Adding a Note on a Student

Notes offer an additional mechanism to jot down information about a student, collaborate across Care Units, and create a record of information provided directly to the student. Unlike summary reports, notes are not tied to specific appointments, nor are they formatted specifically for specific Care Units. Marshall University utilizes notes to track non-in person communication.

What Information Is Included?

Notes should only contain general information related to that student, possibly documentation. No information specific to an appointment should be included in a Note – please enter that information into an Appointment Summary Report instead. Within a Note, you can include the following information:

- Note (free text)
- Attachments
- Note Reason
- Note URL
- Visibility (private and/or visible to the student)

Important Note: Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).

How Do I Create This Documentation?

There are several different ways to create Notes – you will notice that "Note" is an option in the Actions dropdown bar throughout the platform. The easiest way to create a Note is from your staff homepage or a student profile. On your Staff homepage, under the "Students" tab, find the specific student in your "My Assigned Students" section, or click the drop down to find the student from one of your saved Lists. From this section, you can click on a student and select "Note" from the Actions drop down.
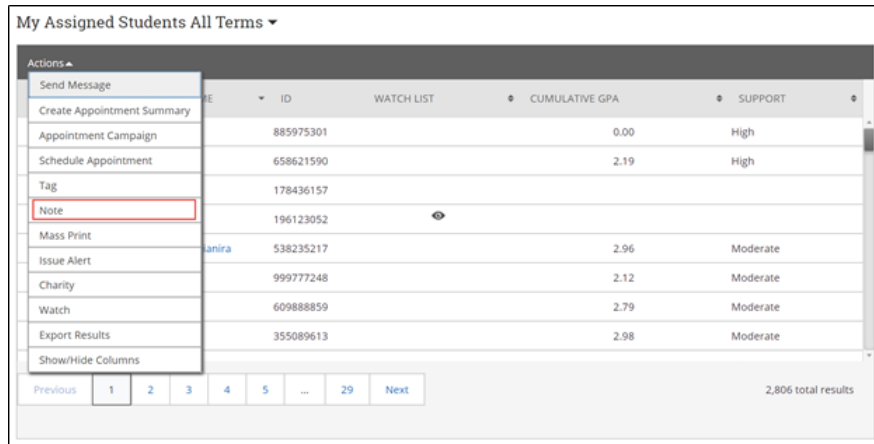
You can also create a Note from a student's profile page. Navigate to that specific student's profile and click "Add a Note on this Student" from the Actions menu on the right.
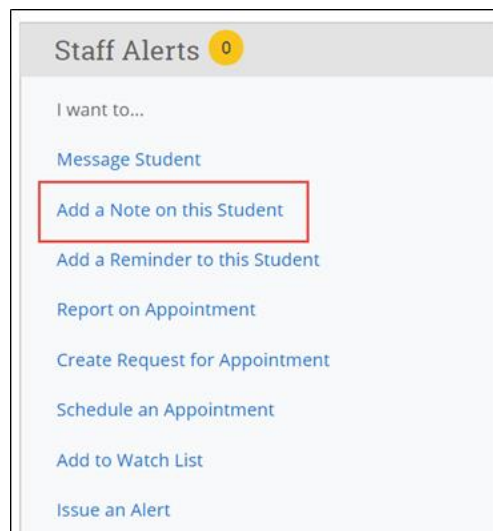
Reminder – Notes are not restricted by Care Unit. Anyone with permission to view Notes and to view the specific student information will be able to view your notes.

Where can I access this documentation in the future?

All Notes you filed can be found in two areas of the platform –the individual student's profile page or Reports.

On the student profile, notes live in the Reports and Notes tab along with other documentation, such as Appointment Summaries or Progress Reports. To view only notes, simply select **Note Added** in the History filter, as shown below.

Frequently Asked Questions

If I add a note to a student profile, can anyone see it?
Only users with the permission to view student notes will be able to see your note. However, if users have this permission, they will be able to see all notes, regardless of Care Unit.

If I add a note to a student profile, can anyone edit it?
Only users with the permission to edit notes that were created by others will be able to edit your note.

Can I add notes for multiple students at once?
Yes! 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. This can be done by selecting students in your queue (e.g. Advanced Search) and selecting the "Actions" menu. With the proper permissions, users can click "Note" to add a note to anywhere from 1 to 100 students. If more than one student is selected, the same note scripting will apply to each student record. If more than 100 students are in your queue and selected, the "Note" option will no longer appear within the "Actions" menu.