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Reminders



Help Center Manager

1 month ago · Updated

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Where: Staff can add Reminders for themselves about specific students via the **Add a Reminder to this Student** link on the student’s profile page and can view their Reminder(s) about the student on the **Reports/Notes or History** tab of the student’s profile. Staff can view Reminders for all students via the **My Reminders** page, accessible to staff by clicking the thumbtack icon in the left hand navigation pane. A portion of the staff member’s reminders are also highlighted directly on their Staff Home in the right hand section below Quick Links.

Who: The Reminders feature allows **staff** to easily create and view reminders about their students. The reminders are user-specific—staff can only view their own personal reminders about the student—and includes the ability to add a due date to prompt the action item.

Conditions: Staff members with access to **view student profiles** can add their own personal reminders to the student’s profile.

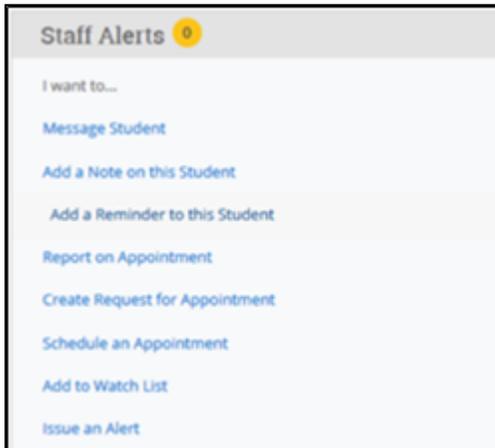
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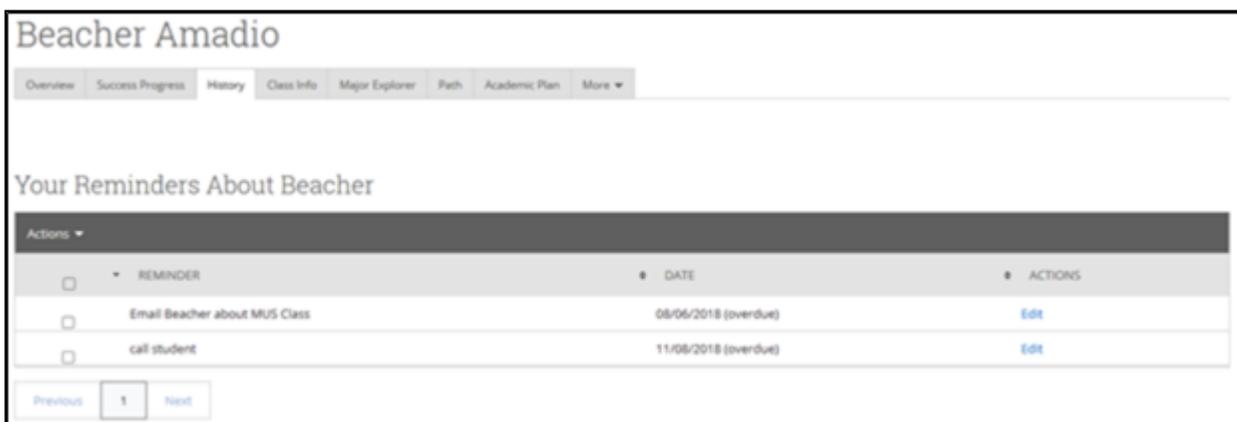
Feature Overview

Reminders are created by staff members in order to prompt a future action regarding a particular student. This can be useful to track next steps for the staff member, to follow up on pertinent information shared during an appointment, or to reconnect with a student at a more appropriate time. For example, you may be working with a student who is having difficulty in a specific course - add a reminder to check-in on the student's progress after the upcoming midterm exams. Alternatively, the student may be exploring summer internship opportunities - add a reminder to touch base in a few weeks and find out where they applied.

Staff can quickly add a reminder via the 'Add a Reminder to this Student' link on the right hand side of the student's profile.



Staff can view their own reminders about the student via the [Reports/Notes or History tab](#) on the student's profile. The reminder details—name and due date—can be adjusted by clicking 'Edit' next to the specific reminder. Staff can remove reminders that they have completed by selecting 'Clear' or 'Delete' from the Actions menu.



While the Reports/Notes or History tab will only show reminders for the specific student, staff can also view all of their reminders by clicking the thumbtack icon in the left hand navigation pane to access the **My Reminders** page.



In the **My Reminders** page, staff will be able to see all of their reminders, the name of the student associated with each reminder, and the due date for each reminder. Through the actions menu, staff are able to clear or delete completed reminder(s), and through the **Edit** link next to each reminder, staff can modify the name or due date for the reminder. Staff can also view each student's profile by selecting the student's name next to the reminder.

My Reminders
Upcoming And Overdue Reminders

REMINDER	STUDENT	DATE	ACTIONS
<input type="checkbox"/> Email Beacher about MUS Class	Beacher Amadio	08/06/2018 (overdue)	edit
<input type="checkbox"/> call student	Beacher Amadio	11/08/2018 (overdue)	edit
<input type="checkbox"/> Follow Up re: Financial Aid	Milburn Taubman	06/16/2017 (overdue)	edit
<input type="checkbox"/> check on financial aid status	Quincy Aberg	07/16/2018 (overdue)	edit

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On the Staff Home page, a portion of the reminders are highlighted in the right hand section below the staff Quick Links. The highlighted reminders are those with past or upcoming due dates. Clicking **view more** at the bottom of this section will take you to the My Reminders page to view the complete list of reminders.

Quick Links

- Take me to...
- [Schedule a General Event](#)
- [Record Class Attendance](#)
- [Manage Assignments](#)
- [School Information](#)
- [Download Center for Reports](#)
- Campaigns...
- [Appointment Campaigns](#)
- [Travel Letters](#)
- [Book Slip Campaign](#)

Reminders

- Follow Up re: Financial Aid
[Milburn Taubman](#)
06/16/2017
- check on financial aid status
[Quincy Aberg](#)
07/16/2018
- Email Beacher about MUS Class
[Beacher Amadio](#)
08/06/2018

[view more](#)

Frequently Asked Questions

I took action on a reminder that I set for myself, how can I remove the reminder from my list?

You can remove the reminder from your list by clearing the selected reminder within the Actions menu.

Can the student see the reminders that I've added to their profile?

No, students cannot view the reminders that you have added to their profile.

Can other users view the reminders that I have added to a student's profile?

No, other users will only see the reminders that they have added to that student's profile.

Related Articles

- [Strategic Care - Student Profile: Reports/Notes or History Tab](#)
- [Strategic Care - Staff Home](#)

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2 comments

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 [Ashleigh Huff](#)

What is the difference in clearing and deleting reminders? I assume deleting they are gone for good and clearing just clears them from "My Reminders"? Are there benefits to simply clearing reminders over deleting? Again, I assume you can find all your cleared reminders for future reference if needed.


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Thanks,
Ashleigh
Spalding University



Community Manager



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Hi Ashleigh,

So sorry for the delayed response here. We somehow missed this question. Figured I would still answer in case you are still wondering about this feature.

The "clear" and "delete" actually pretty much do the same thing. The intent is that you select "clear reminder" when you've completed a reminder task and use "delete reminder" if you created the reminder in error. But there is no tangible difference in outcomes between the two!

Best,

Erin (Community Manager)



Help Center