



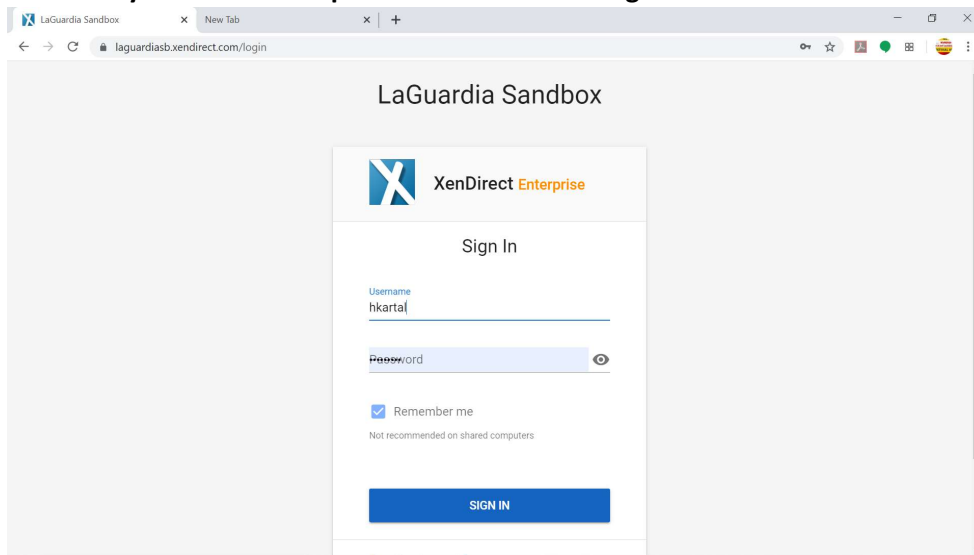
**DARE TO DO MORE**

# How to Enter Case Notes For a student

Instruction to log in and enter students' updates to the Xendirect Registration system:

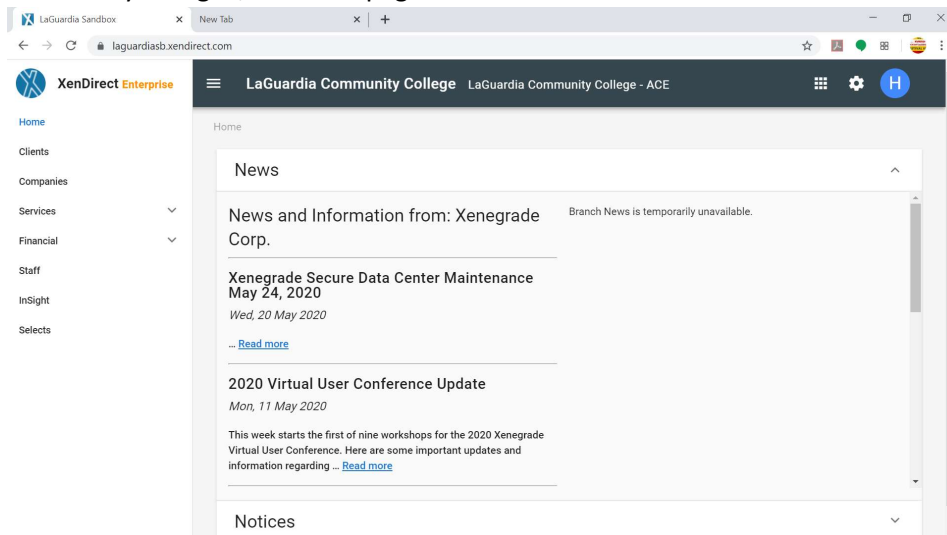
1. Go to the website: <https://laguardia.xendirect.com/login>; your loading page will look like this:

**Enter your user id and password and click on Sign In.**

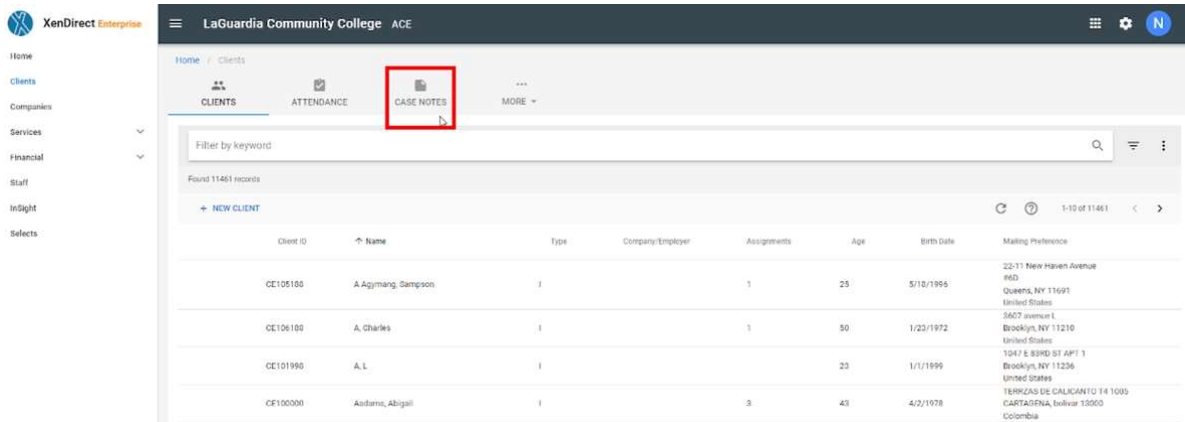


- If credentials have not been provided please contact your program director.

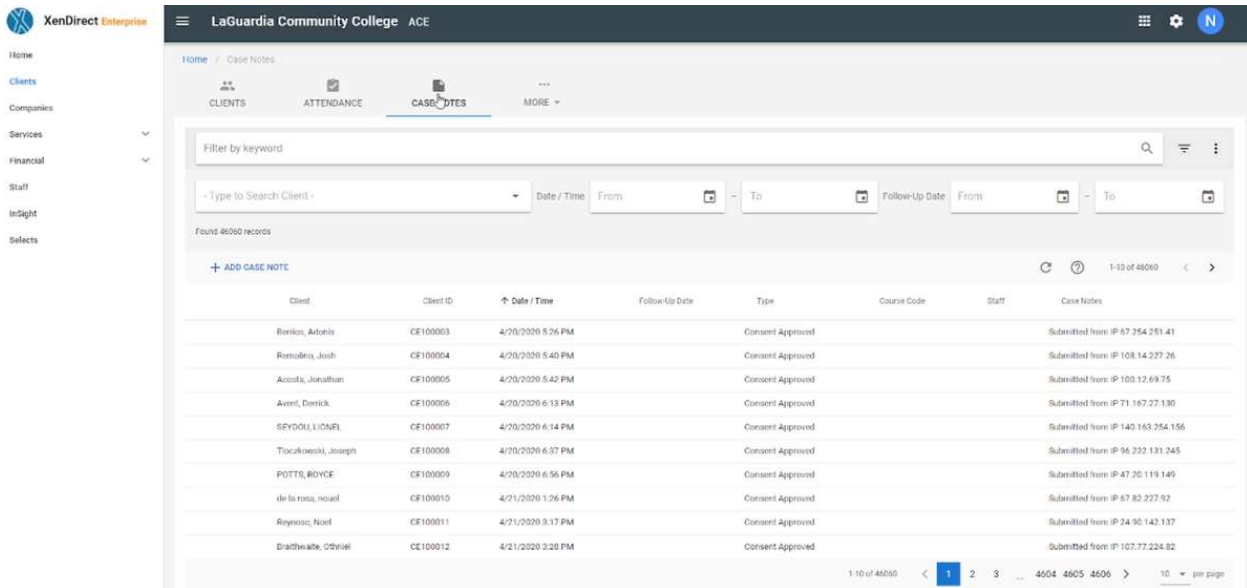
2. Once you log in, the main page will look like this:



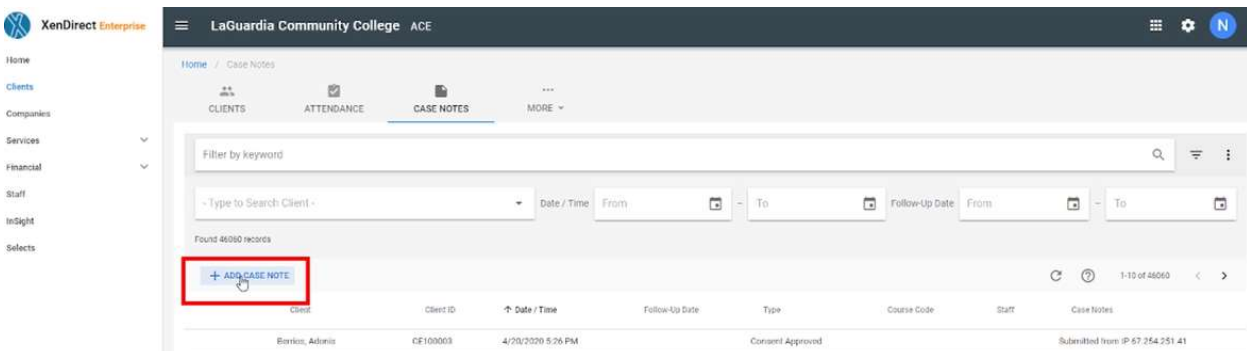
- To access to students records, click on Clients from the left upper corner. Once you click on Client section you will see the option for **Case Notes**.



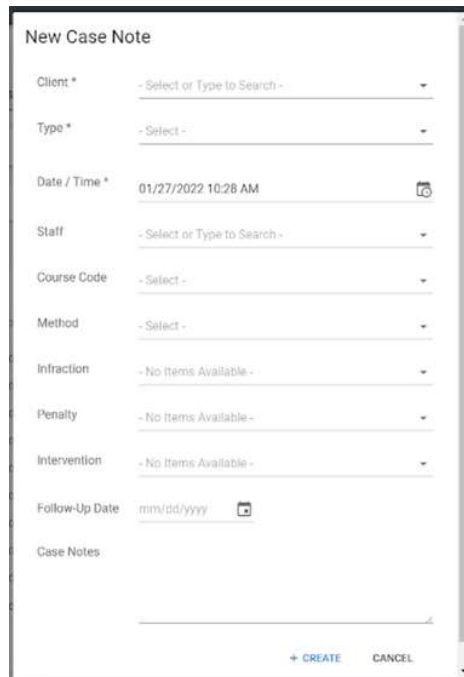
- Once the option for Case Notes is selected you will be able to see all the case notes entered.



- Select + Add Case Note to add a new case note.



6. The new case note window will display. Fill out all required fields that contain \*

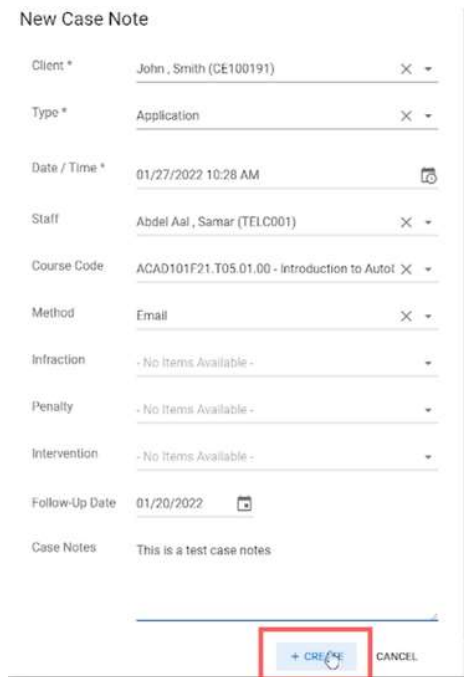


The screenshot shows a 'New Case Note' form with the following fields:

- Client \*: - Select or Type to Search -
- Type \*: - Select -
- Date / Time \*: 01/27/2022 10:28 AM
- Staff: - Select or Type to Search -
- Course Code: - Select -
- Method: - Select -
- Infraction: - No Items Available -
- Penalty: - No Items Available -
- Intervention: - No Items Available -
- Follow-Up Date: mm/dd/yyyy
- Case Notes: (empty text area)

Buttons: + CREATE, CANCEL

7. Verify the information is correct and proceed to press create.



The screenshot shows the 'New Case Note' form with the following fields filled out:

- Client \*: John, Smith (CE100191)
- Type \*: Application
- Date / Time \*: 01/27/2022 10:28 AM
- Staff: Abdel Aal, Samar (TELC001)
- Course Code: ACAD101F21.T05.01.00 - Introduction to Auto
- Method: Email
- Infraction: - No Items Available -
- Penalty: - No Items Available -
- Intervention: - No Items Available -
- Follow-Up Date: 01/20/2022
- Case Notes: This is a test case notes

Buttons: + CREATE (highlighted with a red box), CANCEL

8. Once the course code has been entered, you can perform a search and all the details will be listed on the right side.

The screenshot displays the XenDirect Enterprise interface for LaGuardia Community College ACE. The 'CASE NOTES' tab is active. A search bar is visible at the top, and a table of case notes is shown below. The table has the following columns: Client, Client ID, Date / Time, Follow-Up Date, Type, Course Code, Staff, and Case Notes. The first row is highlighted with a red box.

Client	Client ID	Date / Time	Follow-Up Date	Type	Course Code	Staff	Case Notes
Shivmangal, Ramona	CE133083	7/31/2023 10:26 PM		Message			WebReg Forgot Username/Password email sent.
Shivmangal, Ramona	CE133083	7/31/2023 10:28 PM		Message			WebReg Forgot Username/Password email sent.
Ramharain, Romendra	CE137137	7/31/2023 11:02 PM		Information			A web registration receipt email was automatically sent for the following course(s): ACES303F23.T23.01.00
Kosimova, Maftuna	CE137733	7/31/2023 11:03 PM		Message			WebReg Forgot Username/Password email sent.
Hagins, Estefania	CE133840	7/31/2023 11:08 PM		Information			A web registration receipt email was automatically sent for the following course(s): PHMT099F23.T05.01.00
Carrasco, Jeremy	CE137737	7/31/2023 11:27 PM		Consent Approved			Submitted from IP 172.31.48.234
Barreto, Carmen	CE137623	7/31/2023 11:47 PM		Message			WebReg Forgot Username/Password email sent.
Vega, Luis	CE137738	7/31/2023 11:58 PM		Consent Approved			Submitted from IP 172.31.48.234
Torres Hernandez, Scarlet	CE137739	8/1/2023 12:00 AM		Consent Approved			Submitted from IP 172.31.84.182
Torres Hernandez, Scarlet	CE137739	8/1/2023 12:09 AM		Information			A web registration receipt email was automatically sent for the following course(s): HSEE700U23.G04.08.00

- a. Please note that some case notes are automatically generated by the system to track password resets and registration submissions by the student.

For further info, please visit the Xendirect Knowledge Base page:

<https://xenegrade.kayako.com/article/168-case-notes>