## Add a Note to a Learner

This document focuses on adding a note to a learner via the Notes button at the bottom of the learner screens in the Enrolments, Applications, Enquiries and Learner Details modules within Portal.

A lot of set up is required to ensure correct administration of notes. Different note types can be made available to different parts of the system and users must be given the rights to View/Amend notes. This is all in carried out in the Core system prior to using the Portal.

Please note that 'Register Notes' are a completely separate function to the standard system notes described here. They are covered in detail in other Portal Help documents in the Registers section.

In this example the learner is located via Learner Details. Click the Notes button highlighted to access and add a new note.

| (2016/2017) Learner Details for Isabella Benson - 1663546 |                          |           |               |      |                |                     |               |               |         |               |  |
|---|--------------------------|-----------|---------------|------|----------------|---------------------|---------------|---------------|---------|---------------|--|
| Biographical En   | rolments Attendance Ti   | imetable  | QoE E         | xams | Application    | ns Health           | Groups        | Reviews       | Employm | nent Custom   |  |
| Title Miss  | Given Isabella           | Othe      | r             |      | Family B       | enson               | Prefe         | red Isabella  |         | Gender Female |  |
| Address   | Queensbridge Road        |           | ULN           |      |                | External?           |               |               |         |               |  |
|   | Moseley                  |           | Date of Birth | 28/1 | 2/1999         | Excluded?           |               |               | 1 C     |               |  |
|   |                          |           | Age           |      | 17             | Age at 31/0         | 8/16 16       |               |         | all           |  |
| (Town/City)   | Birmingham               |           | Personal Tuto | Abi  | Carter         |                     |               |               |         |               |  |
|   |                          |           | Tutor Group   |      |                |                     |               |               | (FILD)  | dillon 1      |  |
|   |                          |           |               |      |                |                     |               |               | 1 All   | WSWA /        |  |
| Postcode  | <u>B13 8QB</u>           |           | Lnr TMGs: Al  | s    | ALPS           | Coll                | ege           |               | 1 March | KENNE         |  |
| Other Addresses   | 1                        |           |               |      | _              |                     |               |               |         |               |  |
| Home Tel.   | 0121 444 7610            |           | School        | Bish | op Challoner   | RC School           |               |               |         |               |  |
| Mobile Tel.   | 07690 777888             |           | Ethnicity     | Whit | te - English / | Welsh / Scotti      | sh / Northerr |               |         |               |  |
| Personal Email  | elaine.nicholson@civica. | co.uk     | Nationality   | BRI  | TISH           |                     |               | Information I | Form A  | Address Label |  |
| Coll./Oth. Email  |                          |           |               |      |                |                     |               | Learner Agre  | eement  |               |  |
| ePortfolio ID   |                          |           |               |      |                |                     |               | Fee Summa     | шұ      |               |  |
|   |                          |           |               |      |                |                     |               |               |         |               |  |
| Emergency Co  | ontact Mrs Anna Benson   | Home      | 0121 444 761  | D    | Mobile         | e <u>08978 1766</u> | 15            | Daytime/Wo    | rk      |               |  |
|   |                          |           |               |      |                |                     |               |               |         |               |  |
|   |                          |           |               |      |                |                     |               |               |         |               |  |
|   |                          |           |               |      |                |                     |               |               |         |               |  |
|   |                          |           |               |      |                |                     |               |               |         |               |  |
|   |                          |           |               |      |                |                     |               |               |         |               |  |
| Contasta  | "Natas"                  | Decuments | Conoral Infr  |      |                |                     |               |               |         |               |  |
| - Contacts  | Notes Corresp.           | Documents | General Into  |      |                |                     |               |               |         |               |  |

Click the New button to add a note.

| Note Type       | All Note Types            | •               | Include Expired Not | es 🛛 | Notes I create | d only |       |
|-----------------|---------------------------|-----------------|---------------------|------|----------------|--------|-------|
| Created         | Created By                | Last<br>Amended | Ву                  | Туре | No             | te     |       |
| No Records Four | nd Matching Your Criteria |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
|                 |                           |                 |                     |      |                |        |       |
| Notes listed: 0 |                           |                 | Find                |      | New            | Select | Close |

Click on Note Type to select the appropriate category for the note.

## **REMS** Documentation



| Notes for Isabella Benson (1663546) |                       |       |                         |            |   |                  |  |  |  |  |  |
|-------------------------------------|-----------------------|-------|-------------------------|------------|---|------------------|--|--|--|--|--|
| Created                             | 10/01/2017            | Ву    | Alan Bradley            | Note Type  | Enrolment (LENR)  | $\sim$           |  |  |  |  |  |
| Last Amended                        | 10/01/2017            | Ву    | Alan Bradley            | Expires    | Attitude to Study (reference) (JATS)<br>Extenuating Circumstances (reference) (JEPA)<br>Maturity and Determination (reference) (JMAD)<br>Other Comments (reference) (JOTH)<br>Overall Attitude to Study (reference) (JOVR)  | ^ <sup>res</sup> |  |  |  |  |  |
| Late starter - Is                   | abella's family has j | ust m | oved to Birmingham from | Worcester. | Percentage Attendance (reference) (JPCA)<br>Percentage Punctually (reference) (JPU)<br>Potential and Suitability (reference) (JSUT)<br>L14 Learning difficulties and disabilities (L14)<br>L15 Disabilities (L15)<br>L16 Learning difficulties (L16)<br>Accident (JACC)<br>Behavioural (LBEH)<br>Employer Contact (LECO)<br>EMA (LEMA)<br>Enrolment (LETR)<br>Ennolment (LETR)<br>Ennolment (LETR)<br>Ennolment (LETR)<br>Learner Access Arrangements (LEXA)<br>Learner Access Arrangements (LEXA)<br>Learner Access Arrangements (LEXA)<br>Learner Access Arrangements (QEAT)<br>Exam Orders (QEEC)<br>Exam Access Arrangements (QELA)<br>Exam Orders (QEEC)<br>Exam Sections (QECC)<br>Exam Secting Student (QESS)<br>Exam Sitting (QEST)<br>Quick Note (QNOT)<br>Additional Support (SADS) | ~                |  |  |  |  |  |
|                                     |                       |       |                         |            | Email Staff Template Submit   | Back             |  |  |  |  |  |

- **Note Type:** Select the appropriate note type from the drop down list Learner Enrolment (LENR) in this example.
- **Text:** Type the content of the note into the body of the screen.
- **Expire:** Enter a date for the system to automatically 'expire' the note if required. Leave blank for note to remain on the system.

| (2016/2017) Learner Details for Isabella Benson - 1663546 |                                      |          |             |                 |                    |                 |              |                |              |               |  |
|---|--------------------------------------|----------|-------------|-----------------|--------------------|-----------------|--------------|----------------|--------------|---------------|--|
| Biographical  | Enrolments Attendance T              | imetable | QoE         | Exams           | Application        | 6 Health        | Groups       | Reviews I      | Employme     | nt Custom     |  |
| Title Miss  | Given Isabella                       | 0        | ther        |                 | Family Be          | nson            | Preferr      | ed Isabella    | 0            | Gender Female |  |
| Address   | Queensbridge Road                    |          | ULN         |                 |                    | External?       |              |                |              |               |  |
|   | Moseley                              |          | Date of B   | irth 28         | /12/1999           | Excluded?       |              |                | 0            |               |  |
|   |                                      |          | Age         |                 | 17                 | Age at 31/08    | /16 16       |                | 2            |               |  |
| (Town/City)   | Birmingham                           |          | Personal    | Tutor <u>Ab</u> | i Carter           |                 |              |                |              |               |  |
|   |                                      |          | Tutor Gro   | oup             |                    |                 |              | 4              |              | 10m 1         |  |
| Postcode  | B13 80B                              |          | Lor TMG     | e: ∆lie         | AL PS              | Colle           |              |                | ALL (        | ASAY A        |  |
| Other Addres  | ises                                 |          | CHI TWO     | a. 7413         | ALF 3              | Colle           | 90           |                | - l          | 020           |  |
| Home Tel.   | 0121 444 7610                        |          | School      | Bis             | shop Challoner     | RC School       |              |                |              |               |  |
| Mobile Tel.   | 07690 777888                         |          | Ethnicity   | W               | hite - English / V | /elsh / Scottis | h / Northerr |                |              |               |  |
| Personal Em   | ail <u>elaine.nicholson@civica</u> . | .co.uk   | Nationali   | ty BF           | RITISH             |                 |              | Information Fo | rm <u>Ad</u> | dress Label   |  |
| Coll./Oth. En   | ail                                  |          |             |                 |                    |                 |              | Learner Agree  | ment         |               |  |
| ePortfolio ID   |                                      |          |             |                 |                    |                 |              | Fee Summary    |              |               |  |
|   |                                      |          |             |                 |                    |                 |              |                |              |               |  |
| Emergency   | Contact Mrs Anna Benson              | Ho       | me 0121 444 | 7610            | Mobile             | 08978 17661     | 15           | Daytime/Work   |              |               |  |
|   |                                      |          |             |                 |                    |                 |              |                |              |               |  |
|   |                                      |          |             |                 |                    |                 |              |                |              |               |  |
|   |                                      |          |             |                 |                    |                 |              |                |              |               |  |
|   |                                      |          |             |                 |                    |                 |              |                |              |               |  |
|   |                                      |          |             |                 |                    |                 |              |                |              |               |  |
| 合 Contacts  | 📑 *NOTES* 🔁 Corresp. 📑               | Docume   | ents Genera | ıl Info         |                    |                 |              |                |              |               |  |
|   |                                      |          |             |                 |                    |                 |              |                |              |               |  |

Submit to save.

Once notes have been added to a learner in this way the text on the NOTES button appears in upper case. Folders and colours are used to indicate the following:

- NOTES in Red note is new and is less than 2 days old
- NOTES in Green note is guite recent and less than a week old
- NOTES in Black notes exist for this learner and are older than one week

Click on the NOTES button to view.

## **REMS** Documentation



|                   |            |                 |        | Note | Notes for Isabella Benson (1663546) |              |                |               |                      |            |       |  |  |  |  |
|-------------------|------------|-----------------|--------|------|-------------------------------------|--------------|----------------|---------------|----------------------|------------|-------|--|--|--|--|
| Note Typ          | All No     | ite Types       |        |      | ~                                   | 🗌 Inclu      | de Expired No  | otes          | Notes I created only |            |       |  |  |  |  |
| Created           | Created By | Last<br>Amended | Ву     | Туре | Note                                |              |                |               |                      |            | 3     |  |  |  |  |
| <u>10/01/2017</u> | ABRARE     | 26/01/2017      | ABRARE | LENR | Late starter -                      | lsabella's f | amily has just | moved to Birn | ningham from         | Worcester. |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |
| Notes listed:     | 1          |                 |        |      |                                     |              | Find           | Delete        | New                  | Select     | Close |  |  |  |  |
|                   |            |                 |        |      |                                     |              |                |               |                      |            |       |  |  |  |  |

The system now displays the following details:

- Created Date
- Created By
- Last Amended Date
- Last Amended By
- Type of note
- First line of text

## **Pushpins**

In other Portal screens where learners appear in lists (e.g. in Staff, Courses, Groups, Registers) the note appears as a pushpin attachment with a coloured top – colours to indicate how old the note is as described above. Click on the pin to view the note.

| Register Marking   |                    |       |         |              |               |             |             |             |                          |             |   |  |  |
|--|--------------------|-------|---------|--------------|---------------|-------------|-------------|-------------|--------------------------|-------------|---|--|--|
| Alan Bradley   |                    |       |         |              |               |             |             |             |                          |             |   |  |  |
| Register 1ASCHE-D-609 Chemistry AS One Year              |                    |       | Session | 1 25 20/01/2 | 2017 Fri      | 17:00       |             |             |                          |             |   |  |  |
| Add a learner to register No Learne                      | rs 20 Room         | 123B  | >       | Re           | gister (Heade | er) Notes   |             |             |                          |             |   |  |  |
| Learner ID Nt HW Family Name                             | Given Name         | 9 Dec | 16 Dec  | 6 Jan        | 13 Jan        | Last Period | Mark        | Auth Reason | Notes                    | Mins Late   | × |  |  |
| 1663529 Allinson   | Sophia             | 1     | 1       | 1            | 1             |             | ~           | None        | ~ >                      |             |   |  |  |
| 1663514 Arden  | Rebecca            | 1     | 1       | 1            | 1             |             | #           | None        | >                        |             |   |  |  |
| 1663481 🖤 🛒 Armitage                                     | William (Will)     | 1     | 1       | 1            | 1             |             | ~           | None        | ~ >                      |             |   |  |  |
| 1663501 but Baker  | Michael (Kayleigh) | 1     | 1       | 1            | 1             |             | ~           | None        | >                        |             |   |  |  |
| 1663498 Barkeley   | Joanne             | 1     | 1       | 1            | 1             |             | ~           | None        | >                        |             |   |  |  |
| 1663500 🥭 🔰 Bedford                                      | Lauren             | 7     | 7       | 7            | 7             |             | ~           | None        | <b>v</b> >               |             | 1 |  |  |
| <u>1663546</u> 🤌 🏓 Benson                                | Isabella           | #     | #       | #            | 1             |             | ×           | None        | <ul> <li>&gt;</li> </ul> |             | L |  |  |
| 1663488 Coleman  | Paul               | /     | /       | /            | 1             |             | ~           | None        | ~ >                      |             | 1 |  |  |
| 1663495 Collins  | Patricia           | 1     | 1       | /            | 1             |             | ~           | None        | >                        |             |   |  |  |
| 1663545 🖤 🗤 Dalton                                       | Evelyn             | #     | #       | /            | 1             |             | ~           | None        | $\checkmark$             |             |   |  |  |
| <u>1663496</u> 🕑 🖤 <sup>ise</sup> Douglas                | Lucy               | 1     | 1       | 1            | 1             |             | ~           | None        | $\sim$ >                 |             |   |  |  |
| 1663492 Eccles   | Peter              | 1     | 1       | 1            | 1             |             | ~           | None        | ~ >                      |             |   |  |  |
| 1663506 🍊 McDermott                                      | Dylan              | 1     | 1       | 1            | 1             |             | ~           | None        | $\sim$ >                 |             |   |  |  |
| 1663479 🖤 🚺 Mitchell                                     | Andrea             | 1     | 1       | 1            | 1             |             | ~           | None        | $\sim$ >                 |             |   |  |  |
| 1663412 Myers  | Angela             | 1     | /       | 1            | 1             |             | ~           | None        | >                        |             |   |  |  |
| 1663505 Oliver   | Jason              | 1     | 1       | 1            | 1             |             | ~           | None        | $\sim$ >                 |             |   |  |  |
| 1663497 but Pagett                                       | Nicola             | 1     | 1       | 1            | 1             |             | ~           | None        | >                        |             |   |  |  |
| 1663499 Scanlon  | Bridget            | 1     | 1       | 1            | 1             |             | ~           | None        | >                        |             | J |  |  |
| 1663515 Thorpe   | Gary               | 1     | 1       | 1            | 1             |             | ~           | None        | $\checkmark$ >           |             | * |  |  |
| Legend<br>Infill Withdrawn Transferred Non Enrolled Comp | lete Present 0     |       |         |              |               |             | Destination | Mail All Er | mail All SMS All         | Submit Back |   |  |  |