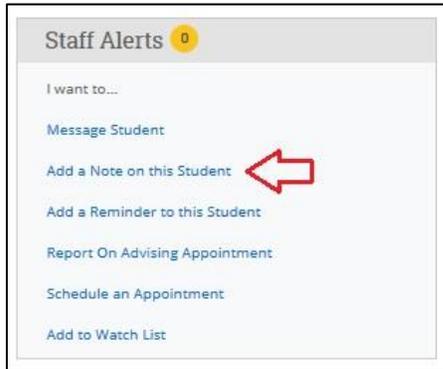


## CardSmart Training

### Adding a Note to a Student's Profile

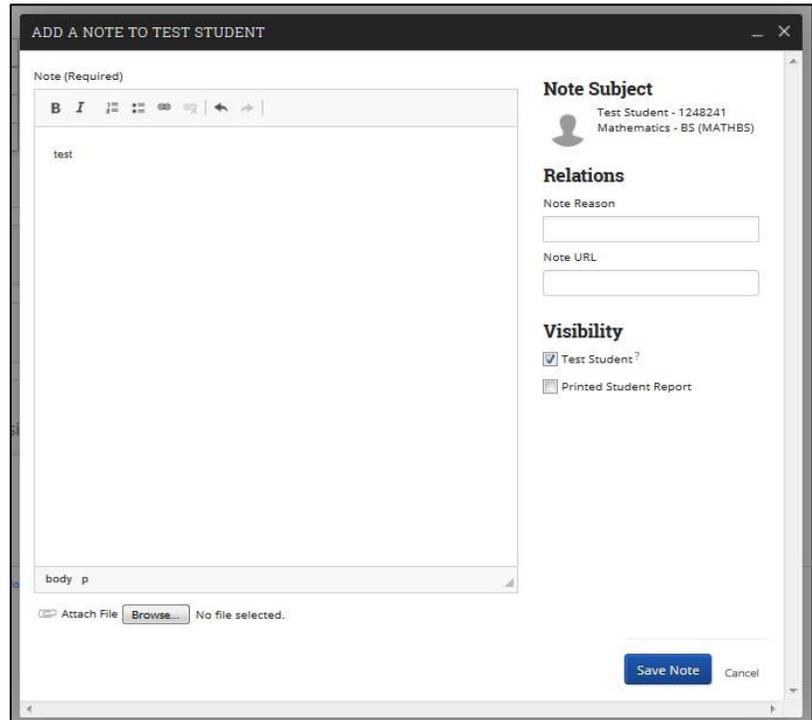
To add a note to the student's profile, select **Add a Note on this Student** under the Staff Alerts dialog box on the top right of the student profile.



**Fun Fact... What's a Note?**

Notes differ from advising reports in that they are used to capture information about a student that is not directly tied to the advising appointment. They can also be used to upload an attachment and link to external documents.

1. Enter the text of the note in the **Note (Required)** field.
2. To attach a document, click **Browse** and search for a file on your computer.
3. **Note Reason** is category used to differentiate types of notes.
4. You can use **Note URL** to link to any webpage or file on the web.
5. If you want the student to see the note, click the box next to the student's name under **Visibility**. Leaving this unchecked will make the note invisible to the student.
6. Once you have entered all information, select **Save Note** to add the note to the student's **Reports/Notes** tab. All notes on a student will be displayed together towards the top of this page on the student's profile. All notes created by anyone on a student's profile will appear here.



If you would like to use Task Tracking, enter the related values. NOTE: Task tracking does not affect the student's calendar. For example, entering a due date under task tracking will not add an entry to the student's calendar, nor will it send the student an email reminder.