

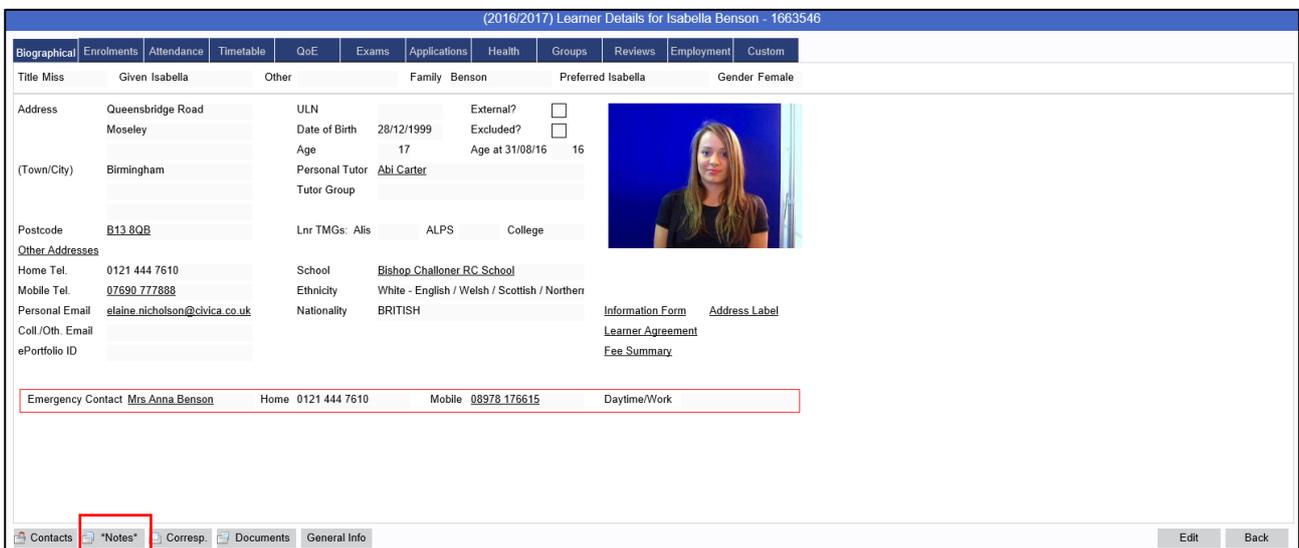
Add a Note to a Learner

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.

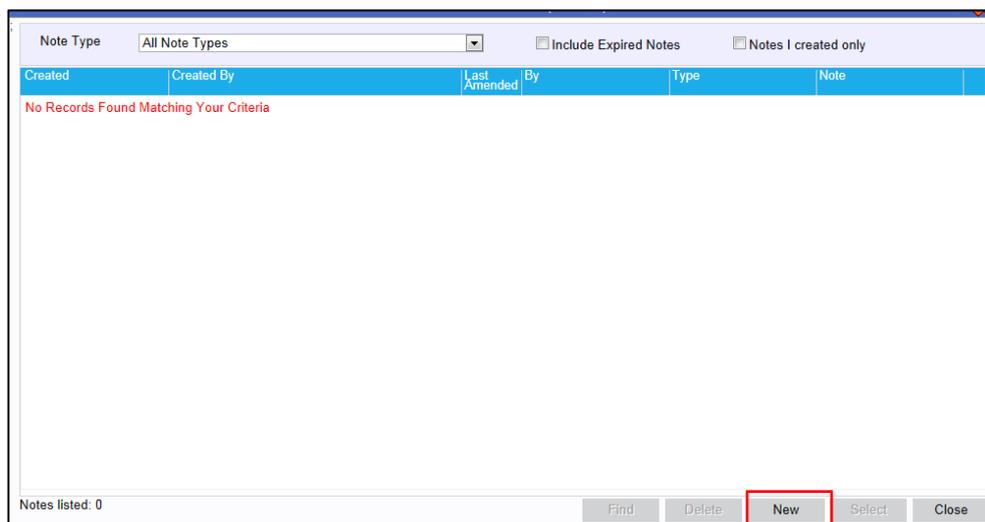
A lot of set up is required to ensure correct administration of notes. Different note types can be made available to different parts of the system and users must be given the rights to View/Amend notes. This is all in carried out in the Core system prior to using the Portal.

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.

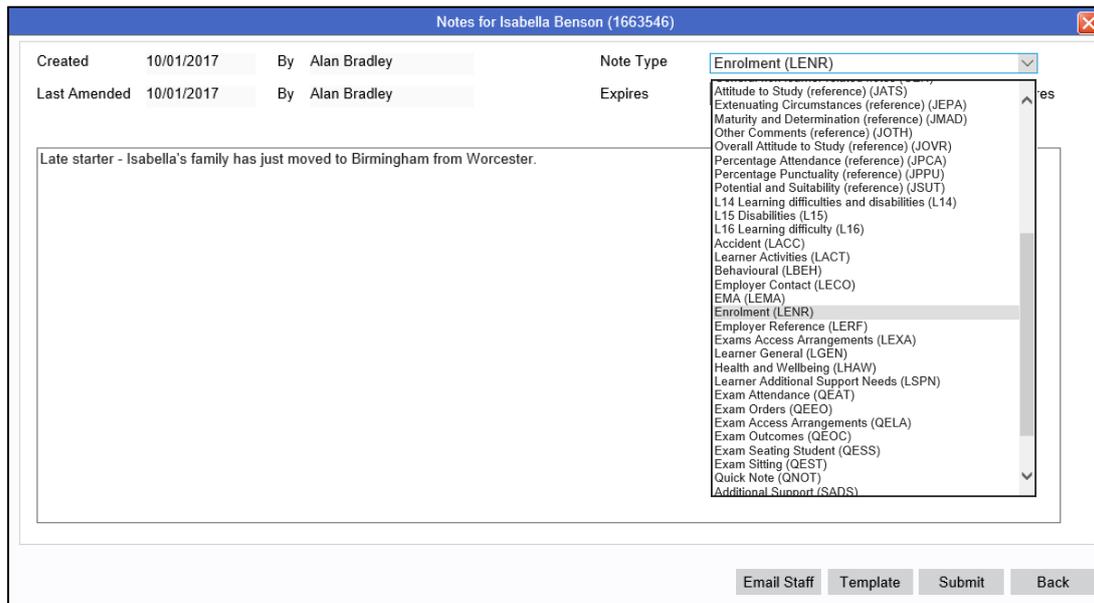
In this example the learner is located via Learner Details. Click the Notes button highlighted to access and add a new note.



Click the New button to add a note.

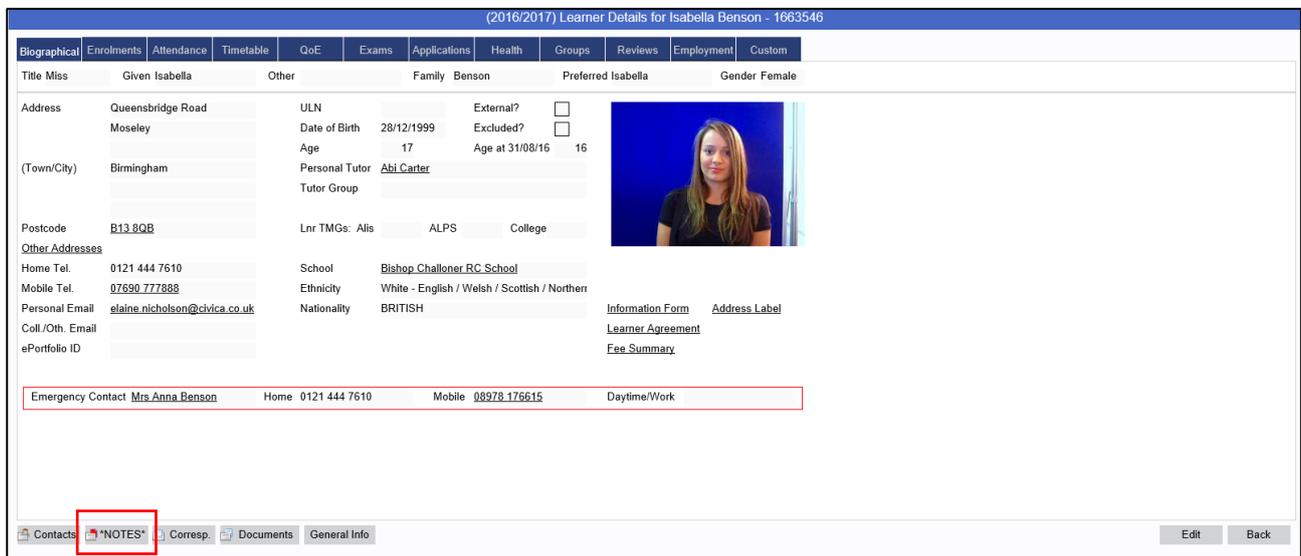


Click on Note Type to select the appropriate category for the note.



- **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.

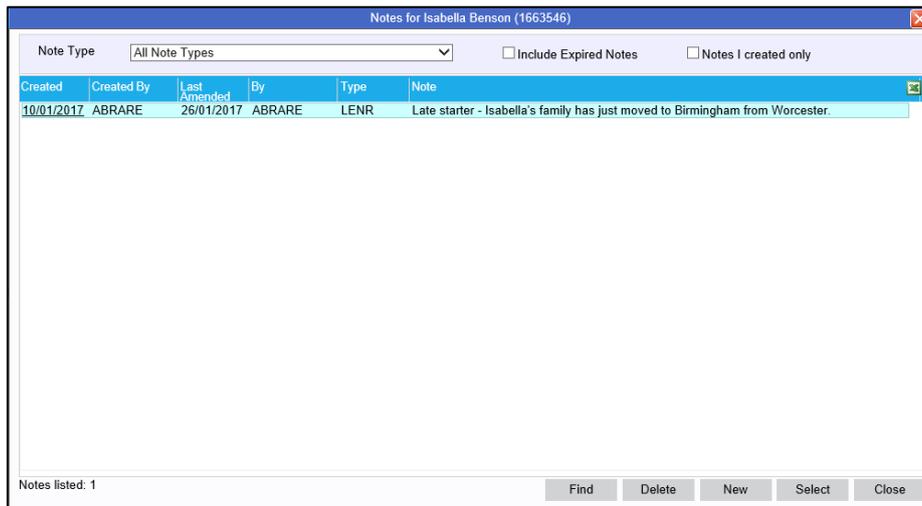
Submit to save.



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 quite 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.



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 25 20/01/2017 Fri 17:00														
Add a learner to register No Learners 20 Room 123B Register (Header) 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	/	/	/	/			None			
1663514			Arden	Rebecca	/	/	/	/		#	None			
1663481		♥	Armitage	William (Will)	/	/	/	/			None			
1663501		♥	Baker	Michael (Kayleigh)	/	/	/	/			None			
1663498		♥	Barkeley	Joanne	/	/	/	/			None			
1663500		♥	Bealord	Lauren	/	/	/	/			None			
1663546		♥	Benson	Isabella	#	#	#	/			None			
1663488			Coleman	Paul	/	/	/	/			None			
1663495			Collins	Patricia	/	/	/	/			None			
1663545		♥	Dalton	Evelyn	#	#	/	/			None			
1663496		♥	Douglas	Lucy	/	/	/	/			None			
1663492		♥	Eccles	Peter	/	/	/	/			None			
1663506		♥	McDermott	Dylan	/	/	/	/			None			
1663479		♥	Mitchell	Andrea	/	/	/	/			None			
1663412			Myers	Angela	/	/	/	/			None			
1663505			Oliver	Jason	/	/	/	/			None			
1663497			Pagett	Nicola	/	/	/	/			None			
1663499			Scanlon	Bridget	/	/	/	/			None			
1663515			Thorpe	Garv	/	/	/	/			None			

Legend: Infill Withdrawn Transferred Non Enrolled Complete Present 0

Destination Mail All Email All SMS All Submit Back