




Add Notes to Children and Families

Last Modified on 02/25/2025 4:20 pm EST


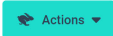
Add Notes to a child, contact, or family account. They are only visible to team members or other Owners and Administrators. Use Notes to:

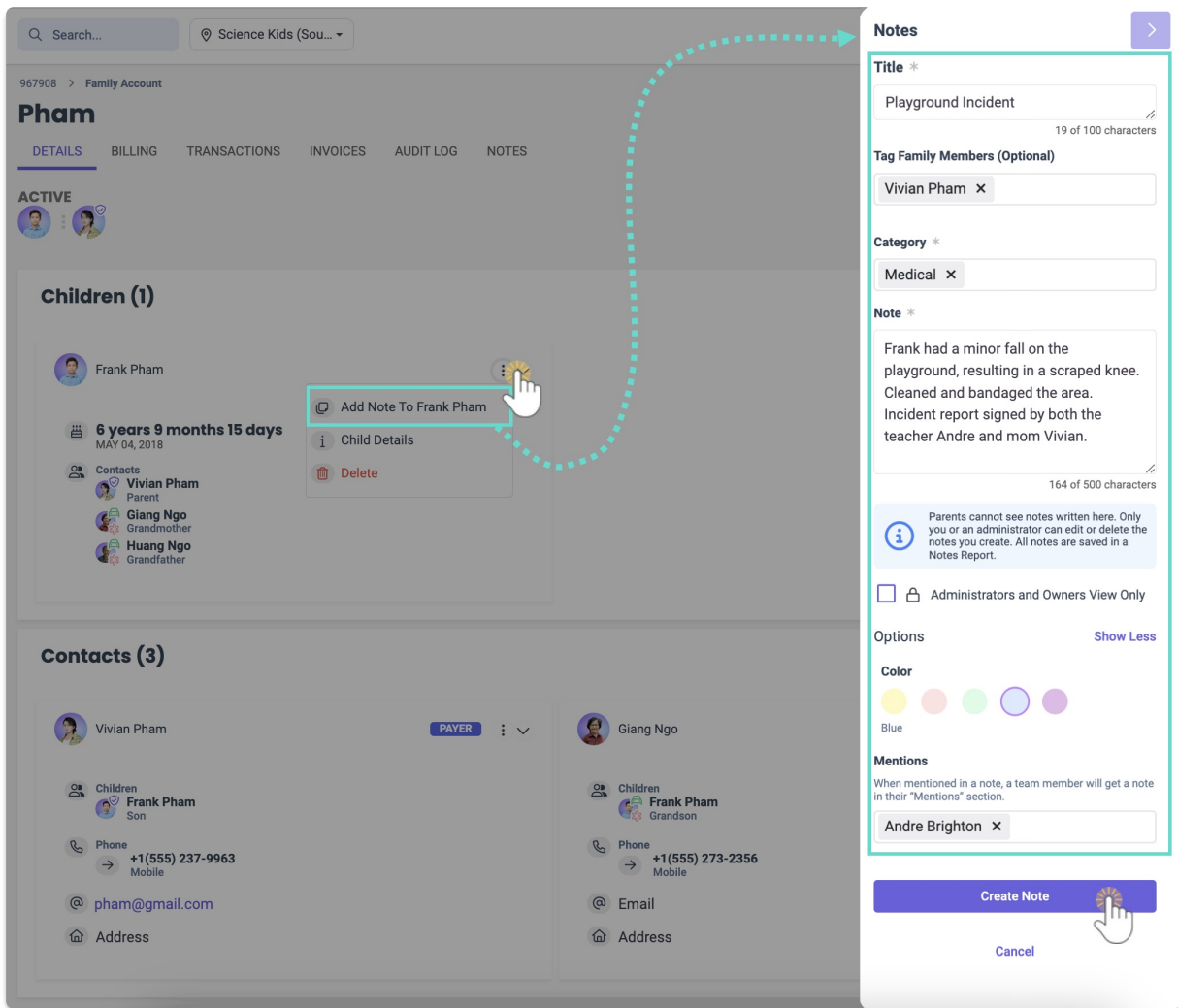
-  Inform other team members about a child's needs.
 -  Track family concerns and points of contact.
 -  Keep documentation of incidents within your childcare center.
-

Expand/Collapse All

Add a Note

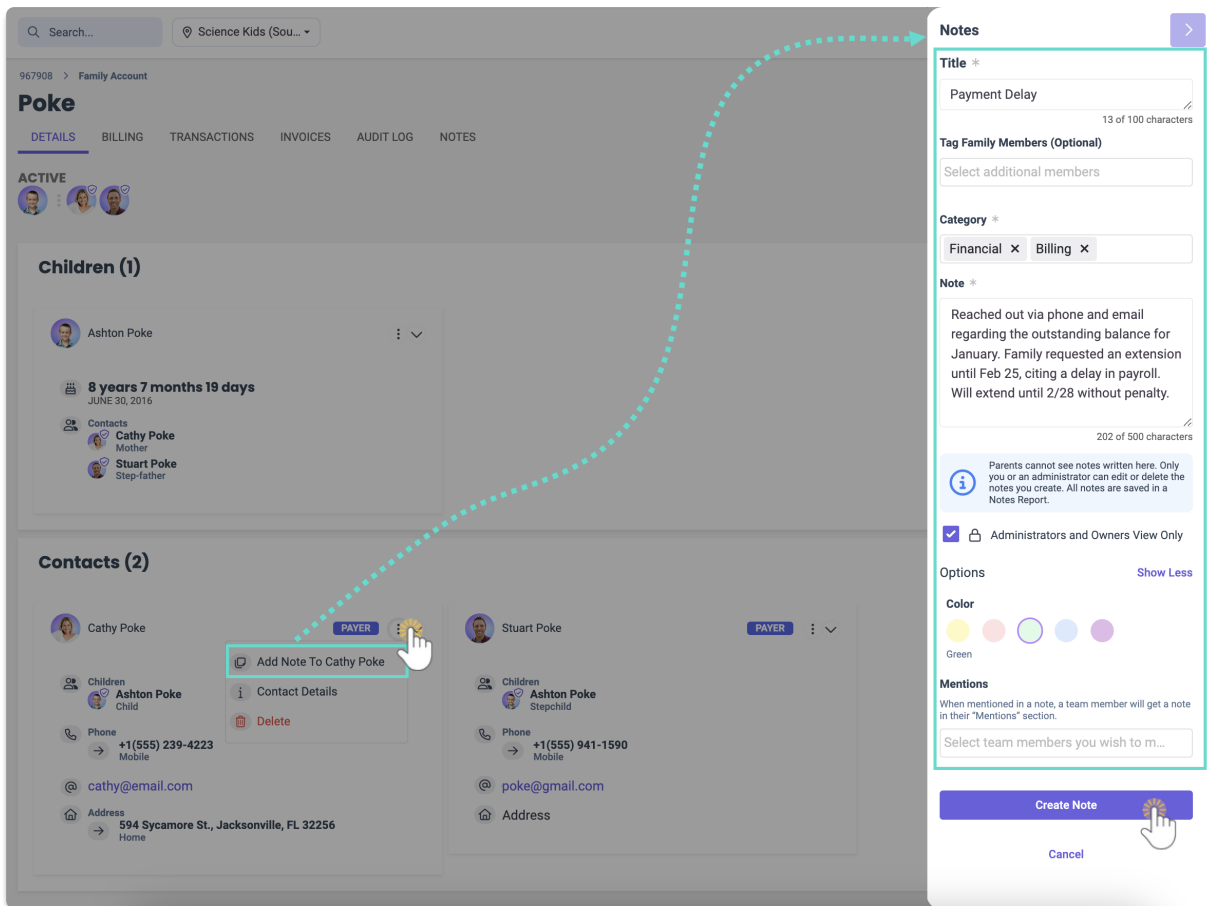
To a Child

1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**
 2. Locate and click the family name the child belongs to.
 3. Click the **Options** icon  > **Add Note to Child** on the child's contact card.
OR
Click the child and go to the **Actions** menu  > **Add Note to Child** if you are an Owner or Administrator.
 4. Complete the fields in the **Notes** drawer that opens on the right.
 - o **Title** - Enter a name for the Note.
 - o **Tag Family Members (Optional)** - Optionally select additional family members where the Note will display.
 - o **Category** - Select one or more tags to categorize the Note.
 - o **Note** - Write a description and any details you want to add.
 - o **Administrators and Owners View Only** - Select this box to allow only Administrators and Owners to view the Note.
 - o Click **Show More** to color-code the Note and mention additional team members if needed.
 5. Click **Create Note** when finished.
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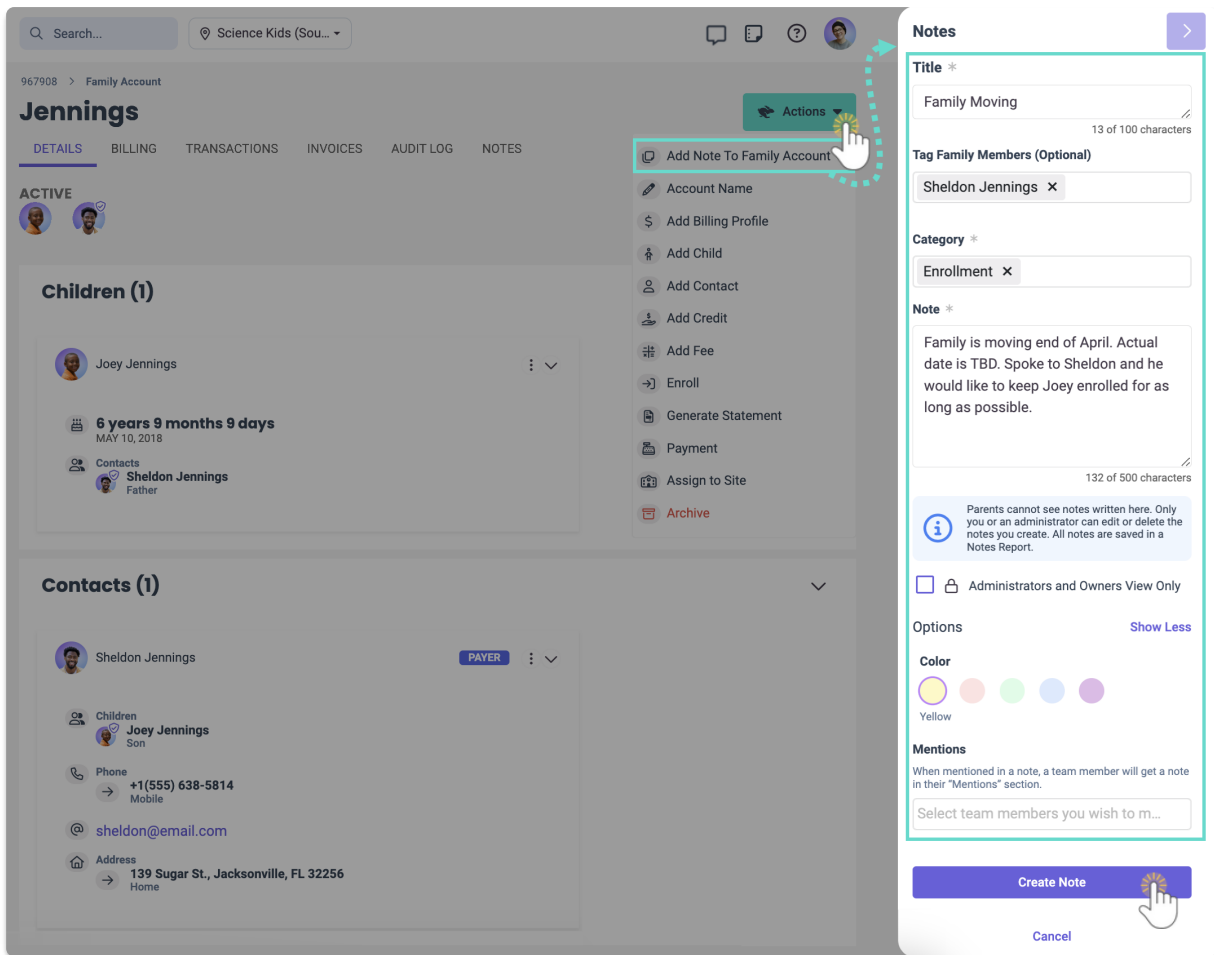
To a Contact

1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**
2. Locate and click the family name the contact belongs to.
3. Click the **Options** icon (⋮) > **Add Note to Contact** on the contact's card.
OR
Click the contact and go to the **Actions** menu (Actions ▾) > **Add Note to Contact**
OR
Go to a child's Contact's tab and click the **Options** icon (⋮) > **Add Note to Contact** on the contact's card.
4. Complete the fields in the **Notes** drawer that opens on the right.
 - **Title** - Enter a name for the Note.
 - **Tag Family Members (Optional)** - Optionally select additional family members where the Note will display.
 - **Category** - Select one or more tags to categorize the Note.
 - **Note** - Write a description and any details you want to add.
 - **Administrators and Owners View Only** - Select this box to allow only Administrators and Owners to view the Note.
 - Click **Show More** to color-code the Note and mention additional team members if needed.
5. Click **Create Note** when finished.







To a Family Account

1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**
2. Locate and click the family name.
3. Go to the **Actions** menu  > **Add Note To Family Account** if you are an Owner or Administrator.
4. Complete the fields in the *Notes* drawer that opens on the right.
 - **Title** - Enter a name for the Note.
 - **Tag Family Members (Optional)** - Optionally select additional family members where the Note will display.
 - **Category** - Select one or more tags to categorize the Note.
 - **Note** - Write a description and any details you want to add.
 - **Administrators and Owners View Only** - Select this box to allow only Administrators and Owners to view the Note.
 - Click **Show More** to color-code the Note and mention additional team members if needed.
5. Click **Create Note** when finished.



View Notes

Click the **Notes** icon  found on the top-right of the system to view all the Notes you have created. Then use the following features:

- Click the **My Mentions** tab to view Notes other team members have mentioned you.
- Use the **Filter** icon  to open a slide-out filter drawer on the right. This drawer allows you to filter Notes by *Color*, *Date*, *Family Members*, and *Staff Members*.
- Click the **Expand** icon  to view more details about all Notes on the page.
- Click the **Expand** arrow  on a single Note to expand it.

967908 > 208 > My Notes

My Notes

MY NOTES MY MENTIONS

Select All Date: Newest First Filters Date Range: 02/21/2024 - 02/21/2025

Feb 20, 2025 9:41 AM

Early Drop-off

Family Rentz Categories Other

Jack arrived 15 minutes early for Flora's drop-off. Natalie reminded him of the pre-arrival policy and he acknowledged the fee.

Family Members Mentions Created By

Jack Rentz Natalie Barrett sharris@sciencekids.com

Feb 20, 2025 9:41 AM

Feb 19, 2025 1:26 PM

Payment Delay


Family Poke Categories Billing Financial



You can also view Notes on a Family Account by clicking the Notes badge  on a child's or contact's card, or by selecting the Family Account's **Notes** tab. When viewing notes for a child or contact through the Notes badge, you can filter by *Category* or search for specific text within a Note.

Edit a Note

To edit a Note after you create it, follow these steps:

1. View the Note you want to edit.
2. Click the **Edit Note** icon  on the Note.

Note: The location of the icon will vary based on where you viewed the Note.

967908 > Family Account

Poke Actions ▾

DETAILS BILLING TRANSACTIONS INVOICES AUDIT LOG NOTES

Date: Newest First | Filters Date Range: 02/21/2024 - 02/21/2025

Feb 20, 2025 12:07 PM **Incident Report**
Family Poke Categories Medical

Feb 19, 2025 1:26 PM **Payment Delay**
Family Poke Categories Billing Financial

3. Make any edits to the Note using the fields in the *Notes* drawer on the right.
4. Click **Update Note** when finished.


Archived Notes

If you are an Owner or Administrator and no longer need a Note, you can archive it. Archived notes remain visible to Owners and Administrators only but can be restored at any time.



When you archive a Note, it is archived for all team members mentioned.

Archive a Note

1. View the Note you want to archive.
2. Click the **Archive Note** icon  on the Note.
Note: The location of the icon will vary based on where you viewed the Note.

967908 > Family Account

Rentz Actions ▾

DETAILS BILLING TRANSACTIONS INVOICES AUDIT LOG NOTES

Date: Newest First | Filters Date Range: 02/21/2024 - 02/21/2025

Feb 20, 2025 4:34 PM **Allergy Medication**
Family Rentz Categories Medical

Feb 20, 2025 9:41 AM **Early Drop-off**
Family Rentz Categories Other

3. Click **Archive** in the *Archive Note?* window to confirm.

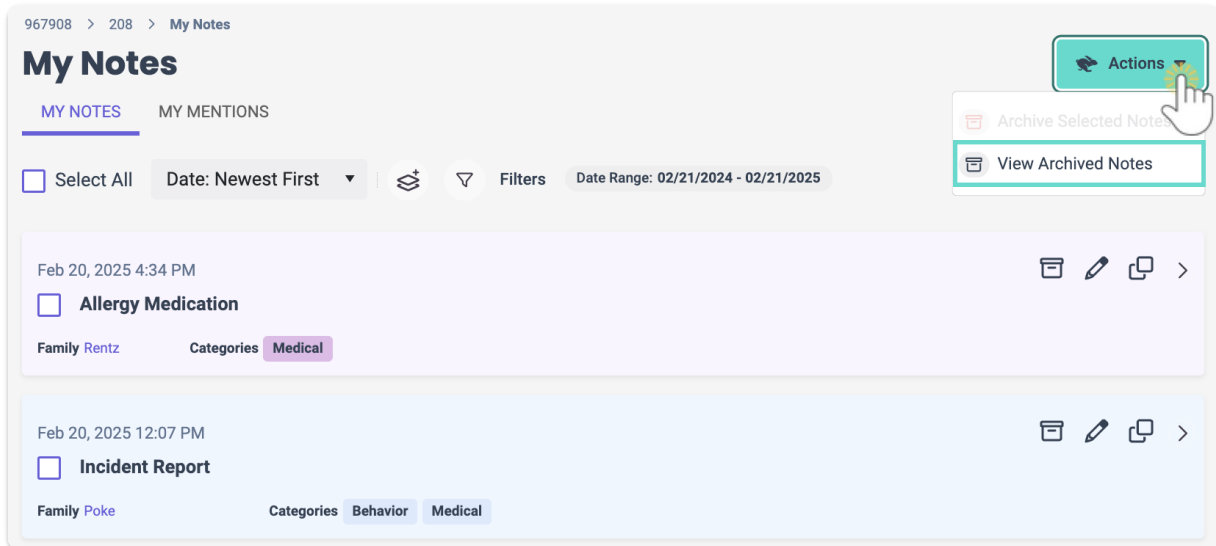


To archive multiple Notes at once, go to the **Notes** icon  at the top right of the system, select more than one Note using the checkboxes, and then go to the **Actions** menu




 > **Archive Selected Notes.**

View Archived Notes

1. Click the **Notes** icon  found on the top-right of the system to view all the Notes you have created.
2. Click the **Actions** menu  > **View Archived Notes.**






Reinstate an Archived Note

1. Click the **Notes** icon  found on the top-right of the system to view all the Notes you have created.
2. Go to the **Actions** menu  > **View Archived Notes.**
3. Select one or more archived Notes using the checkboxes, or use **Select All.**
4. Go to the **Actions** menu  > **Reinstate Notes.**

The screenshot displays the 'My Archived Notes' page. At the top, there is a breadcrumb trail: '967908 > 208 > My Archived Notes'. The main heading is 'My Archived Notes'. Below it, there are two tabs: 'MY ARCHIVED NOTES' (active) and 'MY ARCHIVED MENTIONS'. A toolbar includes a 'Select All' checkbox, a 'Date: Newest First' dropdown, a 'Filters' button, and a 'Date Range: 02/22/2024 - 02/22/2025' filter. On the right, an 'Actions' dropdown menu is open, showing options: 'View Notes', 'Reinstate Notes', and 'Delete'. A hand cursor is pointing at the 'Actions' button and the 'Reinstate Notes' option. The list of notes includes: 1. 'Early Drop-off' (Feb 20, 2025 9:41 AM) with a checked checkbox, family 'entz', and category 'Other'. 2. 'Payment Delay' (Feb 19, 2025 1:26 PM) with an unchecked checkbox, family 'Poke', and categories 'Billing' and 'Financial'. 3. 'Playground Incident' (Feb 19, 2025 12:01 PM) with a checked checkbox, family 'Pham', and category 'Medical'. Each note has a copy icon and a right arrow.

Delete a Note

You can delete archived notes. Once you delete a note, you cannot recover it.

1. Click the **Notes** icon  found on the top-right of the system to view all the Notes you have created.
2. Go to the **Actions** menu  > **View Archived Notes**.
3. Select one or more archived Notes using the checkboxes, or use **Select All**.
4. Go to the **Actions** menu  > **Delete**.

967908 > 208 > My Archived Notes

My Archived Notes

MY ARCHIVED NOTES MY ARCHIVED MENTIONS

Select All Date: Newest First Filters Date Range: 02/22/2024 - 02/22/2025

Actions

- View Notes
- Reinstate Notes
- Delete

Feb 20, 2025 9:41 AM

Early Drop-off

Family **Rentz** Categories **Other**

Feb 19, 2025 1:26 PM

Payment Delay

Family **Poke** Categories **Billing** **Financial**

Feb 19, 2025 12:01 PM

Playground Incident

Family **ham** Categories **Medical**

5. Click **Delete** in the *Confirm Delete* window.



For more information on working with Notes within the Staff App, see [Jackrabbit Care Staff Mobile App](#).
