Client Training HQ

# Creating a Case Note

You can add a Case Note to a Foreign National's process, as well as customize who can view and access the information within the Case Note.

To add a Case Note to a Foreign National (FN) process:

1. Navigate to the desired Foreign National record.
2. Click the **FN Action** button in the top left of the screen.
3. Click **Add Case Note**.
4. Add relevant details, such as:
    - **Process** the note relates to (or you can relate the note to **All** processes)
    - **Activity Type** (useful for categorization and reporting)
    - **Subject/Reference** providing a brief description of the note
    - **Details** of the note

    ***Note:*** There is a 32,000 character limit for the Details field. If you go over this limit, your text will automatically be truncated to fit the limit.
5. Optionally, share the Case Note by configuring **View** options:
    - **FN Viewable**: Case Note is visible to the FN via the FN portal.
    - **HR-1 Viewable**: Case Note is visible to the HR-1 assigned to the case, as well as any other HR-1s with permission to access all Company cases.
    - **HR-2 Viewable**: Case Note is visible to any HR-2s assigned to the case.
6. Optionally, assign the note to other users. Case Notes assigned to a user will appear on their **Case Notes** module as a note that it is **Not Viewed** yet.
7. Click **Update Info** to save, and/or click **Update & Return** to return to the FN record.

## More Training Available!

Check out additional training resources available on our site, Connections.

*The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.*