


Student Notes

Path: Menu icon  > Students > Student Notes

Overview

This feature allows you to post pertinent notes regarding a student. If the Category assigned to the note is marked to do so, the Student Note can appear in a popup when a user accesses that student's information.

User Permissions

In Classic: **Management > Site Level > Maintain User IDs and Permissions**

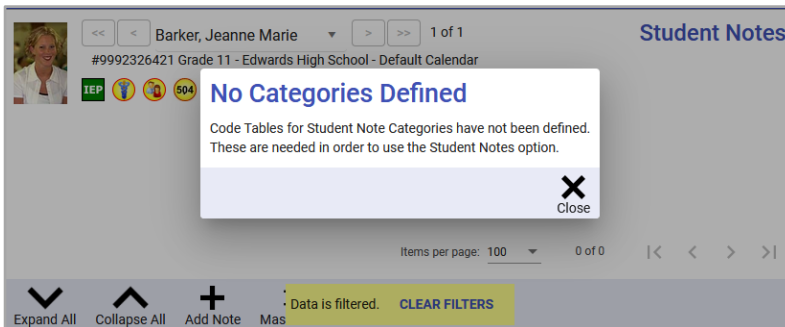
In 360: **Management > Staff > Permission Groups**

To view notes, a user must have the permission **General Operations > View Student Notes**.

To add or edit notes, a user must have the permission **General Operations > Maintain Student Notes**.

Prerequisite – Add/Edit Student Note Categories

In order to use the Student Notes feature, user defined note categories must be established, otherwise an error displays.



Add/Edit the Categories

1. Choose **Menu icon**  > **Utilities > Code Tables**.

2. Scroll to and select **Student Note Category**.

Code Tables

Name ▼ ↑	Category ▼	Type ▼	Exclusive to 360 ▼	Actions
Street Direction	Registration/EnrollmSystem		Y	⋮
Street Type	Registration/EnrollmSystem		Y	⋮
Student Note Category	Student	System	Y	⋮
Targeted Program	Courses	State Reporting	Y	⋮
Teacher Role	Courses	State Reporting	Y	⋮
Term Type	Courses	System	Y	⋮
Termination Reason	Staff	State Reporting	Y	⋮

Edit Codes

+ Add

3. Select the **Actions icon > Edit Codes**. The Code Table for the Category displays.

Student Note Category

Code ▼	Description ▼	Display in Student Notes Popup? ▼	Only display once per session? ▼	Default ▼	Inactive ▼	Actions
Academic	Awards					⋮
Behavior	Behavior related Notes	Y	Y			⋮
Safety	Security	Y	Y			⋮

+ Add Code

Edit
Delete

4. Select **Add Code** (or **Actions > Edit** for existing codes).

Add Code

Code*
Safety

Description
Security Note

Display in Student Notes Popup?

Only display once per session?

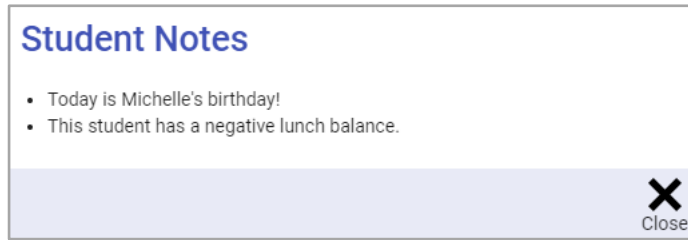
Default

Inactive

✓ Save ✗ Cancel

- **Code** – Create a unique code (e.g., Safety).
- **Description** – Enter the description (e.g., Security)

- **Display in Student Notes Popup** – When the Student Summary page is accessed, if the student has any notes which have been assigned a category where this setting is checked, a popup will be displayed showing those notes:



In the 2022.1 upgrade, this will be changed so the popup shows when any student-specific page is accessed, not just the Student Summary page.


If this setting is NOT checked, the note is only visible on the Student Notes page.

- **Only display once per session** – If this is checked, notes assigned this category will only show in the popup the first time a user accesses a student-specific page for a student. Accessing other student-specific pages for this same student or returning to the current page will not cause the note to be displayed again. This remains true as long as the user stays logged in. If they log out and back in, the trigger resets and the note will again show when a page for that same student is accessed.

For most categories, this should be checked. Otherwise, users may become annoyed at having to see the same message over and over as they switch between pages for a student.

- **Set as Default** – Check to make this category appear as the default category when notes are added.
 - **Inactive** – If checked, the category is not available for use when new Notes are added but remains in previously created notes.
5. Choose **Save**.
 6. Continue adding Categories or select **Close**.

Add a Student Note

NOTE: The **Attendance** screen and the **Gradebook > Scores** screen provide **Mass Tools**  **Mass Add Student Notes** that allows you to post a pertinent note to multiple students in the selected gradebook.

1. Select **Menu > Students > Student Notes**.

- The Student Search window displays.

Student Search Searching students available in Academic Year 2020-21 Recent Students

Last Name First Name Student # School: Edwards High School Status: Active

Student #	First Name	Last Name	Grade	Birth Date	School	Homeroom Teacher	State ID
197154	Michelle	Barker	11	03/19/2003	Edwards High School		244538538
141639	Jeanne	Barker	11	01/16/2004	Edwards High School		673838874
135471	Levi	Bridger	12	08/10/2003	Edwards High School		541524869
185113	Coral	Bridger	10	05/27/2005	Edwards High School		832144657
148692	Storme	Broman	10	02/19/2008	Edwards High School		103209530

Items per page: 100 1 - 100 of 636

Start Over Student Filters Create Student List Cancel

- Select the name of a student or enter search criteria and select Search. Once a student is selected, the Student Notes window displays.

Student Notes Barker, Michelle "Shelly" Kay 5 of 669 #9995231641 Grade 11 - Edwards High School - Default Calendar

More	Student	Category	Note	Order	Status	Start Date	End Date	Display as Bold	Classroom Note	Actions
▼	Barker, Michelle "Shelly" Kay	Award	Bilingual debate award	2	Active	10/12/20	11/16/21			⋮
▲	Barker, Michelle "Shelly" Kay	Award	Mathalete competition citywide champion.	1	Active					⋮

Created By: Mathman, Jim (07/20/21) Last Edited By: [blank] (Last Edited On: [blank])
Note: Mathalete competition citywide champion.

Items per page: 100 1 - 2 of 2

Expand All Collapse All Add Note Mass Add Filter Data is filtered. CLEAR FILTERS

- To create a new note select **Add Note** from the bottom bar.

Add Entry - Barker, Michelle "Shelly" Kay [#9995231641]

Category*

Note* 1000 characters left

Order* Status* Active

Start Date mm/dd/yyyy End Date mm/dd/yyyy

Display as Bold
 Classroom Note (will be shown as an alert)

Save Cancel

- **Category** – Select from the available dropdown.

NOTE: If Display in Student Notes Popup was selected for the chosen category, the message **This note will appear in the Student Notes popup** will appear below the Category field as a reminder this note will appear in the popup.

- **Note** -- Enter the desired text.
- **Order** – This number determines where this note will be displayed in regard to any other existing notes.
- **Status** – Active is selected by default. Changing this to Inactive will prevent the note from being shown.
- **Start Date** – Enter the first date this note should be displayed. If this is left blank, the note will show immediately.
- **End Date** – Enter the last date the note should be displayed.
- **Display as bold** – If selected, the Student Note displays in bold font.
- **Classroom Note (will be shown as an alert)** – If selected, an alert will show for the student, indicating a note exists.

5. Choose **Save**.

Mass Add Student Notes

On the Gradebook and Attendance pages, the Mass Tools menu has an option to Mass Add Student Notes. This option works similar to the other Mass Tools options on these pages – select the option, then use the column of checkboxes that appears at the left side of the grid to select the desired students:

Student #	Student Name	Term-4 3/4-12	Sem-2	Year-0
<input type="checkbox"/>	Barker, Jeanne Marie			
<input type="checkbox"/>	Barker, Michelle Kay			
<input type="checkbox"/>	Brescia, Traci A			
<input type="checkbox"/>	Buerger, Carly R (P)		A 100%	50
<input type="checkbox"/>	Collins, Jeraka R (P)			
<input type="checkbox"/>	Curci, Christopher R (P)		F 0%	[0] MSNG
<input type="checkbox"/>	Djennaro, Summer M (P)		F 0%	[0] MSNG
<input type="checkbox"/>	Djogaj, Chris R (P)			
<input type="checkbox"/>	Fitzmaurice, Samuel M (P)		F 0%	[0] MSNG

Select Next to proceed to the window where the note can be entered:

Add Entry - [Multiple Students](#)

Category*
General

Note* This note will appear in the Student Notes popup
On a field trip with Mrs. Robertson's class on Friday, April 7.

Order* 1 Status* Active

Start Date End Date 937 characters left

Display as Bold

Classroom Note (will be shown as an alert)

Save Cancel


Viewing Student Notes

There are multiple places from which student notes can be viewed, but which notes are available in each place depends on the settings on both the note itself and the category assigned to it.

Remember – notes will only show for users who have permission to View Student Notes.

The Student Notes Page

To view/add/edit an individual student's notes, select **Menu > Students > Student Notes** then use Student Search (or Filters) to locate and select a student. The Student Notes window displays with any notes that have been entered by staff members who have access to that student. Select the More column Down/Up arrows to display/hide note details.



Barker, Michelle Kay 3 of 679
#9995231641 Grade 11 - Edwards High School - Default Calendar

Student Notes

More	Student	Category	Note	Order	Status	Start Date	End Date	Display as Bold	Classroom Note	Actions
▼	Barker, Michelle Kay	Academic	District-wide Math-athlete finalist	2	Active	12/01/21			Y	⋮
▼	Barker, Michelle Kay	Behavior	Mobile phone violation -3 week confiscation	1	Active	11/26/21	12/17/21		Y	⋮
▲	Barker, Michelle Kay	Safety	Family requests student has adult security walk-out to parkin...	1	Active	12/06/21	12/10/21	Y	Y	⋮

Created By: sdmadmin, sdmadmin Last Edited By: Last Edited On

Created On: 12/06/21


Note: Family requests student has adult security walk-out to parking lot this week

Items per page: 100 1 - 3 of 3

⏪ ⏩

Expand All
 Collapse All
 Add Note
 Mass Add
 Filter

Data is filtered. [CLEAR FILTERS](#)

Any of the entries can be edited by clicking in the cell to be edited (or **Actions** icon  > **Edit**).

Make any needed changes and select **Save** in the bottom bar.

If a student note was erroneously entered, select **Actions** icon > **Delete**. The Delete Note confirmation displays. Select **OK** to delete the note.

Delete Note

Are you sure you want to delete this Student Note?

✓
✗

OK
Cancel

Student Alerts

If the Classroom Note checkbox is checked on any of the notes for a student, the Notes alert icon will be shown in the student header:

Selecting any of the icons will display the Alerts window:

Alerts for Brooks, Tazshia

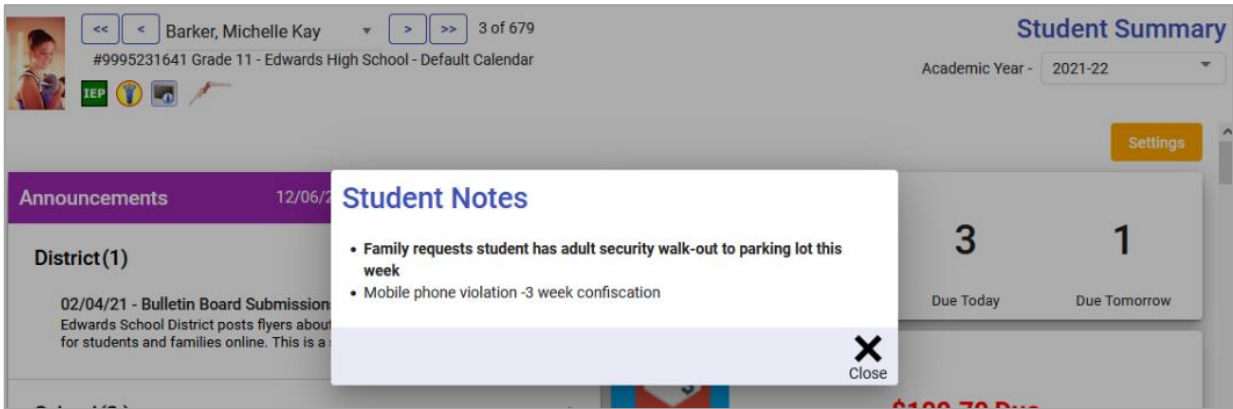
Alert	Description	Start	End
	Allergic Reaction - Alergic to rubbing alcohol causes rash	05/16/13	
	Headaches/chronic - OTC as needed	07/28/16	
	Family requests student has adult security walk-out to parking lot this week.	12/13/21	12/17/21

✗
Close

The Student Notes Popup

Select **Menu > Students > Student Summary** and select a student. The Student Summary displays a popup for any notes assigned a Category marked **Display in Student Notes Popup**.

If the Category assigned to a note has **Only display once per session** checked, that note will only show the first time this page is accessed for the student with whom the note is associated. This note will not show in the popup for this student again until the user logs out and back in.



The Student Notes Card

If the Student Notes card is being shown on the Student Summary page, selecting the **Go To Notes** button opens the Student Notes screen.

