How to Add a Note

Notes are used to document information about a student, whereas Appointment Summary Reports are used to document interactions with a student.

1. To add note to a student’s page, simply click on “Add a Note on this Student” when you are on the student’s page.

2. Type your note. You can make the note only visible to you. If you don’t check that box, everyone can see your note. Regardless of who can view the note, it is still subject to FERPA. Checking the student’s name does not mean that the student will get an email about the note. It means that if the student logged into the Navigate platform (which they can’t), they would see the note.