Catalyst Integration: Adding Notes

1. Go to canopy.uc.edu and log-in with your UC username and password.
2. Under Tools on the left-side of the page, click Starfish.
3. There are multiple places that an advisor can add a note for a student. If the note is related to a Starfish Appointment, we encourage advisors to use the Appointment Outcomes feature (see guide on Starfish Help Website for more information). If the note is not associated with an appointment scheduled in Starfish and an advisor needs to just add a general note, there are multiple ways to access the adding note screen.
   a. A note can be added by selecting the Note button at the top of the student folder. It does not matter what tab is active in the folder, the Note button will be available.
b. When searching for students in the Students page (which is always accessible by selecting the menu icon in the upper left corner), an advisor can select the student (or multiple students) and select the **Note** button at the top of the page.

c. Any time an advisor hovers over a student's name, the following dialog box will appear and the advisor can select the **Note** button to add a note.

4. Once the **Create Note** box is open, there are several fields to be completed. The first field will be **Note Type**. The Note Type will be limited to the advisor's association to the student.
5. The **date** will automatically populate with the current day's date.
6. Write a **subject** that describes the contents of the note.
7. The **Note** field will contain the contents of the note. Make sure to follow proper noting guidelines when typing student notes.
8. The advisor can choose to send a copy of the note to themselves and/or the student via email. To do so, just check the appropriate box on the page.
9. All Notes must have the **Shared** radio button selected.
10. Once the note fields are completed, select the **Submit** button to finish the process. The note will immediately be available on the Notes tab of the Student Folder. The note will also be sent to Catalyst overnight and available to view there the next day.