



Add & View Notes to Students

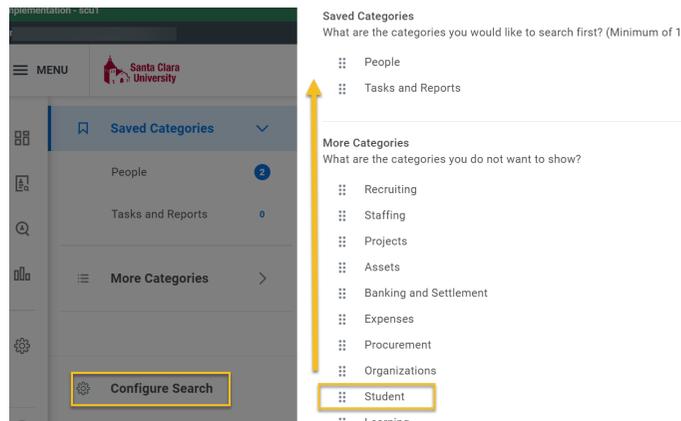
Overview

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.

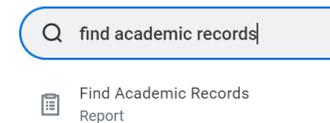
Process: Add Note

1. First, you will search for a student record. The most convenient way to do this is to configure your search in Workday. On the *Search Page*, click on **Configure Search** drag **Student** up to the top.

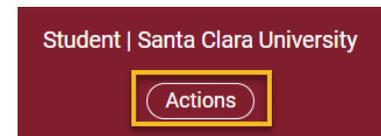


NOTE: If the student has a preferred name that differs from the legal name, the preferred name will be prioritized in searches even if you search by the legal name.

You can also enter **Find Academic Records** into the **Search Bar** and press **Enter**. This report will allow you to locate the student and click directly to their profile.



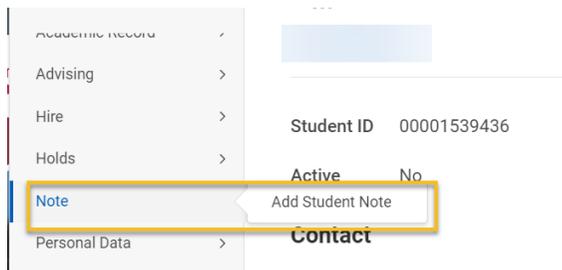
2. In the search results, click the appropriate name to access the student **Profile**.
3. Click the **Actions** button under the student's name.





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



- 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 the their record and student's can request to see all information

Add Student Note

A screenshot of the 'Add Student Note' form. The form has several fields, each with a red asterisk indicating it is required. The fields are: Student (text input), Note Topic(s) (text input), Conversation Initiated by (text input), Note Date (date and time input, showing 02/06/2023 and 08:55 AM), Note (rich text editor), and Share with Student (dropdown menu, showing 'select one'). The 'OK' button is orange and the 'Cancel' button is white with a grey border.

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

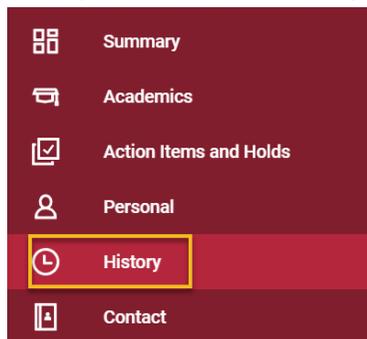


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Process: Viewing Notes for a Student

1. To view notes made on a student's record, search for the student to locate their **Student Profile** (see step 1 in the above instructions).

2. In the profile, click the **History** tab.



3. This will allow you to see the **Note History**.

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

The screenshot shows the 'Note History' tab selected in a navigation bar. Below the navigation bar are two orange buttons: 'Add Student Note' and 'Expand Notes'. Below the buttons, it says '1 item'. To the right of this text are several icons for table actions. Below is a table with the following data:

Creation Date & Time	Date & Time	Note Category	Note Topic(s)	Conversation Initiated by	Note Crea
02/06/2023 09:18 AM	02/06/2023 08:55 AM	Academic Advising	Academic Advising (Academic Advising)	Other	Garrison I