Add & View Notes to Students

Overview

This quick reference guide will cover how to add a note to a student's record.

NOTE: *Notes* are viewable by students, staff, advisors, and faculty with access to the student's record. Therefore, notes should be objective, simple, and as neutral as possible.
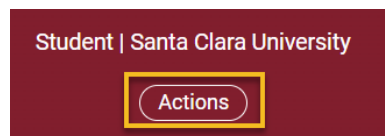
NOTE: Before starting your tasks in Workday Student, follow the set up procedures outlined in the *Getting Started* guide found under *Workday Training and Support* here.

Process: Add Note

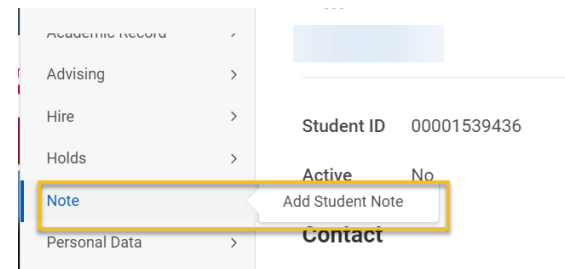1. Navigate to the **Student Profile** using the instructions here.

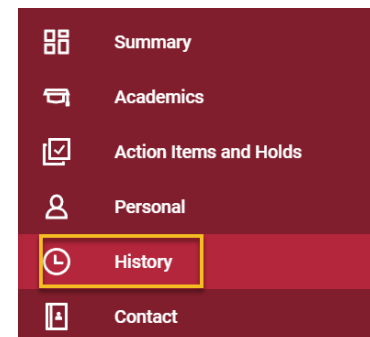Add notes to a student's record using one of the two methods below:

a. Choose the **Actions** button under the student's name.

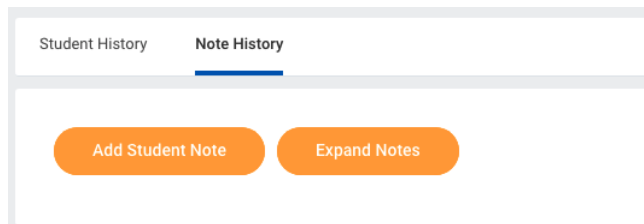In the **Actions** menu, navigate to **Note** and then **Add Student Note**.

b. Select **History** from the menu below the student's photo.

Select **Note History** and **Add Student Note**.

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2. Enter the following information in the specified fields:

- **Student:** This will default to the student's name.

- **Note Topic:** Topics are sorted by functional area. To find topics related to advising, click in this field.

- **Conversation Initiated by:** Choose Institution, Parent/Guardian, Student, or Other.

- **Note Date and Time:** This will default to the current date and time.

- **Note:** Enter the content of your note here.

- **Share with Student:** Yes or No. Choosing *yes* will allow the student to view the contents of the note.

NOTE: Even if the note is selected to not share with the student, the note is part of their record and students can request to see all information.
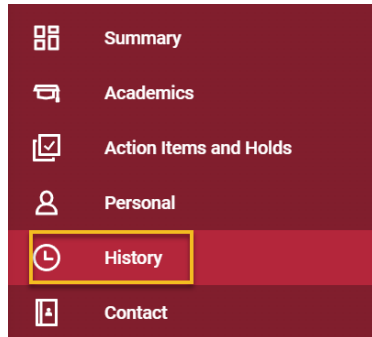

3. When you are finished, click **OK** and **Done**

Process: View Notes

1. To view notes made on a student's record, navigate to the **Student Profile** using the instructions here.

2. Select **History** from the menu below the student's photo.

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3. Select Note History and **Expand Notes.**

   NOTE: You will only be able to see notes that you have security access to view.