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:

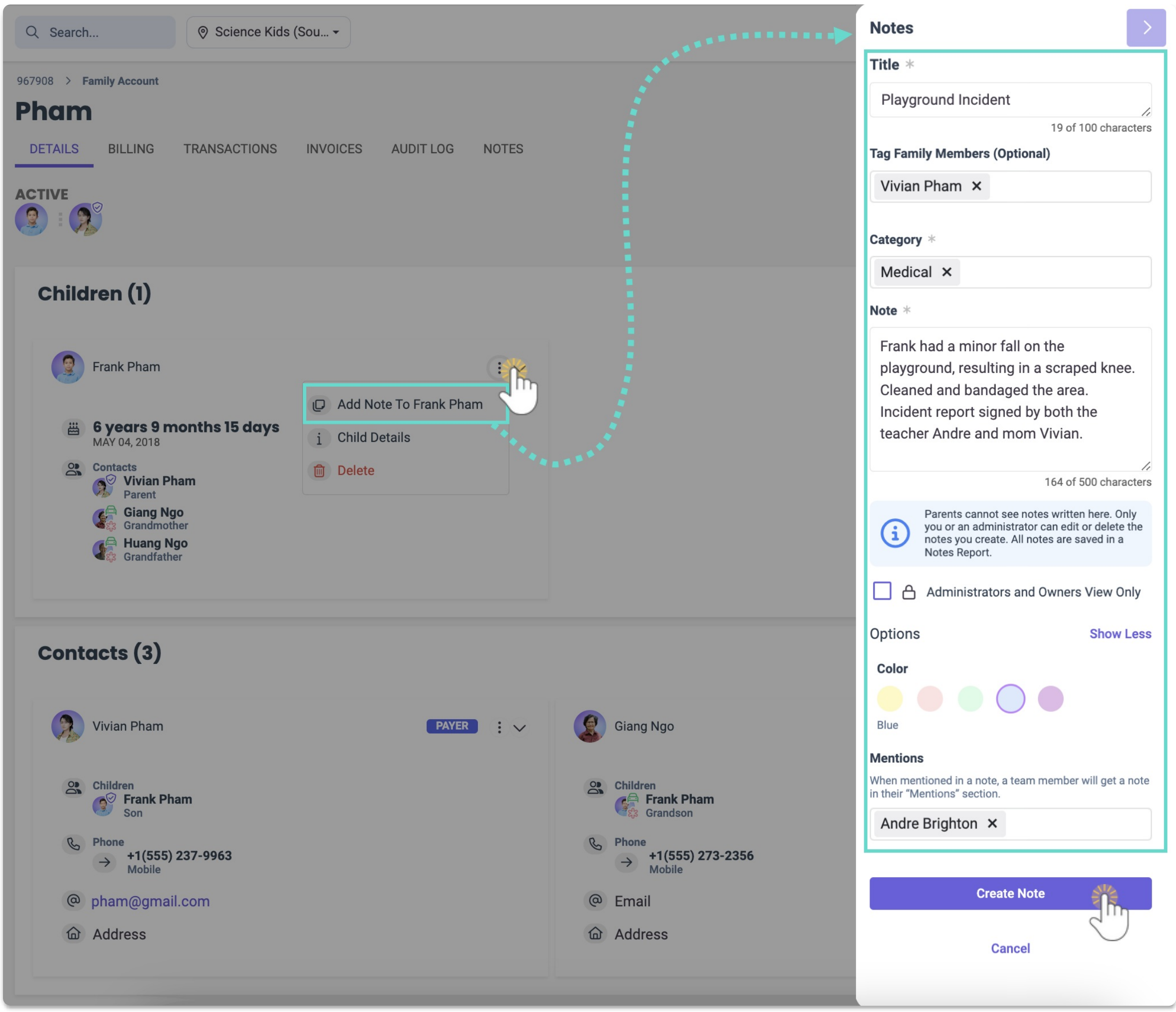
- Inform other team members about a child's needs.
- Track family concerns and points of contact.
- Keep documentation of incidents within your childcare center.

Expand/Collapse All

Add a Note

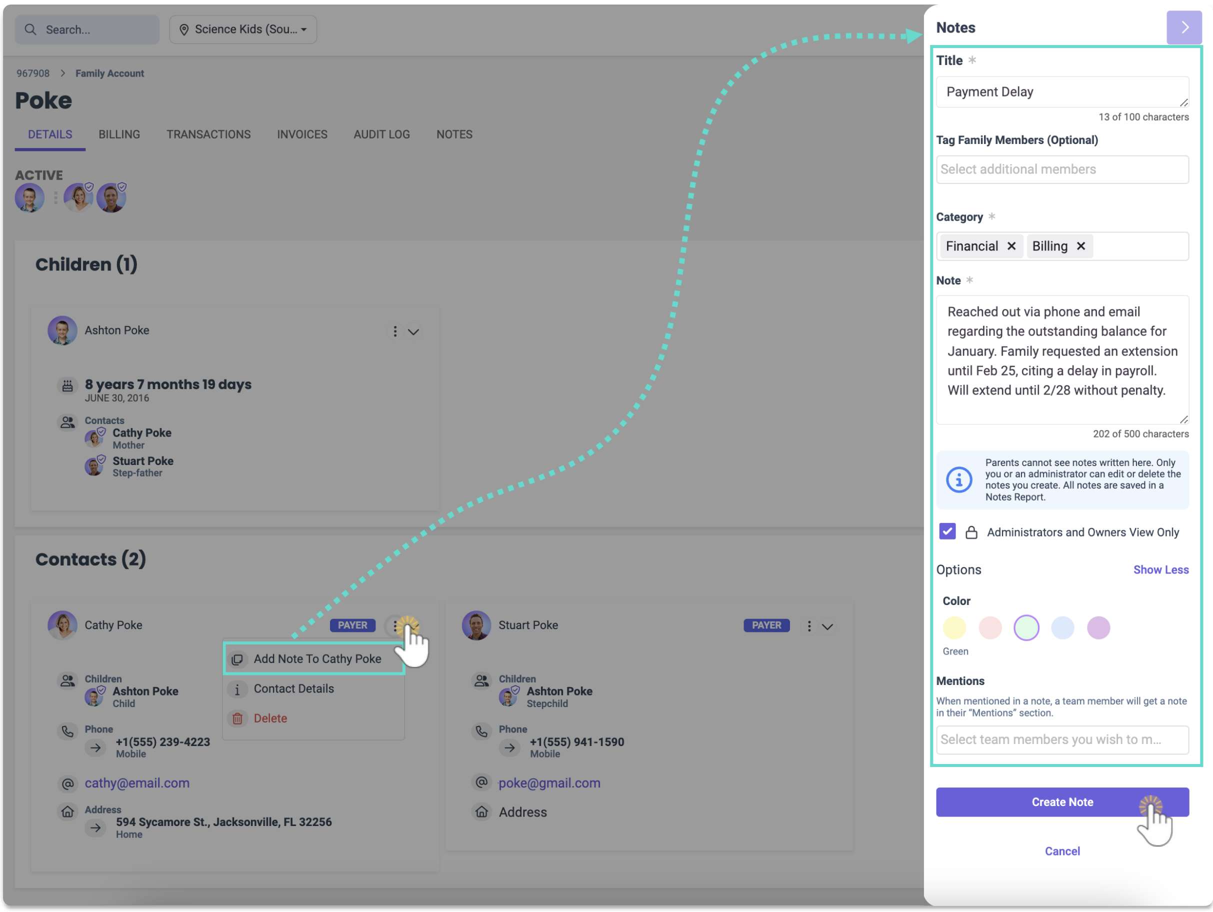
To a Child

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 Actions > **Add Note to Child** 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.



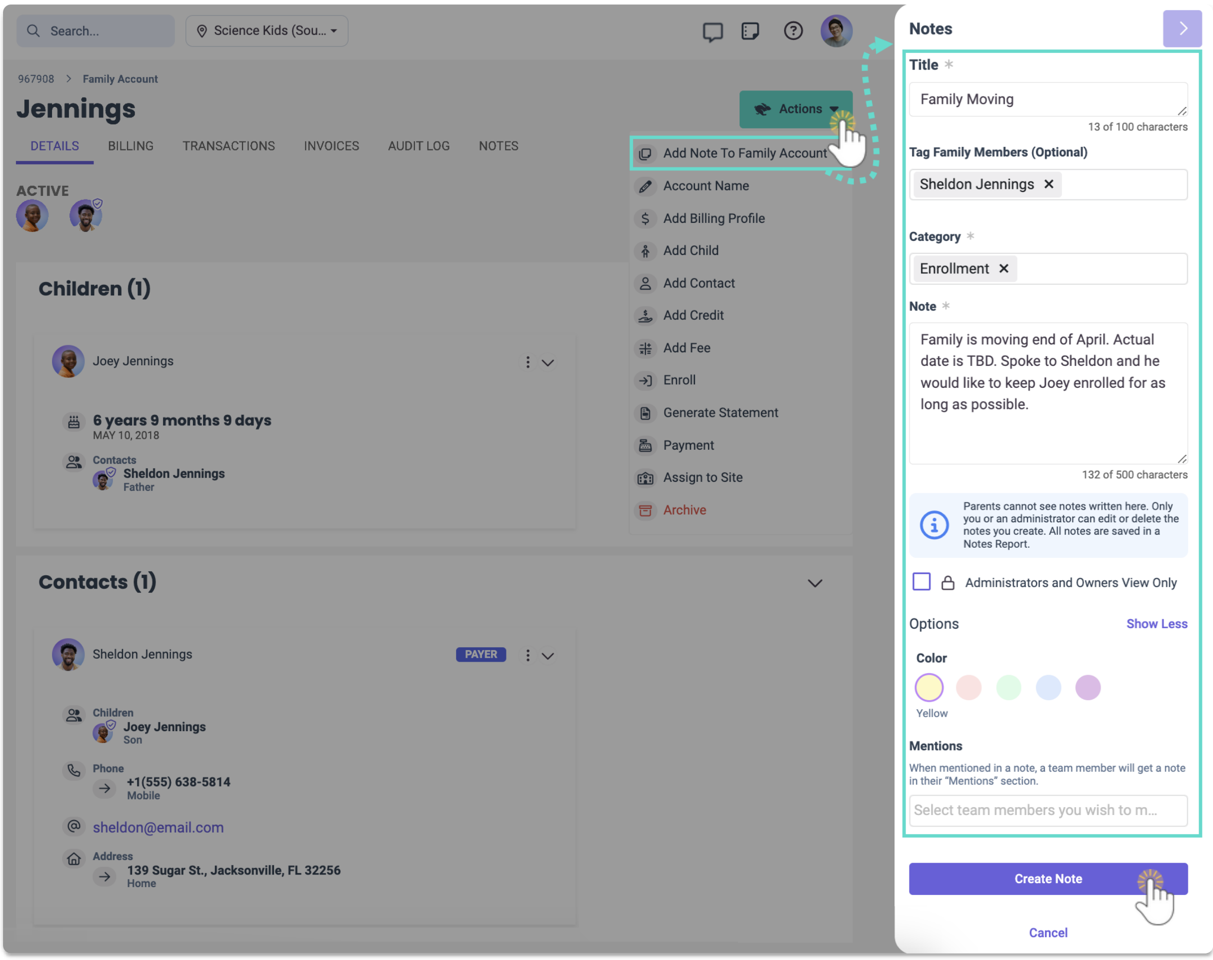
To a Contact

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

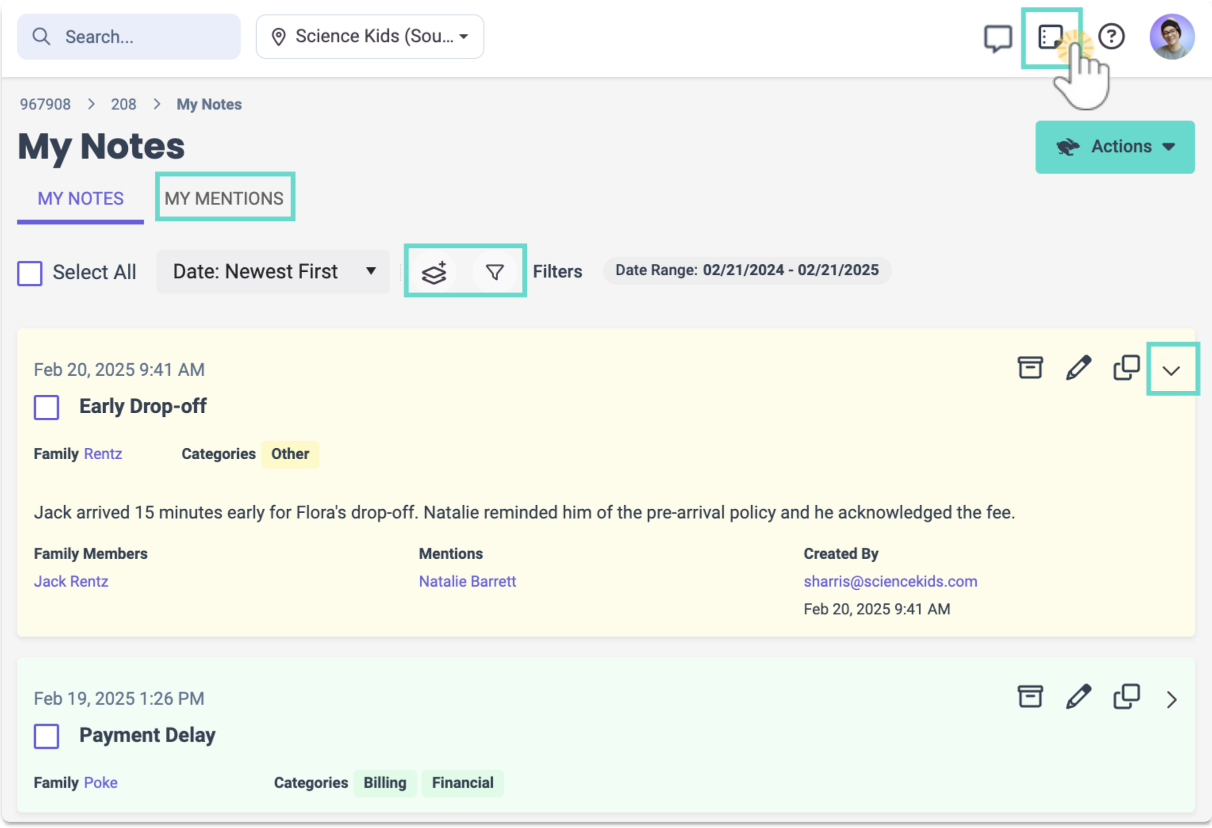
1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**
2. Locate and click the family name.
3. Go to the **Actions** menu Actions > **Add Note To Family Account** if you are an Owner or Administrator.
4. Complete the fields in the *Notes* drawer that opens on 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.

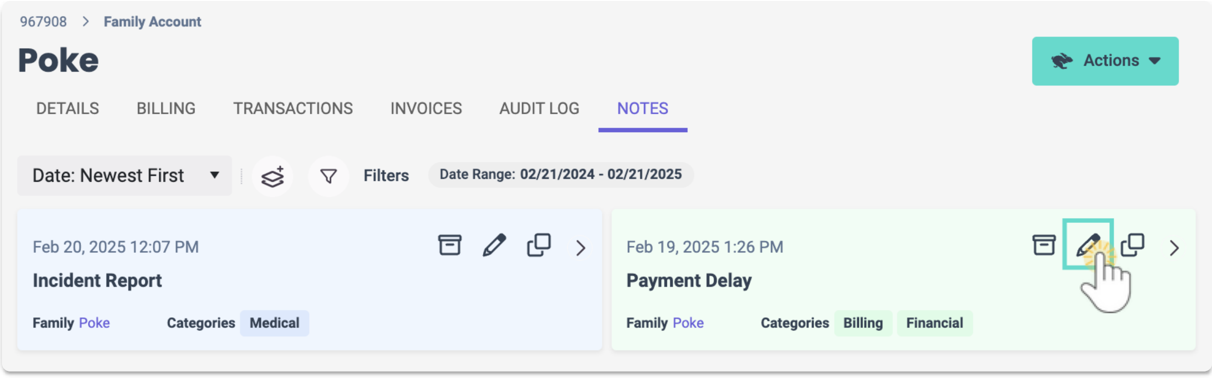


You can also view Notes on a Family Account by clicking the Notes badge on a child's or contact's card, or by selecting the Family Account's **Notes** tab. When viewing notes for a child or contact through the Notes badge, you can filter by *Category* or search for specific text within a Note.

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.



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

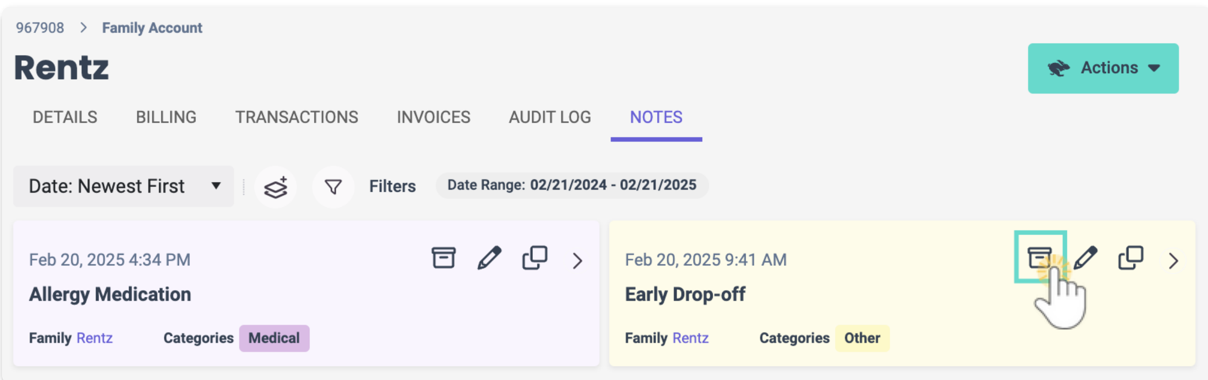
Archived Notes

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.



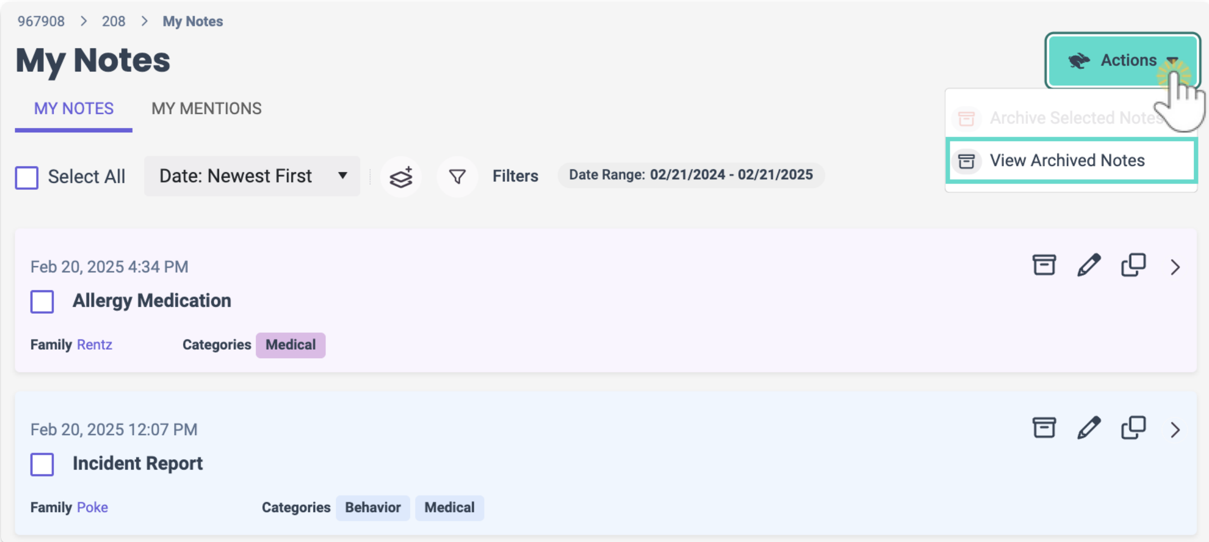
3. Click **Archive** in the *Archive Note?* window to confirm.

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.**

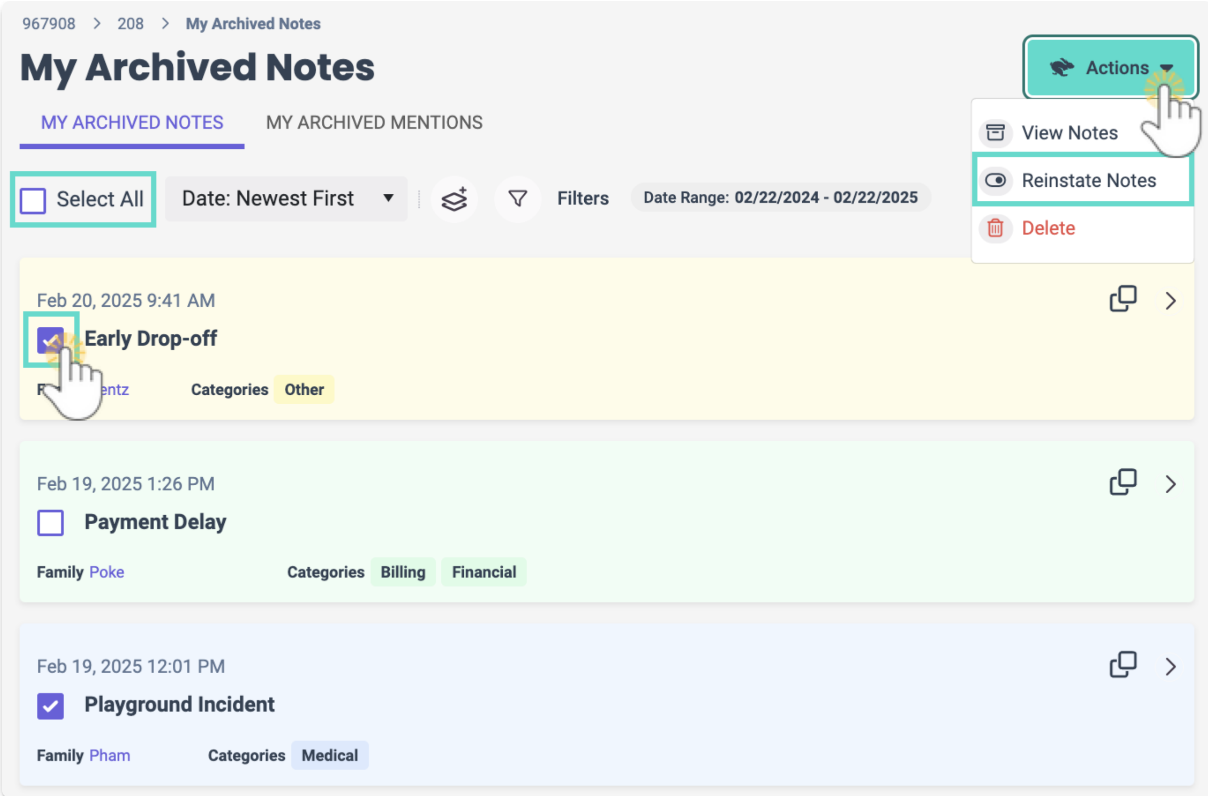
View Archived Notes

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

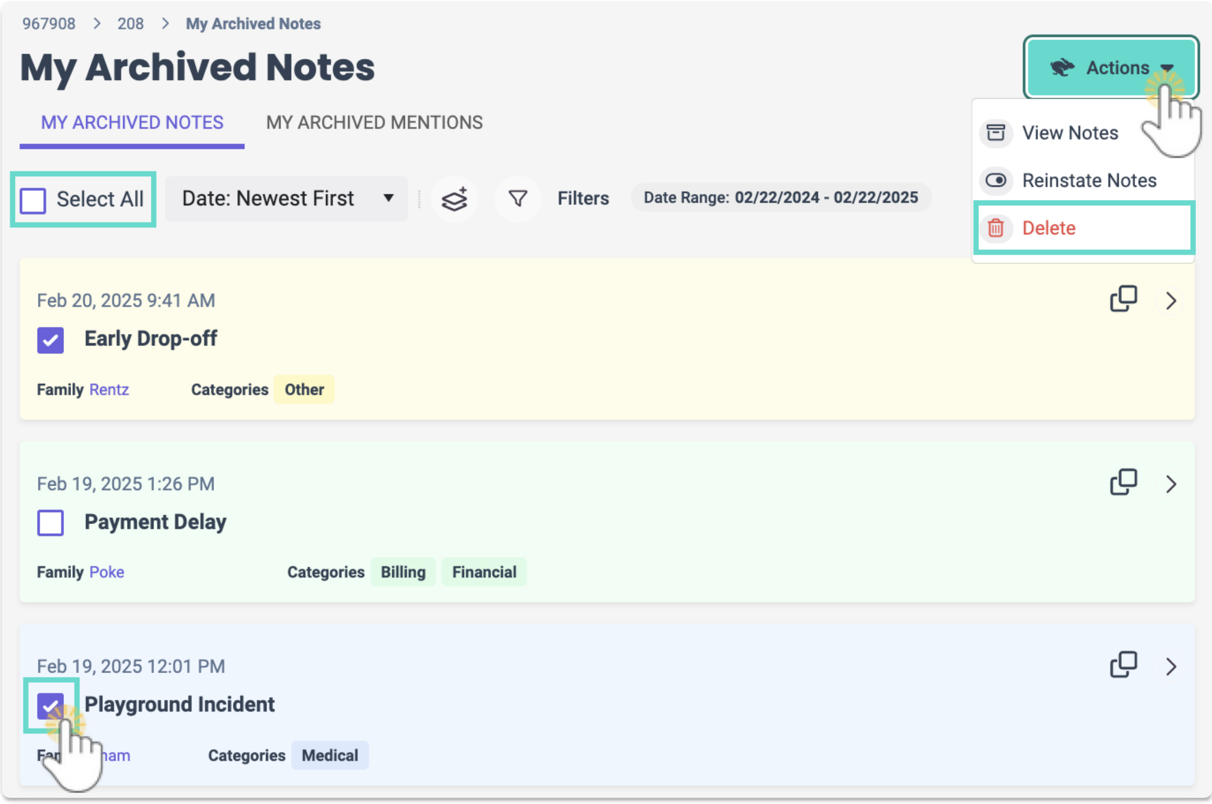
1. Click the **Notes** icon found on the top-right of the system to view **all** the Notes you have created.
2. Go to the **Actions** menu > **View Archived Notes.**
3. Select one or more archived Notes using the checkboxes, or use **Select All**.
4. Go to the **Actions** menu > **Reinstate Notes.**



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 Actions > **View Archived Notes.**
3. Select one or more archived Notes using the checkboxes, or use **Select All**.
4. Go to the **Actions** menu Actions > **Delete.**



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

For more information on working with Notes within the Staff App, seeJackrabbit Care Staff Mobile App.