



# Add & View Notes to Students

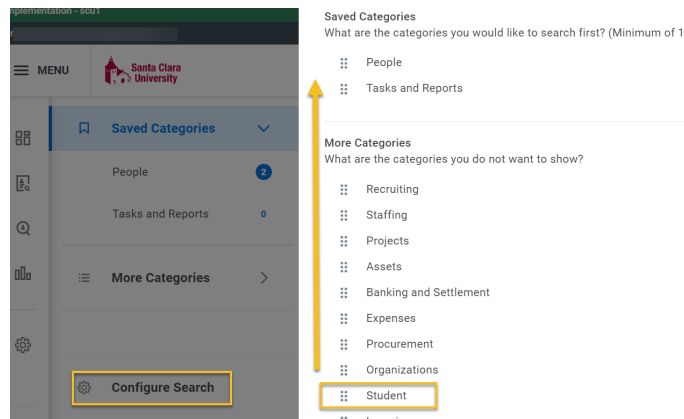
## Overview

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.

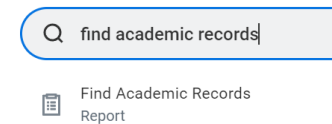
### Process: Add Note

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.

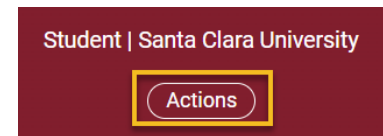


**NOTE:** If the student has a preferred name that differs from the legal name, the preferred name will be prioritized in searches even if you search by the legal name.

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.



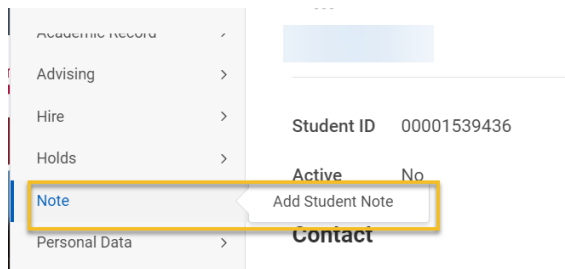
2. In the search results, click the appropriate name to access the student **Profile**.
3. Click the **Actions** button under the student's name.





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

## Add Student Note

A screenshot of the 'Add Student Note' form. The form contains 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 with a toolbar), and Share with Student (dropdown menu showing 'select one'). The 'OK' and 'Cancel' buttons are at the bottom.

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

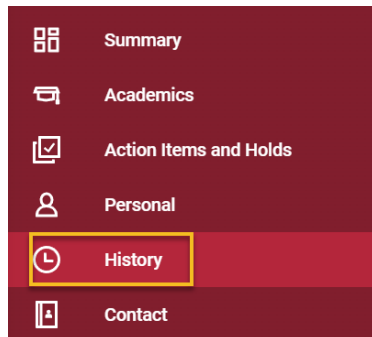


# Add & View Notes to Students

## 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'. A table with the following columns is displayed: 'Creation Date & Time', 'Date & Time', 'Note Category', 'Note Topic(s)', 'Conversation Initiated by', and 'Note Crea'. The table contains one row of data, which is highlighted with a yellow border.

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