

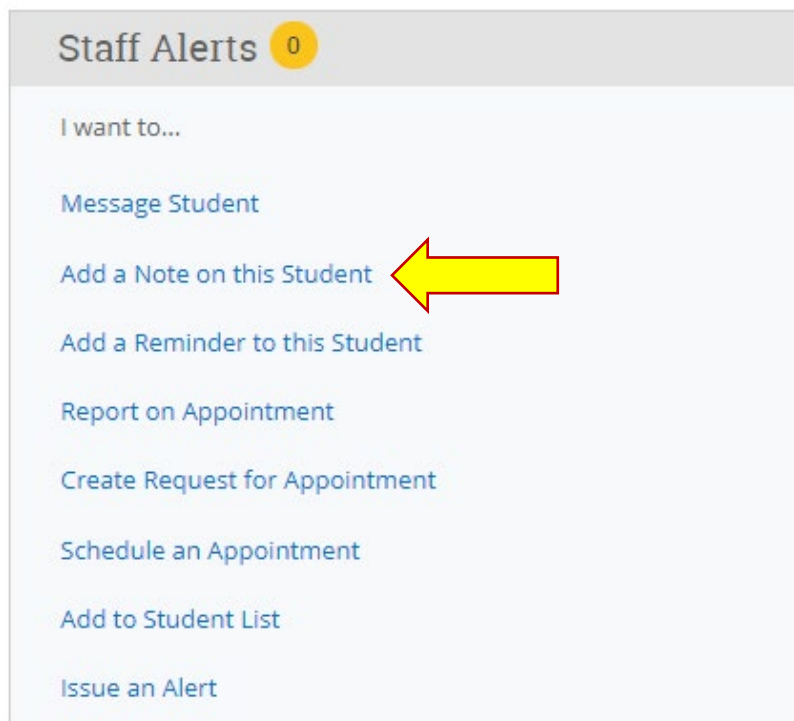
Navigate: Entering and Viewing Notes on a Student Profile

Objective: Notes can be used to record information related to a student profile and may not be tied to specific appointments. It may be helpful to think of notes like a “sticky note” that allows for information to be visible to anyone working with the student. Notes are visible to anyone with permission to see notes.

- Notes describe information about the student that you gained outside of an appointment. They are often more transactional in nature (e.g. Center for Student Success, select “Follow Up on Appointment”, and then document further information or subsequent updates on the student, whether or not they completed steps recommended (e.g. visit with Career Specialist). You can select to make the note accessible/visible to students. *However, even if a Note is not visible to a student, it is still part of the student’s official educational record and therefore included within any student requests for their records.*

Important: 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). See the Carthage College Guidelines for Recording Appointment Summaries and Notes in Navigate

- Navigate to a student’s profile page. Here are a couple of suggested ways of searching for students.
 - From your Staff Home page click the drop down menu to select a list of students assigned to you.
 - Search for a student or user in the Quick Search in the “Quick Search” bar at top of the platform. You are able to search by first name, last name, or student ID.
- On the right side of the student profile, click Add a Note on this Student.



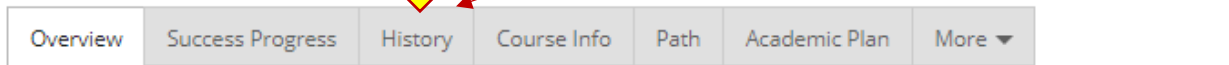
3. On the pop up screen, enter the note in the text field and if applicable, select a note reason.
4. Click Save Note.

Viewing Notes (Dependent on role permissions)

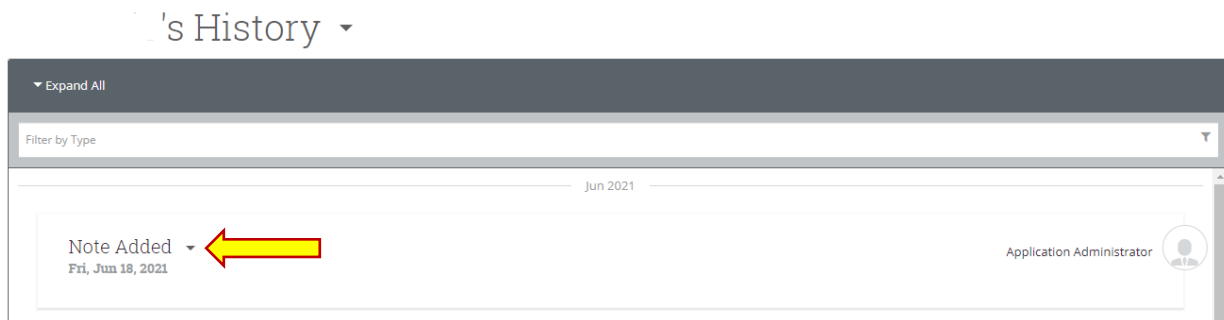
1. From the student's profile page, click the History tab.



FYI: The History tab in training is Reports/Notes in the Live Navigate site.



2. Scroll down to the student's history. To view the note comments, click the arrow next to Note Added.



Related Navigate Help Center Articles (requires logging into Navigate): [Notes](#)