|  |  |
| --- | --- |
| Adding a Family Profile Note | |
| *Before You Start*   * Notes entered in the Private Note field are visible to Managers but are not visible to the family. * There are no restrictions on which level of Manager may see the profile note. Notes added by Institution Managers may be seen and modified by County Managers that have access to the Family Profile, and vice versa. * Only the Manager that created the note may delete it from the family profile. * If the Send Email box is marked, the family will receive an email notification that the family profile has received a comment. The text of the Note is visible to the family in the email. The text of the Private Note is not available to the family in the email nor on the member’s profile, but they will still get an email that a comment was added. | |
| Steps   1. Click on Member in the navigation pane. 2. Search and select the intended member record. 3. Click on Member List in the navigation pane. 4. Click on Family in the navigation pane. | Screenshots  *(Screen appearance may vary per state)* |
| 1. In the Family Notes section, click the Add button. |  |
| 1. Check the Send Email box if you want to notify the member of this note. This is not a required field; but will email the family a copy of the public note. 2. In the Note Type field, select how the information was communicated. (Email, Other, Phone, Text) 3. Select the direction of the note (incoming or outgoing) 4. Enter the date of the note. 5. Enter the subject of the note. 6. If the note is to be visible to the family, enter the note into the Note field. 7. If the note should **not** be visible to the family, enter it in the Private Note field. 8. Click Save. |  |

|  |  |
| --- | --- |
| Adding a File to a Profile Note | |
| 1. Files may be uploaded to a note after the note has been saved. 2. Click on the note in the Family profile. 3. Click the Upload button. 4. Select the PDF file you wish to attach to the note. The file will save automatically. |  |
| Editing a Family Profile Note | |
| 1. Click on the note you wish to edit. 2. Modify the text of the note and/or private note as needed. 3. You may also delete a PDF file, replace it with a new file, or simply download the file. 4. Click Update to save the modifications.   NOTE: Modifications to the note do not trigger an email to the family. |  |
| Tips  If the profile note *only* contains a private comment, do not select the option to Send Email. | |