



EAB Starfish > Starfish Features > Communicating with Students

Q Search

Articles in this section

# Add a Note to the Student Folder



#### Kishana Reynolds

1 year ago · Updated

Follow

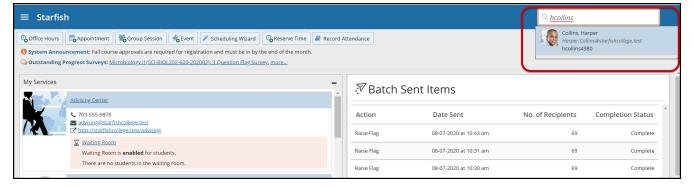
**Intro:** Adding a note to a student folder involves creating a concise record or comment related to a student's performance, behavior, or academic progress. These notes serve as a means of documentation and communication within educational institutions, helping instructors, advisors, and administrators to track and share important information about individual students for reference and decision-making. It's a way to maintain a comprehensive record of a student's journey and provide insights for better support and guidance.

## In This Article

- Bulk Actions
  - What happens next?

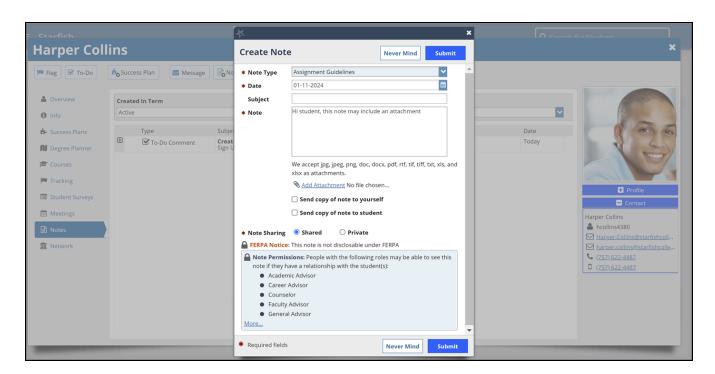
**Key Benefit:** One of the key benefits to choosing this option is you can share notes with other staff members.

1. Use the Quick Search to select a student.



#### 2. Select Note.

- 3. Select a **Note Type**. The information you find in the **Note Type** drop down is based on your relationship to the student and the associated permissions for that role. Attachments are available for certain Note Types, depending on how your institution configures them. Currently, you can only add one attachment to a note. The attachment maximum is 25MB. We accept .jpg, .jpeg, .png, .doc, .docx, .pdf, .rtf, .tif, .tiff, .txt, .xls, and .xlsx as attachments.
- 4. Enter a date in the **Date** field to represent when the note was created.
- 5. (Optional)Enter a **Subject** for the note.
- 6. Enter your note in the Note field.
- 7. (Optional) Select Send of note to yourself.
- 8. (Optional) Select **Send copy of note to student**. 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.



**Tip:** The **Note Permissions** display once you've selected a **Note Type**. The **Shared** option allows users with the roles listed who have a relationship with the student view the note of the student folder. When the **Private** option is selected only you can access the Note (unless you select Send copy of note to student.)

#### 6. Select **Submit**.

**Important:** Copy and paste this line to create a note call out box. Use this to replace the Note, Tip, Recommend, and Key Concept boxes in Starfish articles.

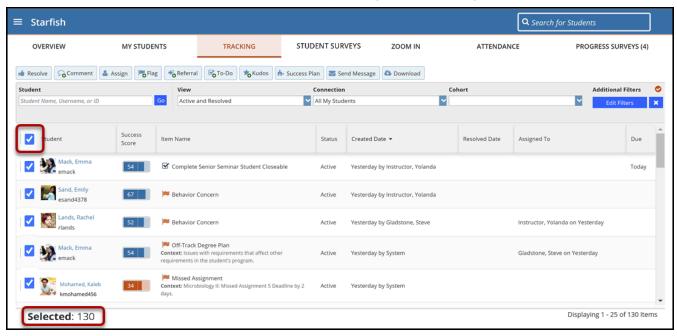
**Note:** Read receipts must be enabled for your environment to identify when a student has read your email. This feature is only available for emails created in Starfish by using the **Note** button, or the **Message** button within the *Student Folder*.

### **Bulk Actions**

You can perform bulk actions when interacting with students by using the **Select All** feature. The **Select All** maximum is 15,000 students or items. If you reach this limit, you will be prompted to adjust your filters before making a selection.

**Caution:** When sending ~5000 notes or meetings at once, these items could take upwards of 24 hours to finish sending. When these items are sent in large batches and the job gets interrupted, the interruption could cause duplicate emails to be sent. Therefore, we recommend sending notes or meetings in smaller batches.

- 1. When using Select All, consider that you may have different role permissions for different students. For example, you may need to choose a Role from the Connection drop down menu to raise certain Flags or create certain Notes.
- 2. From the My Students, Tracking, or Student Surveys page, check the Select All checkbox to select all students that meet your search criteria. You'll notice at the bottom of the page the total number of students that have been selected.



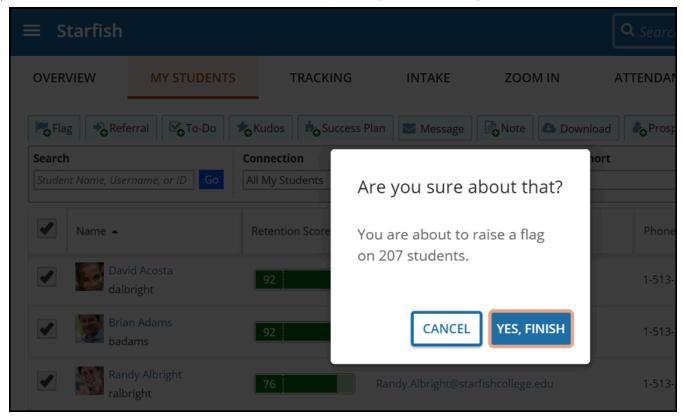
3. Perform your bulk action such as add a note or raise a flag, etc. Keep in mind, you can only perform bulk actions based on permissions set by your Starfish Administrator.

**Tip:** If these tracking item buttons do not display on the Student List, please contact your Starfish Administrator to add the Bulk Actions on Students privilege set.

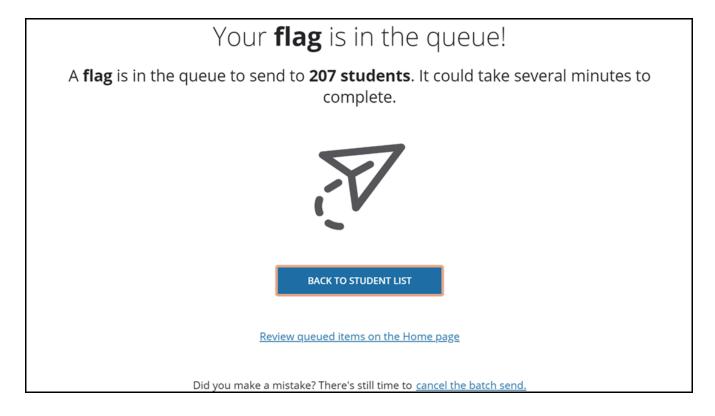
**Tip:** When you want to select multiple students then apply an Additional Filter, we recommend adding the Additional Filter criteria first. This will retain your filter settings. If desired, you could then narrow down your results further by selecting the View, Connection, Term, or Cohort drop down. (Note: The My Students and Tracking tabs, have slightly different drop down options.)

If you have selected less than 50 students the system will process your request immediately. If you have selected 50 or more students, the system processes the selection as a batch action to avoid system performance issues.

4. If you selected 50 or more students you will receive the following confirmation page. Select **Yes, Finish** to confirm your selection.



Next, you will receive the following message indicating your batch action has been queued.



## What happens next?

There are several options you can do next:

- Back to Student List upon selection your batch request begins and you are returned to the My Students page.
- Review queued items on the homepage upon selection your batch request begins and you
  are directed to the Home page where you can track the status of the action(s) in the Batch
  Sent Items widget.
- Cancel the batch send upon selection your batch send job is canceled. No action has
  occurred.

**Note:** Batch jobs may take some time to complete. Be sure to check the queue on the Home page to monitor the progress.

**Tip:** If you remain on this page and the computer is idle for 2 minutes, the page automatically refreshes, the batch job begins to process, and you are returned to the student list.

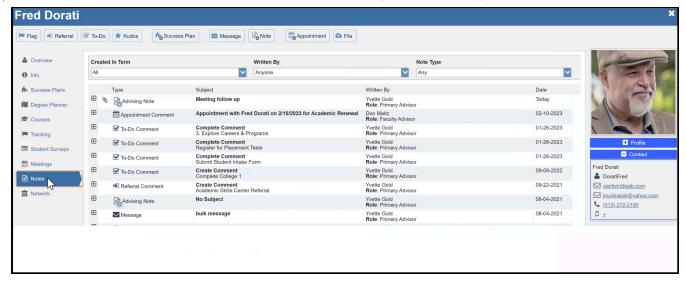
## **Locating and Managing Notes**

## **Staff Experience**

You will get an email from Starfish where you can review the note, and will be instructed to log into Starfish to access any attachments.

To locate notes:

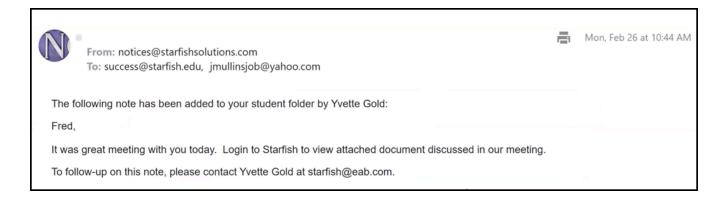
- 1. Within Starfish, locate the student using the Quick Search (or other method).
- 2. Click on the **Student Name** to open the Student Folder.
- 3. Select the **Notes** menu option. Notes that have attachments display a paperclip icon next to the note.
- 4. Click the **Expand** icon to view the note and access any attachments based on your permissions.



### **Student Experience**

An email will be sent to the student where they can review the note, and will be instructed to log into Starfish to access any attachments.

- 1. Within Starfish, select the hamburger menu then select **Messages**.
- 2. Click to open the appropriate note. The note and attachment (if applicable) is displayed.



Was this article helpful?

Yes

No

0 out of 0 found this helpful

Have more questions? Submit a request

Return to top ^

### **Recently viewed articles**

Notes Tab

Sample Starfish Resource Pages

**Training Materials for Staff** 

Other Documents

Quick Reference Guides

### **Related articles**

**System Announcements** 

SMTP Configurations FAQ and Troubleshooting

**Tracking Items Overview** 

**Email Students from Starfish** 

Comments			
0 comments			
2			

Be the first to write a comment.

**EAB Starfish** 

Privacy Policy | Terms of Use