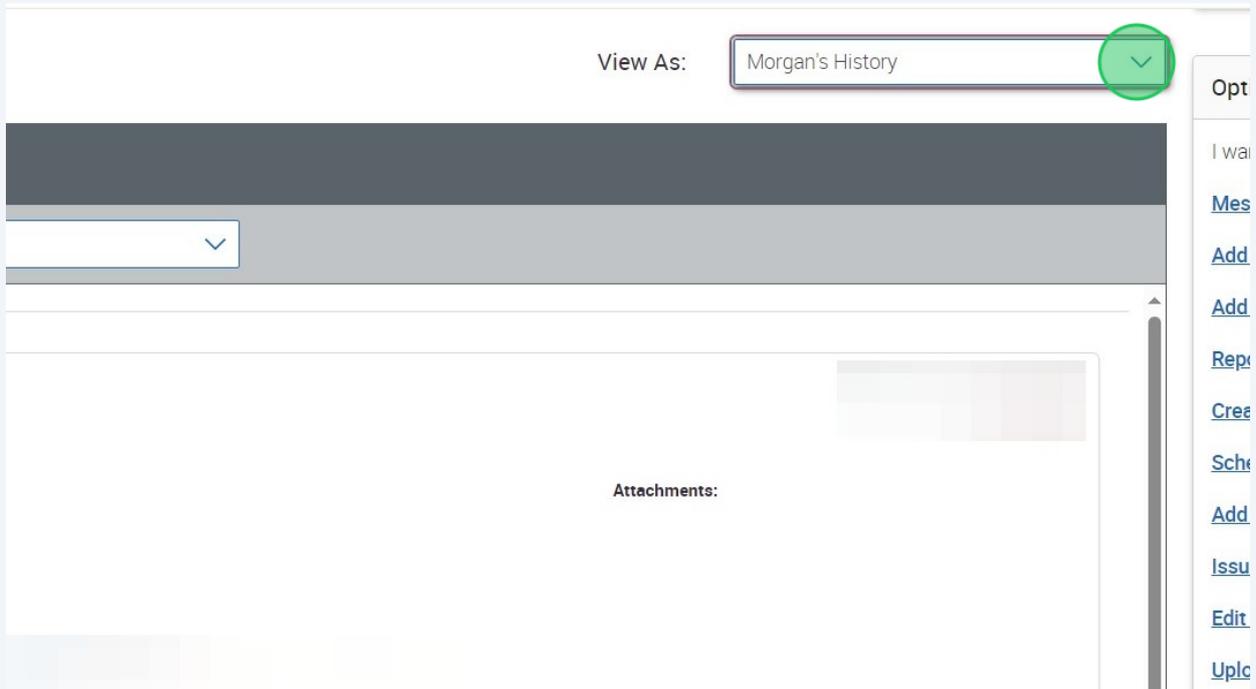
Wed, Apr First-Year Advising

**Time:** 3:00pm - 4:00pm  
**Location:** Academic Advising Center  
**Comments:**  
Morgan Derr: registration for fall

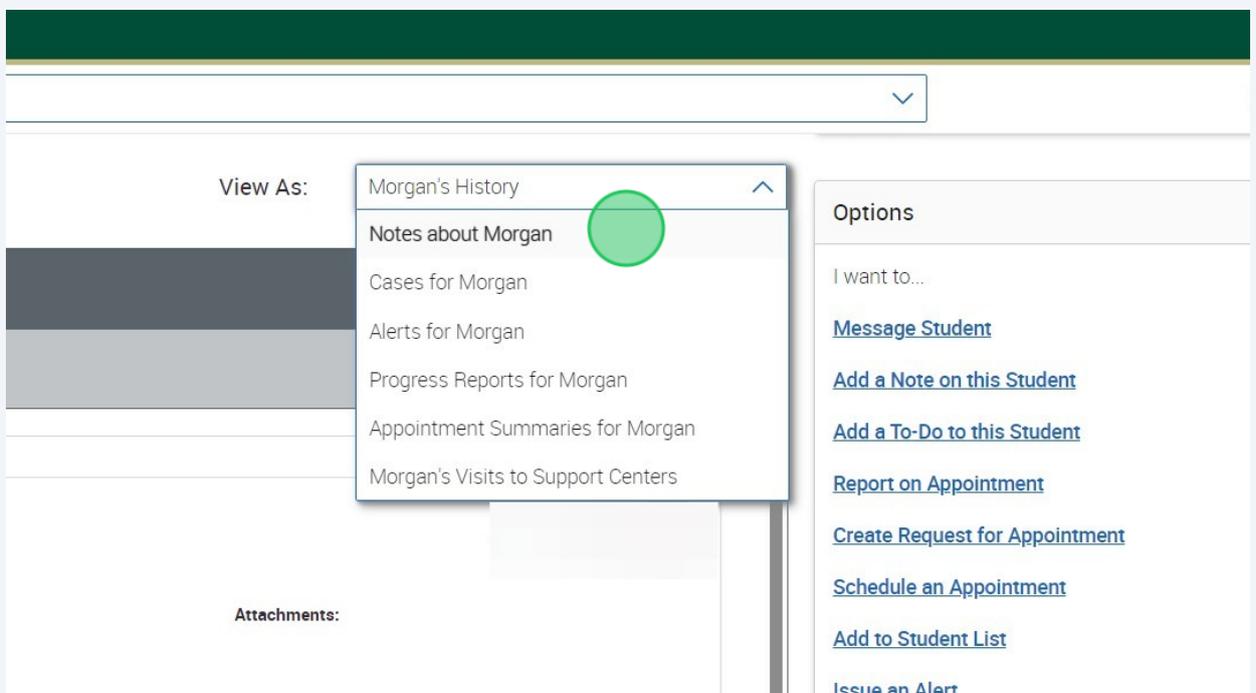
**Appointment Summary Notes**

[View Appointment Summary](#)

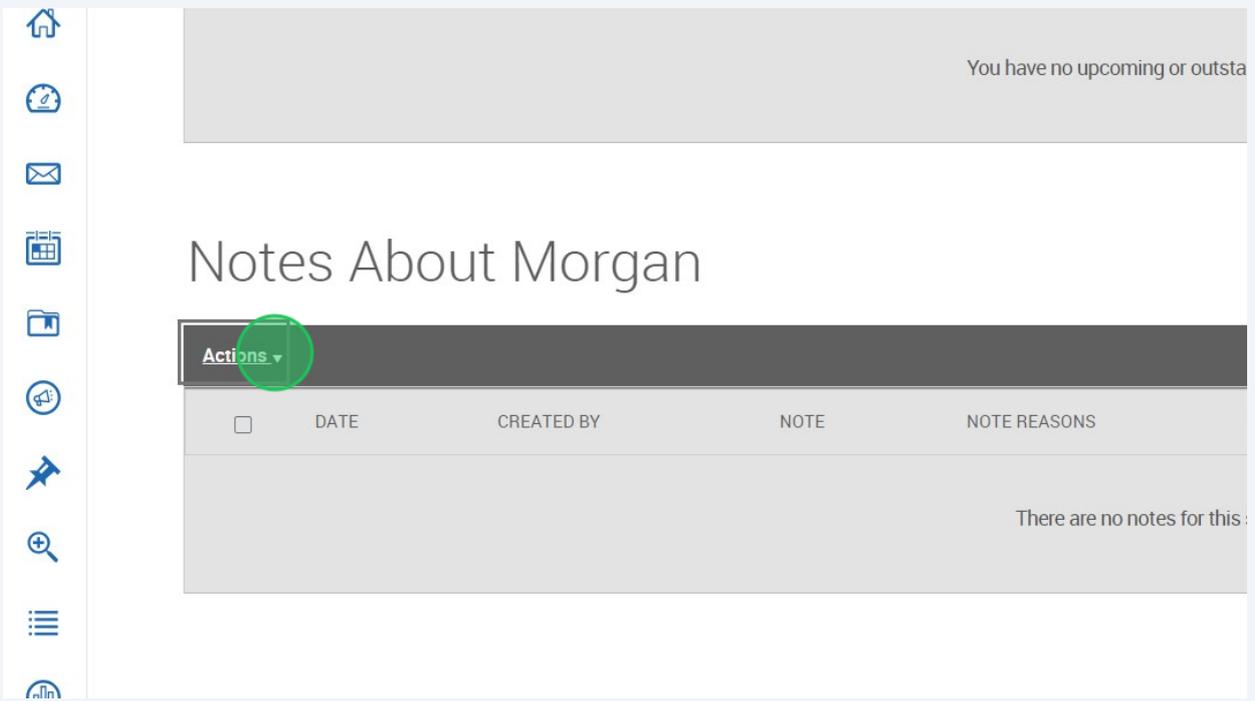
4 Click the drop down menu



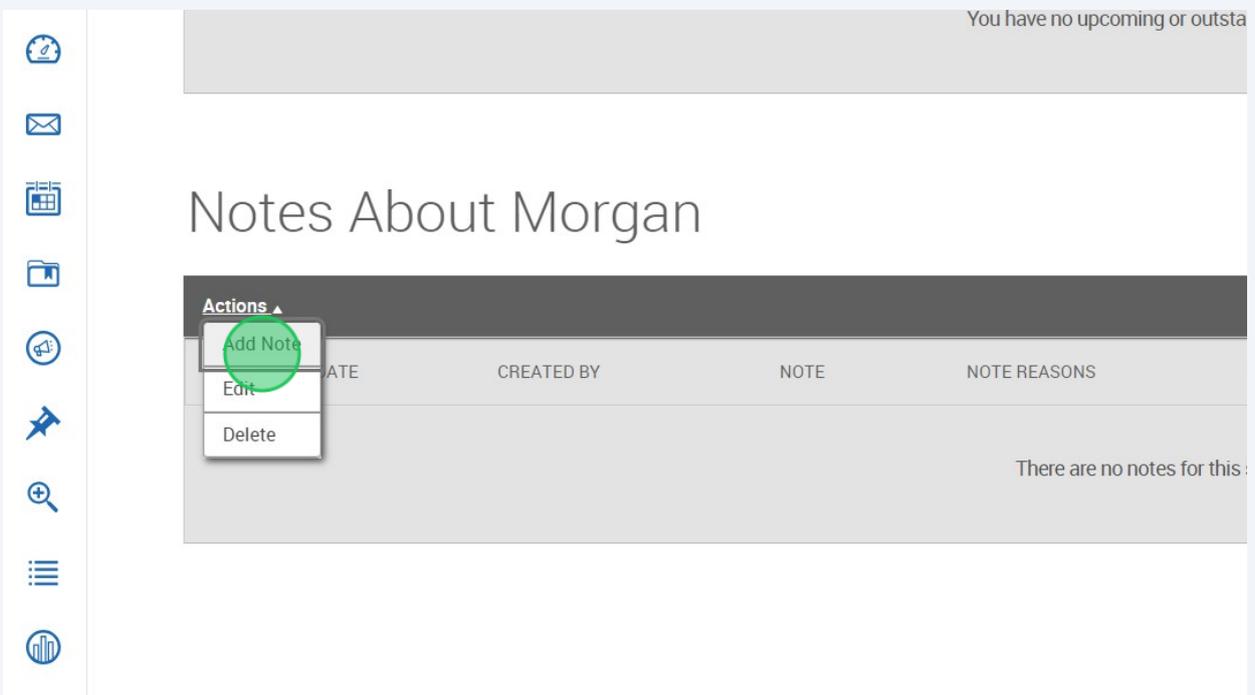
5 Click "Notes about Morgan"



6 Click "Actions"



7 Click "Add Note"



8

Note visibility is based on configurations and permissions. For example, if you don't mark a note as private, users with the permission to view student notes will be able to see your note, regardless of Care Unit. However, even if you mark a note as private, if your administrator gives another user permission to see private notes, that user will be able to see a private note. Users with the permission to edit notes that were created by others can edit your note. To show a Note to a student, check the box next to their name in the Visibility field. If you choose to make a Note visible to the student, it appears on the Reports page in Navigate Student or the Reports tab on the Student Home.

ADD A NOTE TO MORGAN

Note (Required)

**B** *I*

- ☰
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[🔗](#) Paragraph ↶ ↷

Note Subject

Relations

Note Reason

Note URL

Visibility

Only?

Morgan

Attach File

Choose File No file chosen

Cancel Save Note