

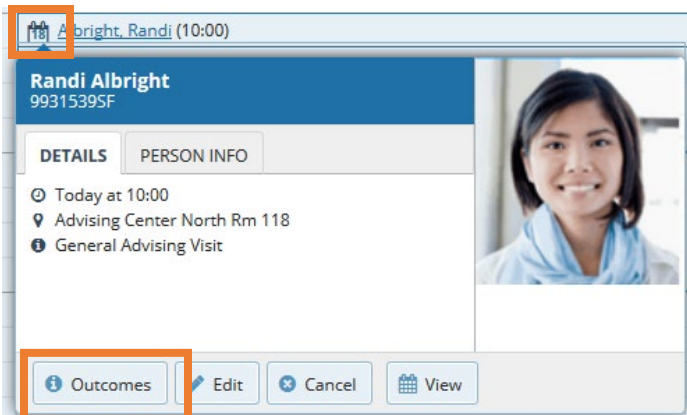
Adding Notes in MavCONNECT

There are two ways to add notes to a student's folder in MavCONNECT:

- [Appointment Notes](#)- Documenting an appointment that was scheduled with a student through MavCONNECT through the Outcomes button.
- [Ad-Hoc Notes](#)- You can also use MavCONNECT to capture a note directly on the Student Folder. Select the desired student from your student list, and click on the **Note** option from the action bar.

Adding an Appointment Note:

1. Hover over the appointment (calendar) icon associated with the desired appointment to open the appointments pop-up card. From that card, select the **Outcomes** tab from the menu to record outcomes from the meeting.



The screenshot shows the 'Add Appointment' form. The form has a header with the title 'Add Appointment' and two buttons: 'Never Mind' and 'Submit'. Below the header, there are three tabs: 'Scheduling', 'Outcomes', and 'SpeedNotes'. The 'Outcomes' tab is active. The form includes the following sections:

- Time:** A field for 'Actual Start Time' followed by 'to' and a field for 'Actual End Time'.
- Attendance:** A checkbox labeled 'Student missed appointment'.
- Email:** A checkbox labeled 'Send a copy of note to student'.
- Comments:** A text area for entering comments. Below the text area, there is a note: 'Comments are notes about the appointment, viewable only by you and other people with whom the appointment is shared. These notes can be edited only by you before or after the appointment for record-keeping purposes.'
- Permissions:** A section titled 'Permissions: People with the following roles may be able to see this appointment if they have a relationship with the student(s):'. It lists the following roles:
 - Instructor
 - General Counselor
 - Academic Leadership
 - Student Calendar Manager
 - Academic Support

At the bottom of the form, there is a 'More...' link and a 'Required fields' warning icon. The form also has 'Never Mind' and 'Submit' buttons at the bottom right.

Options within the Outcomes Tab

Provide Narrative Comments/Notes about the Meeting

2. Enter notes about the meeting in the **Comments** box to document what you and the student discussed, any action items or next steps etc. When submitted, this information will be saved with the appointment information as well as on the Notes tab within the Student Folder. Visibility of this information will be driven by the roles that have permission to view this type of appointment as well as by current relationships to the student. The roles who have permission to the appointment type are listed just below the comments box in the blue box with the heading "Permissions."

If appropriate, you can check the box to send a copy of the comments as an email note the student. Students do not have access to see these comments if you do not check this box.

Document a Student "No-Show"

Check the box labeled **Student missed appointment** to indicate that the student did not show up for the appointment. Click submit and this will trigger an email to the student regarding their no show.

SpeedNotes Tab

You can quickly record recurring Outcomes through the use of SpeedNotes. Each Appointment Type has a set of activities associated with it that can be 'checked off' on the **SpeedNotes** tab. The items on this tab, and the organization of these items may be unique to each appointment type, so you may not always see the same options on this tab.

The screenshot shows the 'Edit Appointment' form with the 'SPEEDNOTES' tab selected. The form has a title bar with 'Edit Appointment' and two buttons: 'Never Mind' and 'Submit'. Below the title bar are three tabs: 'SCHEDULING', 'OUTCOMES', and 'SPEEDNOTES'. The main content area is titled 'Check off the topics discussed and activities completed in this meeting.' and contains a list of activities organized into categories: 'Academic Advising', 'Career Advising', 'Counseling', and 'Other'. Each category has a list of activities with checkboxes. The 'Academic Advising' category has five activities, with 'Academic Status Concerns' and 'Reviewed Academic Plan' checked. The 'Career Advising' category has one activity, 'Career Exploration'. The 'Counseling' category has two activities, 'Adjustment to College' and 'Balancing Work/School'. The 'Other' category is empty. At the bottom of the form are two buttons: 'Never Mind' and 'Submit'.

Category	Activity	Checked
Academic Advising	Academic Status Concerns	<input checked="" type="checkbox"/>
	Discuss Study Skills	<input type="checkbox"/>
	Discussed Academic Goals	<input type="checkbox"/>
	Provide Academic Appeals Information	<input type="checkbox"/>
	Reviewed Academic Plan	<input checked="" type="checkbox"/>
Career Advising	Career Exploration	<input type="checkbox"/>
Counseling	Adjustment to College	<input type="checkbox"/>
	Balancing Work/School	<input type="checkbox"/>
Other		

3. After you have documented the outcomes of the meeting, click the **Submit** button to save this information with the appointment.

Adding an Ad-hoc Note:

1. Select a **Note Type** from the list presented on the Create Note screen. This list is based on your relationship to the student and the associated permissions for that role.

Current General Note Types:

Advising Note- Used by advisors to document notes and comments related to academic advising.

Email Sent- Used by advisors to document when emails were sent to students either through message feature in MavCONNECT (only viewable between sender and receiver) or outside of the system.

Instructor to Advisor Notes- Notes that are visible between course instructors and advisors

The screenshot shows the 'Create Note' interface. The 'Note Type' dropdown is open, showing three options: 'Advising Note' (selected), 'General Shared Note', and 'Prospective Student Note'. The 'Advising Note' description is 'Used by advisors to document notes and comments related to academic advising.' and it is marked as '*Disclosable under FERPA'. Below the dropdown, there are checkboxes for 'Send copy of note to yourself' and 'Send copy of note to student'. The 'Note Sharing' section has 'Shared' selected. A 'FERPA Notice' states: 'This note is disclosable to the student under FERPA'. A 'Note Permissions' section states: 'People with the following roles may be able to see this note if they have a relationship with the student(s):'. At the bottom, there are 'Never Mind' and 'Submit' buttons.

2. Once you have selected a note type, other roles who will be able to view this note on the student folder are listed in the blue box labeled "Note Permissions" beneath the Note Sharing settings. Only individuals with the roles listed who have a relationship the student will be able to view this note on the student folder. Be sure to keep the note "shared".
3. You also have the option to email a copy of the note to the student and to yourself by checking the desired "Send copy" check boxes. Students do not have any "view" permissions to notes added to their student folder this way. If you do not email the note to the student, they will not have access to it unless they request a copy of their academic records.
4. Click the **Submit** button to save your note.