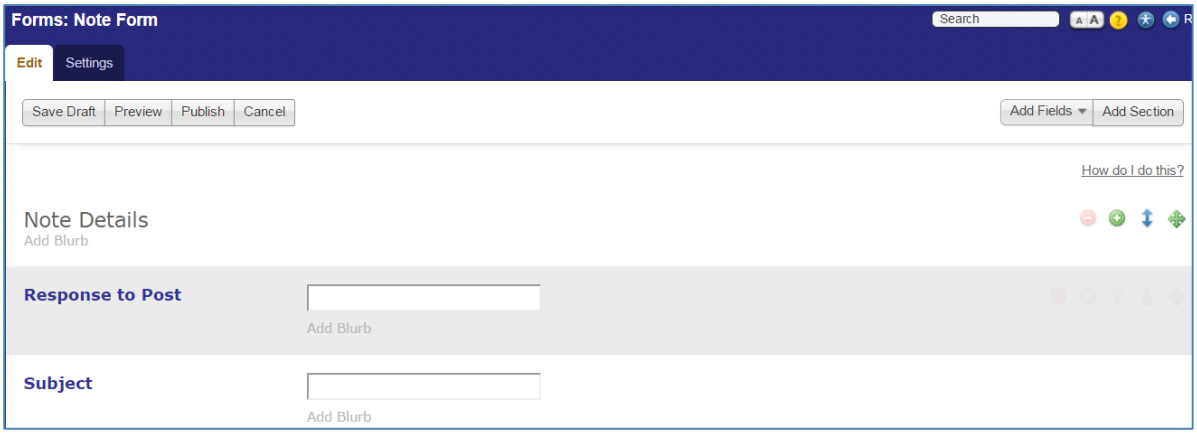
Notes provide a way for users to add additional information to Incident, Care, Security and Title IX cases after the original report is submitted. Notes can be added to a case as a single note, as a discussion thread, or from a "3rd party" who does not have access to the system. This document explains all features and functions of "Notes" to users of Advocate. It will cover the Note form, where and how Notes are added and organized, and user rights associated with Notes.

Note Form

The note form is a customizable form. To add additional fields you may edit the form under tools>forms>note form.

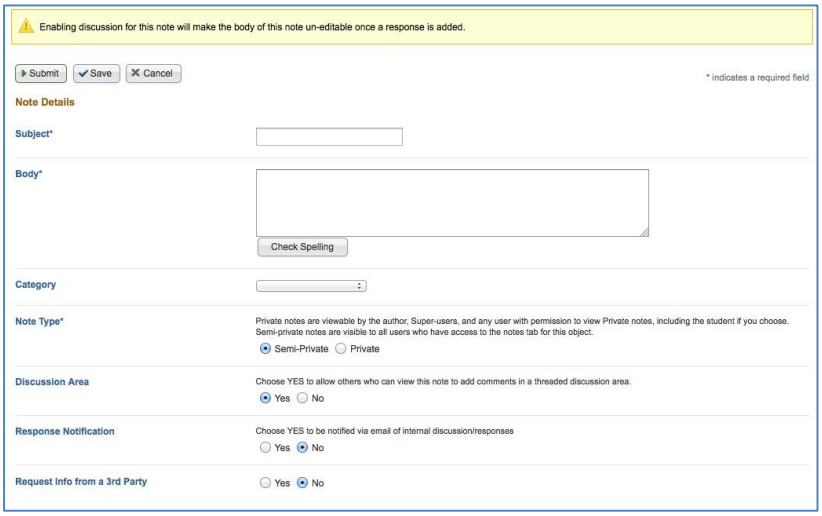


Adding Note

Notes can be added in conjunction with a number of different Record types throughout the system. Notes can be associated with Student Records (Employee Records as well in the case of GME), Student Groups, Incident Reports (including Legacy Reports), CARE Reports, CARE Action Plans, Security Reports, Title IX Reports, Trainings, and Missing Person Reports. Notes should be added to the record to which they are most pertinent.

A note tab will display within the object you are in. To add a note from within a record/report, select the "Notes" tab. Click "Add New Note."

Fill out the fields in the Note form according to the following guidelines:

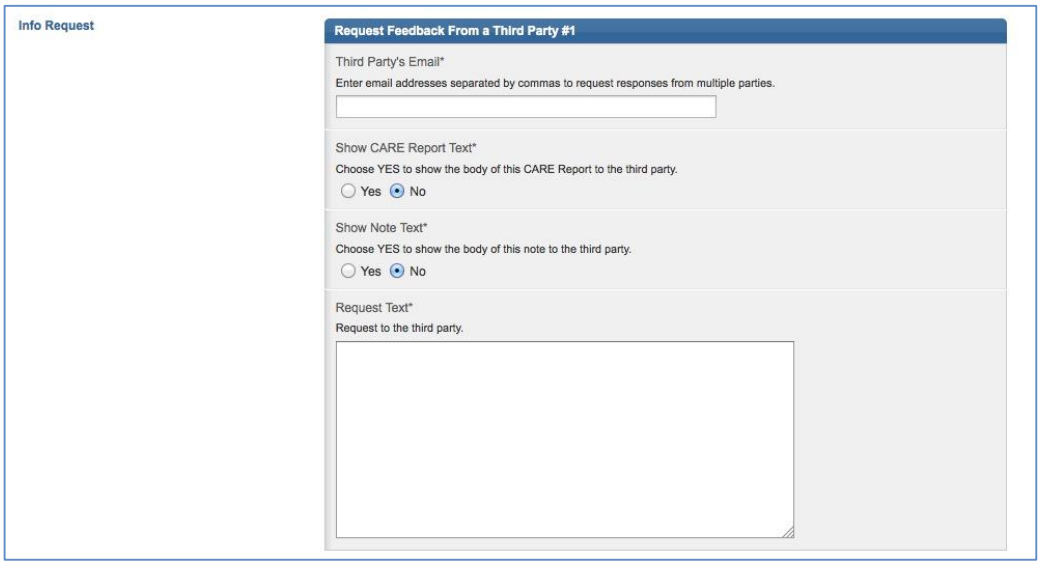


- **Subject**: Enter the note's Subject, to be shown to the users in the note list.
- **Body**: Enter the text body of the note, to be shown to users in the note list.
- **Category**: Users can create categories to help further describe the note. Note Category is a picklist whose values can be created/edited in Tools>Picklists>Note: Category.
- **Note Type**: Use this field to determine whether or not the note is semi-private or private. If semi-private, users with the Note (View) right can see the note. If marked "private," only users with the Note (View Private Notes) right can see. *The creator of the note will be able to see it regardless of note type selection.
- **Discussion Area**: If marked yes, this displays an area which allows users who have access to the note to add additional comments. It creates a discussion thread which allows users to add additional comments to this specific note. *Once the discussion thread is enabled the original body of the note is not able to be edited.
- **Response Notification**: Use this field to set whether or not the creator of the note will be sent notifications regarding note discussion/responses.
- **Request Information from a 3rd Party**: This field allows users to send an email to non-Advocate users and ask for additional information. You are able to send an email to one or more persons asking them to reply with any additional information. For more information see section below "*Request Feedback from a Third Party*."

Request Feedback from a Third Party

Advocate/GME has the ability to allow users to request information from a person who does not have access to the system. Users may send a request for additional information to one or more email addresses. When the request is made, the email address entered is sent a system message that asks the person to respond via a unique URL link. When the response is entered, it is attached to the same note from which the request is sent.

When users select yes to the "Request Information from a 3rd Party" field, a new field "Info Request" appears. Users are then required to enter data in the following fields:



- **Third Party's Email**: enter the email address(es) to which you want to send the request. Separate multiple addresses with a comma. You are able to add additional 3rd party responses if you need to customize the message for each one.
- **Show Incident/CARE Report Text**: this setting allows you to determine whether or not the original Incident/CARE report description is sent with the request.
- **Show Note Text**: this setting allows you to determine whether or not the body of the corresponding Note is sent with the request.
- **Request Text**: Use this text area to write out your request to the 3rd party email. This might include a personal message, additional instructions, etc.

Once you have filled out the required information, click Save or Submit to send the request to the email address(es) entered. When the 3rd party responds, a notification message ("3rd Party Response Submitted") will be sent to the report assignee and the author of the note, based on the report type (IR/CARE/Security/Title IX).

Quick Note Update to Reports

Advocate/GME provides the ability to "email" a note into the system and attach it directly to the associated IR, CARE, Title IX or Security report. This function provides a quick way for users to add notes from communication which may occur outside of the system.

Adding a quick note to a report requires the report number and sending an email. To use quick note you may either include the "quick note email" (see below for format) on a response to an email or send an email directly (in the "To" or "cc" email address fields) to the quick note email address. The "quick note email" form is: report number.<schoolname>@advocate.symplicity.com. The report number will be unique to the report and module to ensure the note is added to the correct are. Examples for each report type:

- For Incident Reports: 00001-001-2015.lead-demo-advocate@advocate.symplicity.com
- For CARE Reports: C00001-2015.lead-demo-advocate@advocate.symplicity.com
- For Security Reports: S00001-2015.lead-demo-advocate@advocate.symplicity.com
- For Title IX Reports: T00001-2015.lead-demo-advocate@advocate.symplicity.com

Once the email is sent, the email contents will generate a new note for the associated case. A system message will also indicate whether or not the email correctly synced with the system.

*Note: currently, the use of the Bcc function in your email is not supported.

System Messages Associated with Notes

There are several System Messages associated with Notes. These should be reviewed to ensure the desired information is included. To adjust these messages navigate to Tools>Templates>System Messages:

- 3rd Party Response Submitted (CARE Report Note)
- 3rd Party Response Submitted (Incident Note)
- 3rd Party Response Submitted (Security Report Note)
- 3rd Party Response Submitted (Title IX Report Note)
- CARE Report: New Note Added
- Security Report: New Note Added
- Title IX Report: New Note Added
- Note Create from Email Failed
- Note Created From Email
- Notification of Note Response
- Request Information from a third party

User Rights

When viewing the User Rights screen, you will notice that for each section Users can be given the

Right to Create, Delete, Edit, View Note, or View Private Notes. Look for these under each of the following.

- *Students>Notes*
- *Employees>Notes (GME Only)*
- *Student Groups>Notes*
- *Incident Reports>Note*
- *Security Reports>Notes*
- *CARE Network>CARE Report>CARE Report Notes*
- *CARE Network>CARE Action Plan>Notes*
- *Title IX Report>Title IX Report Note*
- *Training Manager>Training Notes*
- *Federal Reporting>Missing Persons>Missing Person Notes*