



# 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.

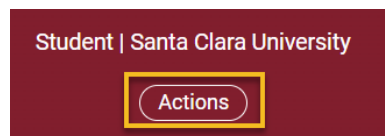
**NOTE:** Before starting your tasks in Workday Student, follow the set up procedures outlined in the *Getting Started* guide found under *Workday Training and Support* [here](#).

### Process: Add Note

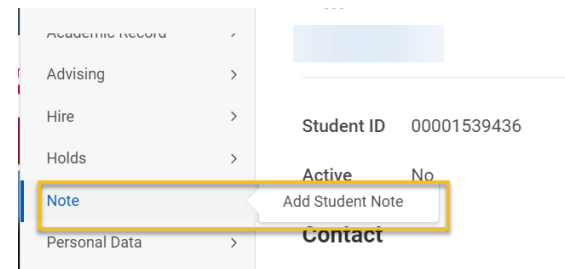
1. Navigate to the **Student Profile** using the instructions [here](#).

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

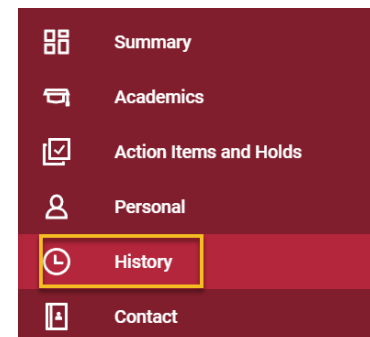
- a. Choose the **Actions** button under the student's name.



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



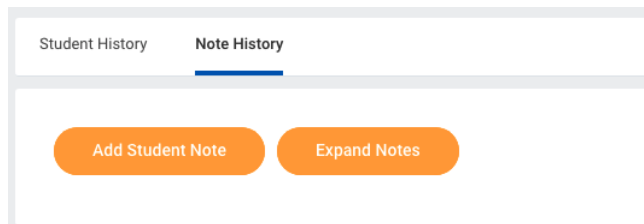
- b. Select **History** from the menu below the student's photo.



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.

## Add Student Note

The form contains the following fields and controls:

- Student:** A text input field with a red asterisk and a dropdown menu icon.
- Note Topic(s):** A text input field with a red asterisk and a dropdown menu icon.
- Conversation Initiated by:** A text input field with a red asterisk and a dropdown menu icon.
- Note Date:** A date and time input field with a red asterisk, showing '02/06/2023' and '08:55 AM'.
- Note:** A rich text editor with a red asterisk, a toolbar (Format, B, I, U, A), and a text area.
- Share with Student:** A dropdown menu with a red asterisk and the text 'select one'.
- Buttons:** An orange 'OK' button and a white 'Cancel' button.

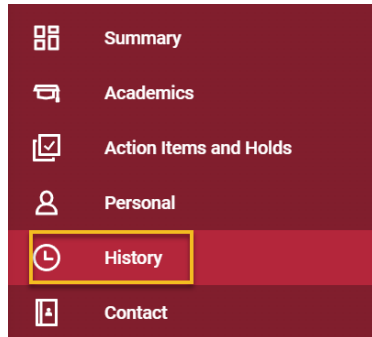
3. When you are finished, click **OK** and **Done**

## 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.



# Add & View Notes to Students



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

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

Note History   Student History   Additional Data

Add Student Note   Expand Notes

1 item

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 L