CHAPTER TWELVE

Notes and Reminders

Introduction

Notes are on of the simplest ways to provide useful information to an independent Explorer and to extend long term memory. As with Calendar items an Explorer may not create new Notes, but they will view the Notes a Guide creates. A Guide can create and manage an Explorer's Notes using the techniques described in *The Guide's Toolbox*.

In this chapter we'll review examples of how to use Notes and what kinds of Notes a Guide and Explorer may create. We'll also review how Notes should be configured on iPhone and, using Google Keep, on Android.

We'll also briefly discuss Reminders. Notes support long term memory, Reminders support short term memory. Notes are often created by Guides, but Reminders are almost always created by Explorers. Reminders are a more advanced feature than Notes.

Notes: The basics

Whether an Explorer is following the Apple Way with Notes.app or the Google Way with Keep.app their Notes will look very similar. They will look like a stack of long "sticky notes" or short documents.

[INSERT SCREEN SHOT]

An Explorer will typically start with a handful of Notes created by a Guide, but that number will grow over time. Some Explorers will add their own Notes or update existing Notes, but others will stay with viewing Notes.

Sometimes Notes can include diagrams or images, but text notes are the most important. All of the examples described in this chapter are text Notes.

Some information in Notes may be confidential, these Notes require a secure smartphone and Cloud as described in *Setting up an Explorer's Smartphone*.

Confidential Notes should only be used with an encrypted smartphone that has long letter-number smartphone unlock codes, fingerprint identification, a responsible Explorer, short timeout auto-lock, and a strong Cloud password. Some low end Android phones may not be encrypted, don't put confidential information into Google Keep on those devices.

Many Explorers will prefer to browse Notes rather than search for them. Typically Notes will be ordered by the date they were last changed with the most recently changed Notes at the top. The first line of a Note will typically show as the Note title, so a Guide should make that line meaningful when browsed or when they appear as a search result.

In addition to showing up as a list an individual Note can be retrieved by searching. Not all Explorers will use search; those that do are probably creating and editing their own Notes. If an Explorer is using search a Guide may add likely search terms in the note, perhaps as a list of words at the button of a Note.

Searching can be done by entering text into a search field or by using Siri on the iPhone or ____ on Android. For example, asking Siri to "Show me a Note about special olympics" will find all notes containing the words "special" and "olympics".

Notes can be organized into named collections called "Folders" in Apple Notes.app or organized by "Labels" in Google Keep.app. This adds complexity however and should only be considered if an Explorer has more than 50 notes and really dislikes using Search.

There are many ways to use Notes to extend an Explorer's memory. Our next chapter uses examples taken from real world experience.

A library of Notes

A Guide should start out by creating a handful of Notes that are of greatest interest to an Explorer. These might include Notes such as a list of Yu-Gi-Oh card characters, information that may be more important to the Explorer than to the Guide. The key, of course, is to create a starting set that the Explorer appreciates and that they will choose to reference.

Once an Explorer is used to browsing a small number of interesting Notes, and perhaps using Siri to search them, it's time to build out the full "library". Table [___] can provide some ideas; the more independent an Explorer is the bigger their Notes collection may grow. Another way to grow a useful Notes collection is to turn reference information sent in emails into a Note.

Many of these example Notes hold non-sensitive or public information, but some require that both the Explorer's smartphone and Cloud information are truly

secure as described above. In the table below *items that require a secure device are italicized*.

Note Title	What's in the Note
Banking information	Bank account information, how to make deposits or withdraw money or find balance, ATM PIN code if Explorer has difficulty remembering it, numbers to call for a lost or stolen credit card.
Bicycle	Bike maintenance advice, serial numbers, what to do if lost or stolen.
Budget	Notes about when bills are due, how to pay, wise limited on spending.
Church, Temple, etc	Names of religious leadership, times of services, people who are part of religious life, social events coming up.
Clothing sizes	Sizes for clothes, boots, shoes.
Combination locks, PINs and passcodes	We all have too many of these. A single Note is a good way to hold them all, but of course this requires a secure smartphone and a secure Cloud.
Dates	Important dates, such as birthdays and anniversaries and tax preparation. (Duplicates what's on the Calendar, but often useful to have separately.)
Emergency Information	Who to contact in case of an emergency. This is not the Emergency information that's part of Apple Health.
Family photos	How to view family photo shares.
Financial worker	For many Explorers the Financial Worker (benefits administration) is separate from the Social Worker and there are different procedures to follow. Some Explorers will want Notes combined, others will like separate notes.

Fun stuff	Notes to support local recreation, leisure and fun activities; a helpful resource for independent time scheduling. An Explorer or Guide may use this Note when working on the Calendar. For example: movie theater, pizza and sub delivery, church, etc. Gym information might go here instead of the Gym Note.
Gym information	Open hours, class schedule
Home	Apartment/group home details including contact numbers (also in Contacts), lock out procedure, how to request maintenance, how to work with the rental office.
Library information	Schedule, library card number, WiFi procedure.
Medical history, dental and health insurance numbers	To share with caregivers, particularly in an emergency. Includes major medical problems, current medication, providers, people to contact, insurance numbers.
Neighbors	Names and addresses of neighbors, particularly for Explorers who have difficulty remembering names or matching names to people. This may duplicate what's in Contacts.app (address book) but is helpful to have separately.
Passwords and credentials	Username, passwords, web site address (URL), and "secret questions" with companion "answers". See also *Email and creating a digital identity* and *Securing the Cloud*. **Be sure to store a printed copy of this information, it's easy to accidentally wipe out Note contents.**
Relatives and special people	Names and birthdays of extended family and special family friends. May be combined with Neighbors.

Residential program manager/staff contacts	Some of these will also be in Contacts, but this is important information for many Explorers. It deserves a separate Note.
Smartphone tips	Basic smartphone tips. If appropriate for Explorer a reminder of how to find the smartphone manual (example: iBooks).
Social worker	Name of social worker and how to work with them, particularly around bus and transit services. The Transit Note might refer here, and the Social worker information might also be in Contacts.
Social Security and Disability Information	Contacts and details, spending limits and reporting requirements. Date of next follow-up (this would also go in the Calendar).
Sports teams and social group	For each sports teams and social group useful information such as link to team calendar, names and numbers of coaches and players.
Staff and aides	Names of support staff and contact information. This will also be in Contacts.app
Transit	Guides to transit including bus pass information if applicable. Reminder of how to use a transit app to get bus information.
Travel and packing	Packing and travel advice for a short trip.
Web addresses	Generally web addresses will be part of other Notes or they'll show up on the Credentials page, but in some cases it's useful to have a short separate list.

WiFi locations and WiFi passwords	Explorers need WiFi to backup their smartphones or download new apps, but they may not have WiFi at home. In some cases it may be useful to list locations and passwords, such as Coffee shops or the Apple Store. Library WiFi information may go here or in the Library Note.
Work and work training program.	Supervisor and care manager and any work requirements or procedures including transportation arrangements.

This is a long list, but the the more independent an Explorer is the more their Notes collection will grow. A Guide should start with 4-5 Notes then work with an Explorer to build out the Notes collection. Many Notes may begin as information sent in an Email; very few Explorers will search email for reference information.

Some Note content overlaps with Calendar and Contacts. A moderate amount of duplication is needed, but too much becomes a maintenance burden. The appropriate location will vary by Explorer, but the Calendar is particularly important.

Most Explorers will learn to update and manage their Notes; that is a great life skill to encourage. Managing Notes includes deleting obsolete Notes, a Guide will want to make Notes review, including deleting obsolete Notes, a part of their scheduled weekly Explorer support time.

Notes: The Apple Way

Apple's Notes are relatively simple to use on iPhone and iCloud and they are well described in Apple's iPhone manual (https://help.apple.com/iphone/). Apple's Notes have many options, including sketches, photos, and checklists, but these can be ignored for Notes we describe.

The Guide should confirm that an Explorer's Notes.app settings are correct. Go to Settings:Notes and confirm the following standard settings apply:
- New Notes Start With Body
- Default Account is iCloud
- "On My iPhone" Account is turned off

At this time you can also enable a Password option for Explorer Notes that need to be very secure, like a Note that contains password or account information. You need to have Touch ID enabled on an Explorer's phone for this to be practical, because you will want to create a "strong" (long and unpredictable) password and keep that password safe. You can read more on password storage in *Email and*

creating a digital identity and *Securing the Cloud*, see below for some important caveats.

Next the Guide should confirm they can view the Explorer's Notes in the Chrome browser by using Chrome's People menu to switch to their account and then authenticate with iCloud.com.

With this setup Notes exist in both Apple's iCloud and an Explorer's iPhone. Changes made in iCloud by a Guide with a web browser and an Explorer's iCloud credentials will quickly appear on an Explorer's iPhone. This is the way I have created most Notes for my Explorers, though as described below a Guide can also create Explorer Notes on their iPhone then add the Explorer as a

Any changes an Explorer makes on their iPhone will also change the Note in iCloud. This isn't always a good thing; an Explorer may intentionally or accidentally delete a Note, or remove key content. I'll come back to this in a moment.

The fastest and easiest way to create and maintain an Explorer's Notes is to use a web browser and the Explorer's credentials (username and password) and edit them as the Explorer. There's another approach to consider that's a bit slower at first but makes maintenance easier. A Note created in a Guide's iCloud account can be shared with an Explorer. The Apple iPhone manual describes how this works. Once an Explorer accepts the invitation to edit a shared Note it can be updated using either the Guide or the Explorer's credentials. If the Guide created the Note the Explorer can't delete it, they can only remove their own access[1] and that can be restored (though the Explorer can delete the Note's contents).

It's tedious to share many notes one at a time[2], it would be helpful if Apple were to give us a way to share multiple Notes all at once. When I'm creating a set of Notes to share with an Explorer I first create a folder named for the Explorer. I can do this on my own iPhone or in my iCloud account (or on my Mac for that matter). Then, as described in the iPhone User Guide, I send an invitation to my Explorer's iCloud account — either by sending one email at a time or copying the share link into a single email. This is faster to do in a web browser where it's faster to copy and paste email addresses and links.

The sharing isn't done yet though, there's one more step. After a Guide sends share invitations an Explorer has to accept them to turn sharing on. A Guide can do this using an Explorer's iPhone or opening iCloud Mail with the Explorer's credentials. After this is done a Note can be edited by both Guide and Explorer.

There is an important limitation to sharing. You can't password protect (secure Note) a shared Note. *If you are using a Note to store an Explorer's credentials[3] (account name, username, password, web address) it should be a Secure Note[4] and it can't be shared*. You will want to create a credentials Note on the Explorer's iCloud account; be sure to print a copy[5] and save it in a secure place. Since credentials change over time you will need to do this more than once.

Another important limitation of Apple Notes is backup. On the one hand Notes have much better automated backup than most people have on their computers,

and a deleted Note can be restored from the "Recently Deleted" folder for up to a month. On the other hand there's no way to recover old versions of a Note - if an Explorer or Guide accidentally (or deliberately) wipes out Note content it can't be recovered!

There isn't anything Guides can do about this problem; we need Apple to give us a fix. There are workarounds I use, but they are outside the scope of this book.[6] The simplest workaround I know is to use the iOS Share feature to email a copy of each critical Note to a Guide's email address. It can then be retrieved from email or printed or otherwise stored.

There's a lot more to iPhone Notes. Notes can contain photos and sketches for example, this may be helpful for some Explorers. The key is to start with the basics and then work together to find what works best. The biggest issue for our use of Notes is the version problem, but only some Explorers run into this issue. If you use an Explorer's Notes to store credentials you won't be able to share it and you need to give in a secure password. Otherwise Notes are pretty simple to create and use and they are a great memory aide.

Notes: The Google Way

The standard Android installation doesn't include memory extending Notes app, but Google's similar Keep.app is free to download form the Google Play store.

Keep.app has a Notes feature and a Reminders feature. I discuss the Reminders feature later in this chapter, it's not useful for most Explorers. The Notes feature is what Android Explorers will use.

An Explorer will review Keep.app Notes on their Android phone. They will open the app and browse through notes or tap the magnifying glass icon to enter search text. Some Explorers will enter their own Notes, but for most Explorers a Guide will create and edit Notes using the web version of Keep (keep.google.com) and the Explorer's Google credentials.

I addition to a Guide editing an Explorer's Notes using the web app and the Explorer's credentials, Keep Notes can also be shared between Guide and Explorer Google accounts. This is a useful feature to experiment with once an Explorer is comfortable with Notes. It does make things more complex however; I recommend disabling sharing in Settings to begin with. Otherwise there's not much to change in Keep.app's Settings.

Google Keep Notes can have a Title, but it's optional. If the Title is omitted the list of notes will show the first few lines of the Note. If a Guide is creating a Note like the ones in A library of Notes they should create a title that's meaningful to the Explorer. Either the title (best) or the body of the Note should include the words an Explorer would use in searching for the Note.

An Explorer can delete a Note from Keep.app, though the deletion feature is bit obscure (a small set of dots in lower right hand corner of a Note brings up a menu with a delete option). A deleted Note can be recovered from the "Trash" within 7 days, after that it's gone. This is a problem if an Explorer is fond of deleting Notes! At this time there isn't a way to backup the Notes from Google Keep. Google Keep Notes also have the same problem as Apple's Notes.app Notes; if an Explorer edits a Note then the original information cannot be recovered. As I mentioned when talking about Apple's Notes, the backup and restore problem is something Apple and Google need to address not only for Notes but for all of their modern Cloud based software.

Notes: The Google Way on iPhone

Google Keep is available from Apple's App Store and it works very much like Google Keep on Android. If you've configured an Explorer's iPhone as recommended in *The Guide's Toolbox* then Keep.app will work with an Explorer's Google account. I don't recommend installing Keep.app on an iPhone however, Apple's Notes.app is a better product for most Explorers.

Notes: Simplenote - an alternative to Google Keep (and even Apple Notes)

The focus of this book is using a smartphone to promote independence. For the most part Android and iPhone ship with the productivity apps we need for calendaring, communications and so on. Some of these apps are more Explorer-friendly than others, but with practice many Explorers will use them well. Since the "bundled" applications tend to have many users and documentation, and since they are supported by wealthy companies, I prefer them whenever possible.

Notes, an important long term memory aide for Explorers, are an exception. Apple's Notes.app is well done; new features add complexity but they are relatively easy to ignore. Google's Keep is a bit of a mess though, and there isn't a good bundled Explorer-friendly Notes app for Android.

So for this one important function Android Explorers need to look elsewhere. My recommendation is an ad-free and fee-free app called Simplenote from Automattic.[7] I must warn that being both ad-free and fee-free is *not* a good thing. Nobody knows why Automattic, a well respected and profitable company, continues to support Simplenote.app; including developing an excellent Android version. If they charged at least $20 a year'd I'd be happier! Despite my concerns Automattic's ongoing work and industry reputation[8] allows me to make this recommendation[9].

Despite having no obvious revenue source Automattic supports Simplenote.app versions for the web (which a Guide will use), iPhone and iPad, Windows and Mac, Android and Kindle Fire and even Linux[10]. I have personally used Simplenoteapp for years on iPhone and Mac and have tested it on my Android phone. It is not flawless, but it is an excellent product. I prefer Apple Notes for most iPhone Explorers[11], but if deletion and unwanted editing is a problem then Simplenote.app has some helpful features.

The first step in using Simplenote.app is for a Guide to create the Explorer's account at simplenote.com. Account creation requires only an email address and a password. A Guide should use the Explorer email address discussed in Identity and email addresses: iCloud and gCloud and create a unique password as discussed in Managing credentials: user names and passwords. As I'll discuss below a Guide may also want to create an account for themselves.

After creating the Explorer account a Guide should review the online settings, but the defaults are fine. The next step is to install Simplenote.app on an Explorer and Guide's smartphone. I'll describe the installation for Explorers first, then I'll come review why a Guide may also want to install Simplenote.

Simplenote.app is easy to search for on the Google play[12] and Apple App stores; just confirm the product is sold by Automattic[13]. From either store you install the product on the Explorer's smartphone like any other store app.

Once Simplenote.app is installed launch it to enter the Explorer user name and password you created on the web site. A Guide will then see a greeting message and an empty list. The Explorer's phone is now ready for Note creation.

A Guide will usually create Notes from the web version of Simplenote.app using their personal computer and a keyboard. They can do this before or after Simplenote is setup on the Explorer's phone.
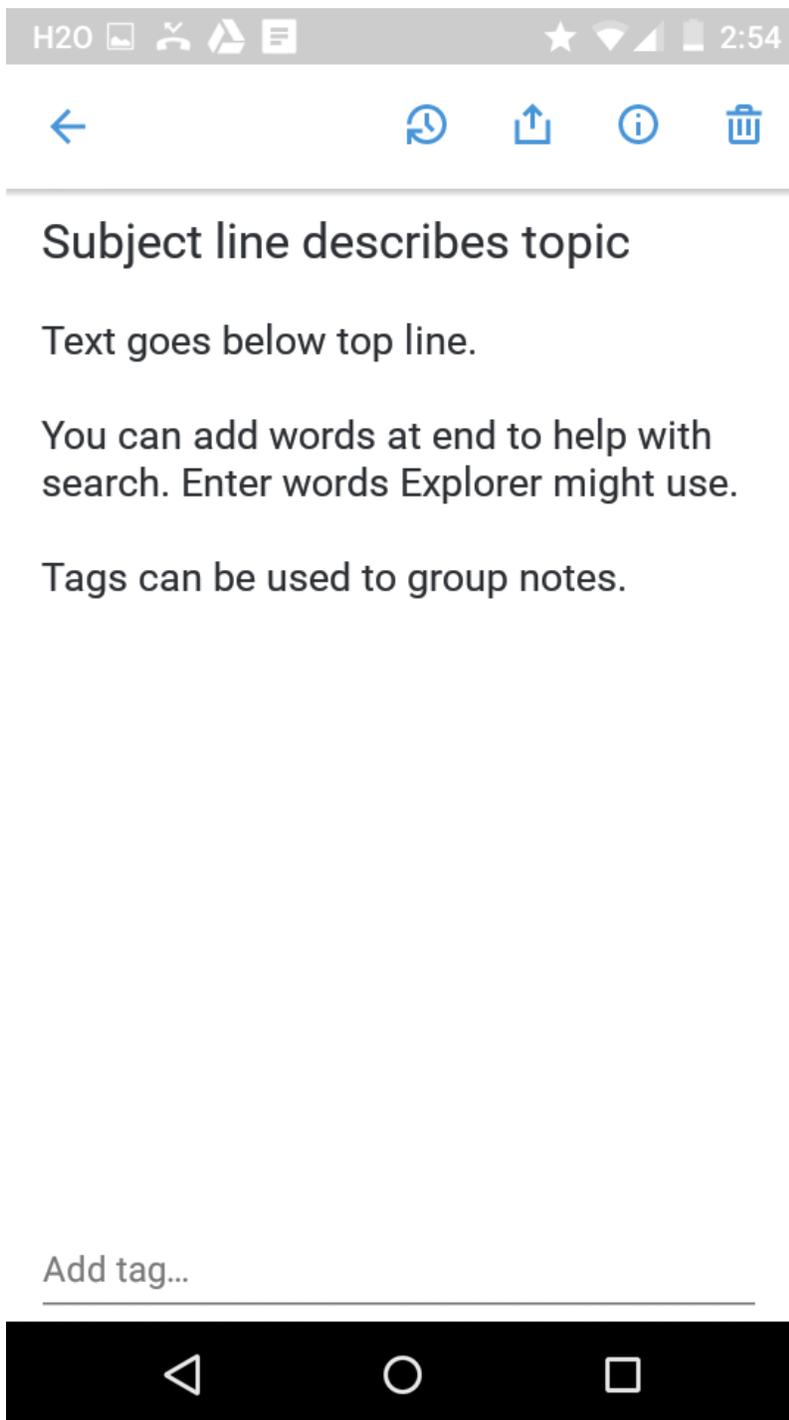
There is no documentation for Simplenote beyond a "help" web page, simplenote.com/help, so I'll fill in some of the gaps here. Fortunately Simplenote is well named. It really is a simple application. The screenshots below are from the Android version of Simplenote; the iOS and Web versions are very similar.

The image below shows a typical Note, in this case one I wrote. Besides the text of the Note there are icons at top and bottom and a "tag" list at bottom. Tags can be used to organize Notes, for most Explorers I recommend ignoring tags. They aren't essential and they add complexity.

As described in the screenshot below of a sample Note, Notes have a Subject line and text. Everything is searched; it's helpful to enter terms an Explorer might use to find a note at the end of the note (many Explorers will browse notes rather than use search). Search works well in Simplenote.app for iPhone, Android and Web.
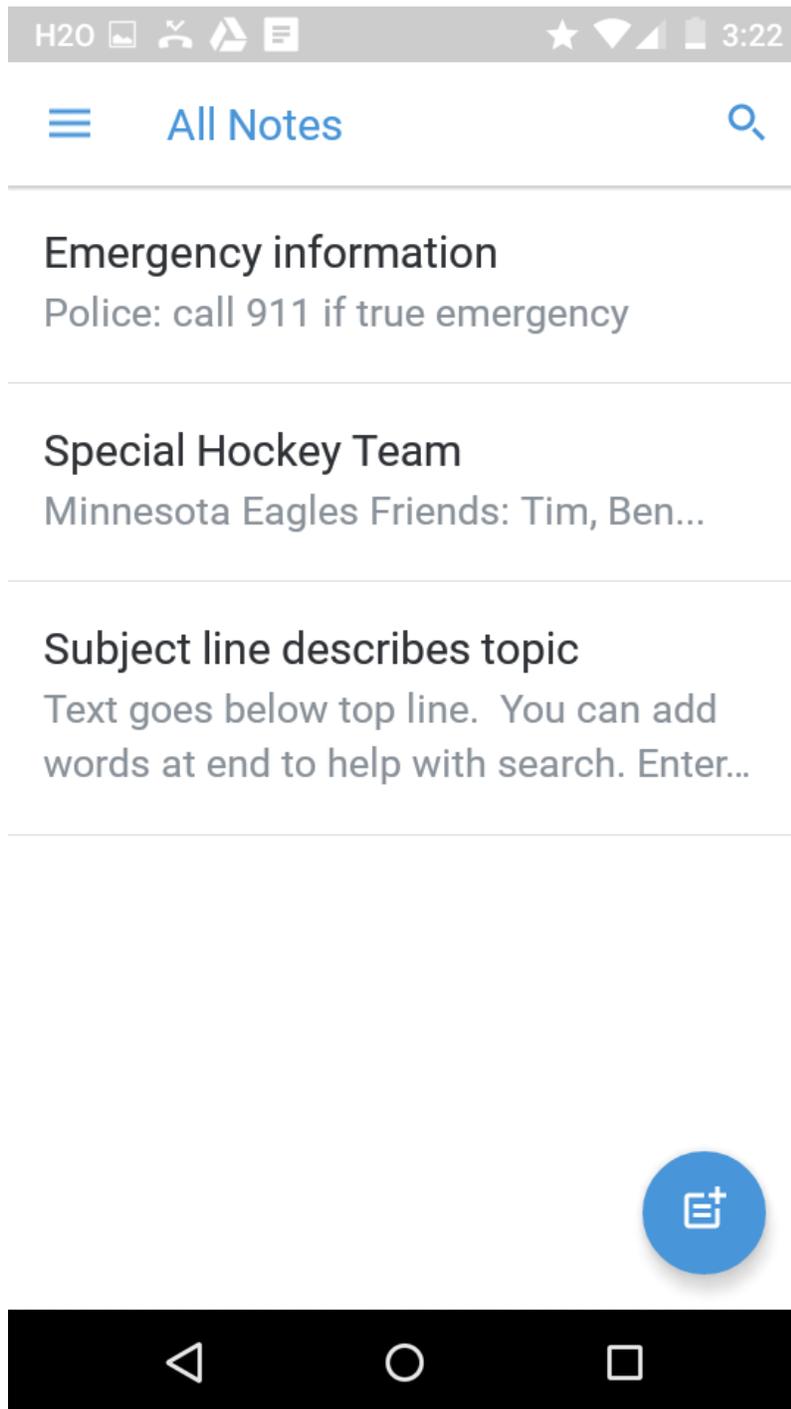
The arrow icon in the top row returns to a list of all notes (see below). The clock face icon shows prior versions of a note — which is a great feature for Explorers who may make unwanted edits (see below). The "share" and "information" icon

can be ignored. The trash icon puts the note into the "trash" (but it can be recovered, see below).
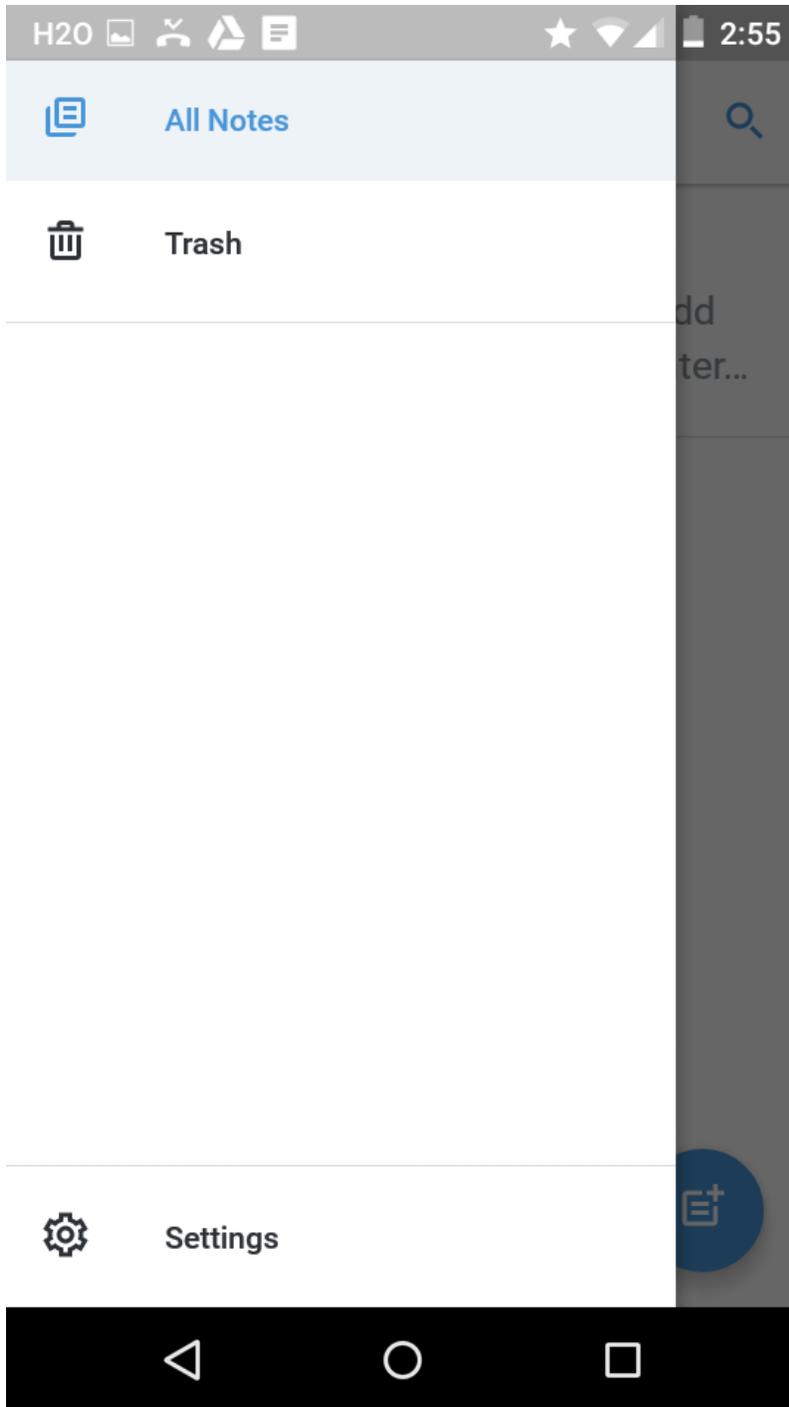

Tapping on the back arrow in the above screenshot shows the list of Notes as below. These can be searched by tapping on the magnifying glass icon or a new Note can be created by tapping on the blue circle icon in the bottom right of the
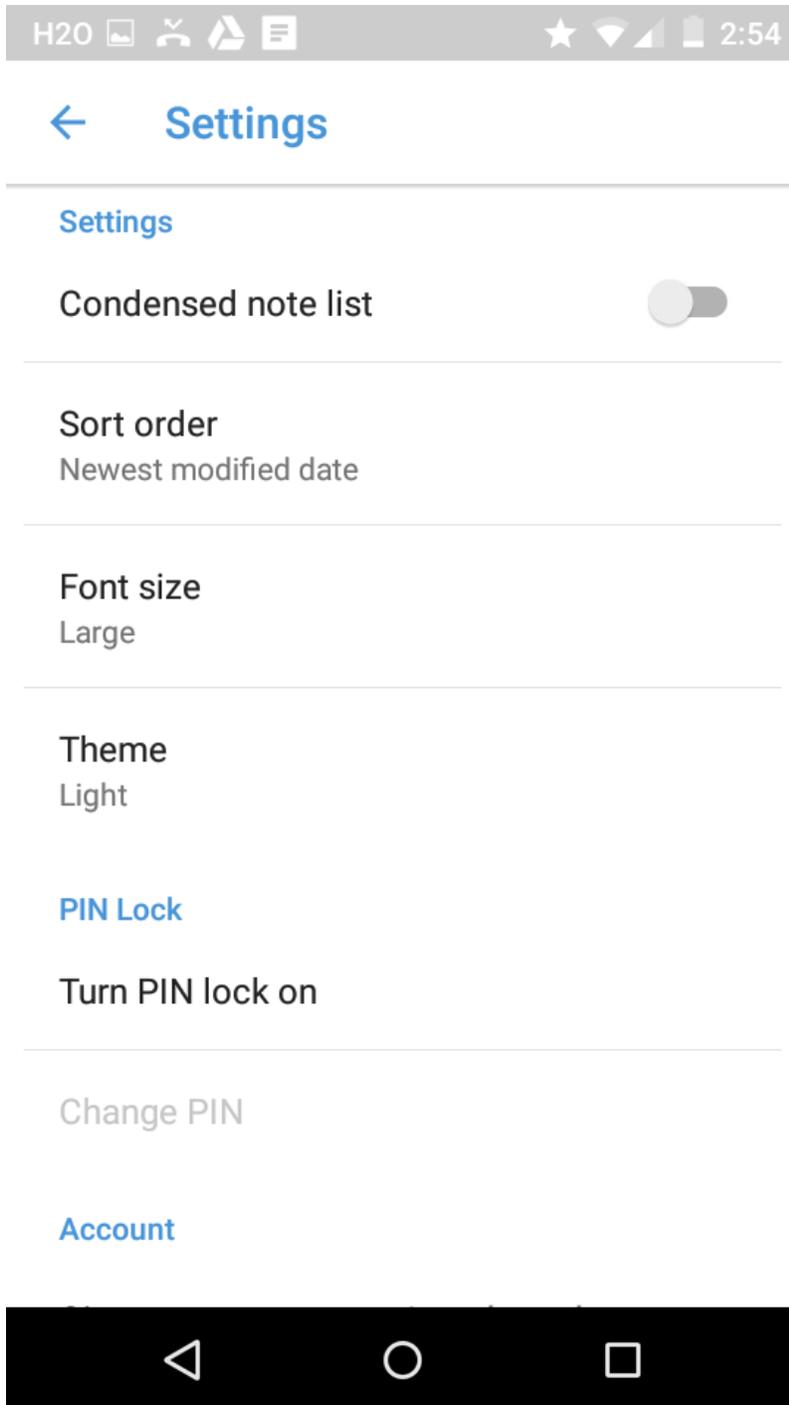
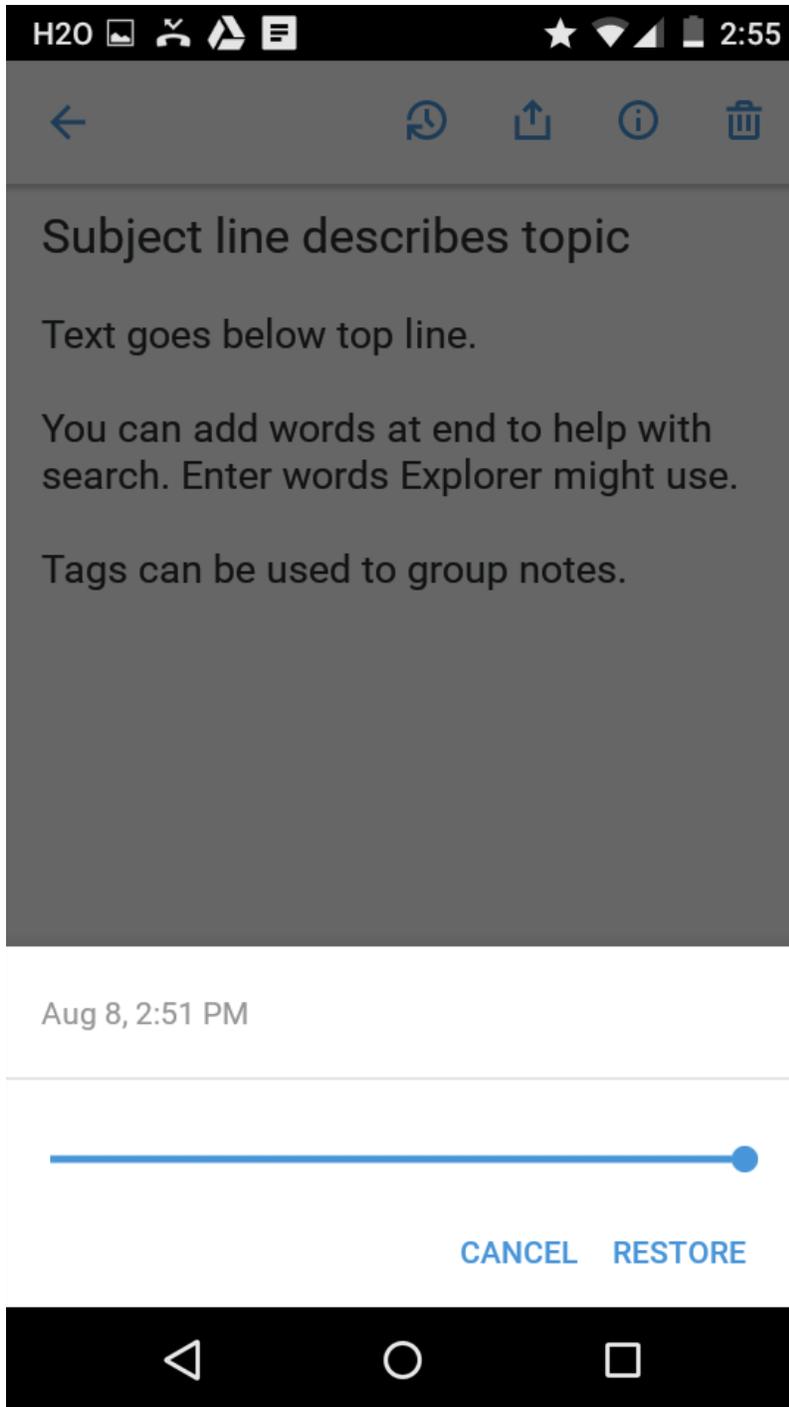image. There's a Google "hamburger" menu to the left of the top row.

Tapping on the Google "Hamburger" menu of 3 horizontal lines shows a largely empty screen (because we have no Tags) with Trash and Settings. You can recover deleted notes from Trash. They stay there until Trash is emptied — a great feature for Explorers.

    The settings are pretty straightforward, but I recommend changing the font size to Large. Some Explorers may want to change the Sort order from "newest modified" to "alphabetically. That way the order of the Notes doesn't change if an Explorer navigates a list of 30 or so notes by browsing the subject lines.

Simplenote has one last great feature I wish Apple Notes had. You can see previous versions of a Note by tapping on the clock icon noted above. As shown below a slider will show prior versions. So if an Explorer edits away an important note, it can be readily retrieved.

That's pretty much all there is to Simplenote.app. It is a big improvement on Google Keep, and a worthy competitor to Apple Notes.

For best results it helps if a Guide uses Simplenote.app themselves. I personally recommend it!

For creating an Explorers Notes most Guides will use a web browser as described in The Guide's toolbox. With Chrome it's easy to switch to the Explorer's identity and Chrome will store Simplenote credentials. If a Guide isn't using Simplenote.app for themselves they can configure Simplenote.app up on a Guide's phone with the Explorer's credentials. The Guide will then see the Explorer's Notes and can edit them, but they won't be able to use their own version of Simplenote. I recommend using the web browser technique.

Reminders: the string on your finger

Most of the smartphone apps have a pretty clear use. Calendars are about events and planning time. Notes are mostly about things you want to remember and find in the future. Contacts are about people and businesses.

Reminder apps for iPhone and Android aren't as well defined. Some people use them like To Do lists or task managers, some use them for recurring tasks like taking medications, others use them for short term memory boosts — "string on the finger" type reminders.

For most Explorers I recommend *not* using Reminders or To Do list apps. They add complexity, they overlap with use of Calendar event alerts and Notes, they aren't always suited to Guide review and their uses are ill-defined.

Instead of using the Reminders app for things like taking medications, I prefer to create Calendar events with reminders instead. They don't have the 'mark as complete' feature that recurring Reminders have, but they have most of the reminder value and Calendars are easy for Guides to review and revise.

If an Explorer does have a need a short term memory boost, then Reminders can be useful, especially when they are used with Google's "Now" or Apple's "Siri".

With Reminders a Guide isn't doing remote creation or management — short term memory aides are under an Explorer's control. The Guides role is to help an Explorer practice with the feature, as described below for Google and Android.

Reminders: the Apple Way

On an iPhone Reminders are handled by Reminders.app, a dedicated app provided by Apple that's part of every iPhone. I'd previously recommended hiding this app from an Explorer's Home Screen, so the first step is to put in a good Home Screen location. Since the Reminder function needs notifications it should be placed so the the Badge App count of post-due Reminders can be seen.

The next step is to review Notification Settings for Reminders.app and review the app-specific settings. In Notifications find the entry for Reminders.app and turn them all on. The "Alert Style" should be "Alerts"; these stay visible until a user dismisses them.

The Notifications settings supports sounds or vibrations or both. There are many ways to customize both sound and vibration, you can even purchase additional sounds. I personally like the knocking sound of "Bamboo" and vibration off, but this is a personal choice for an Explorer to make.

Next check Settings for Reminders.app. There can be more than one list of Reminders,[14] but for we want only one and it should be the default.

There are two ways for an Explorer to create Reminders. One is to open Reminders.app and type a reminder into an open line. It's better to use Siri though, this is one area where Siri is a big improvement on finger tapping. The key is to say "Remind me to _____ in _____ 15 minutes. Or "Remind me to _____ at ___ pm tomorrow".

The Reminder will produce an Alert Style notification. It pops up on an iPhone screen. It can then be marked as done.

The Reminders.app can be used as a lightweight task application or it can be used for recurring reminders such as daily medications. Those users are outside of the scope of this book though. For most users, Explorers and Guides alike, Reminders are most useful as a short term memory aid.

Reminders: the Google Way

Google offers two solutions for 'string on the finger' reminders. One comes with Keep.app, which we discussed above for keeping Notes on Android phones. The other is part of "Google Search and Now", the voice recognition service built into most Android phones.

The two solutions don't share information automatically. On an iPhone one can create a Reminder with Siri, or type it into Reminders.app, either way it ends up in the same place. Android phones don't yet work this way[15]. This is an odd arrangement and sooner or later Google is sure to fix it.

For our purposes I recommend ignoring the Google Keep reminders. If an Explorer wants to try something, use the Google Now function.

To use Google Now first check Google Settings for Search and Now:Voice. Turn on "Ok Google" if you haven't already, including "from any screen". Ask your Explorer to train the "Ok Google Voice Model".

The Google Now voice recognition is very good. To create a Reminder first say "Ok Google" to trigger Google Now, or tap the search bar microphone at the top of the Home screen. To create a Reminder and Explorer says something like "Remind me to ___ in ____ minutes". Google understands a lot of time and date information, but for our purposes "___ minutes" or "___hours" or "___ o'clock" are most common.

Google Now Reminders need to have a time and date. An Explorer can't just say "Remind me to brush my teeth", but they can say "Remind me to brush my teeth at

8am every morning".

If an Explorer wants to see all their reminders they say "Ok Google, show me my reminders". Yes, Google's Reminder function is largely driven by voice instead of tapping! From the list of my reminders an Explorer can go to a full view where individual reminders can be tapped on and edited or deleted. This part is tappable!

Google Now reminders pop-up on the screen when they are due and they are easy to dismiss.

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[1] This is less protection that it seems; the Explore can still remove some or all of the content leaving an empty shell of a Note.

[2] One day Apple may give us a way to share several notes all at once, but we're not there yet.

[3] I discuss managing Explorer credentials in the security chapters. If an Explorer knows their credentials they can share them. As Explorer's become more independent there's a balance between independence and security.

[4] Since the iPhone is encrypted and password secured you might wonder why this extra protection is needed. I recommend it because Explorer's have to know their iPhone access code and it has to be relatively easy to enter — Touch ID periodically requires access code entry. Explorer's may share their iPhone pass code. So Explorer iPhone pass codes are not secure enough for a Note that holds user credentials.

[5] You will often see advice not to print passwords. This belongs in the Bad Advice Hall of Fame. Security experts universally recommend a printed copy in a secure location that you will remember. Just be sure to shred or burn the paper before discarding.

[6] If you have a Mac there's a way to setup a user account for an Explorer. In that account a Guide can select all Notes and and drag them to create a local store. It's a crude and not very practical form of backup.

[7] Microsoft's OneNote is an impressive product, but it's quite complex. Simplenote is a better fit for most Explorers.

[8] Automattic's main product is WordPress, the dominant web publishing platform.

[9] The best scenario would be that they develop extra features and charge for those while keeping the base product free.

[10] It is hard to describe how odd this is. "Desktop" Linux is used only by computer hobbyists and some software developers.

[11] Lots of people use it, it's a good product, it's well documented, and you can get help from the Apple store,

[12] play.google.com/store/apps/details?id=com.automattic.simplenote is the Google Play URL, but search works.

[13] Crooks often create applications with names that resemble popular products,

but they rarely fake the name of the developer.

[14] Reminders can be shared, so multiple people can be notified to to do the same thing. This sounds useful, but in practice it's not worth the complexity.

[15] There is a way to have Google Now reminders copied into Google Keep but it's too obscure to be useful for most Explorers.