



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.

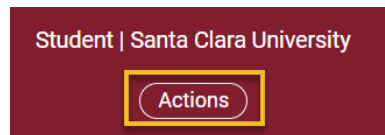
NOTE: Before starting your tasks in Workday Student, follow the set up procedures outlined in the *Getting Started* guide found under *Workday Training and Support* [here](#).

Process: Add Note

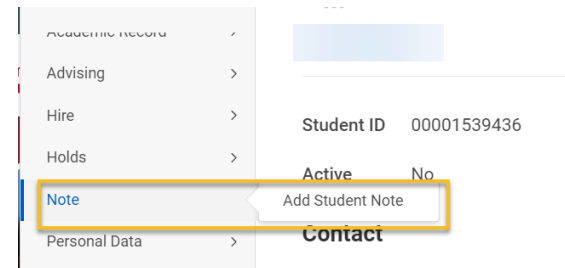
1. Navigate to the **Student Profile** using the instructions [here](#).

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

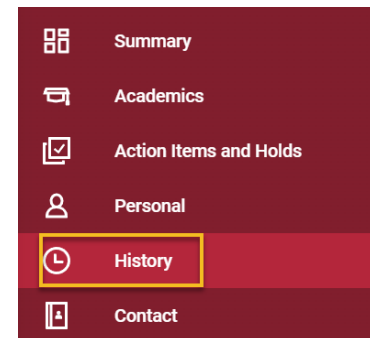
- a. Choose the **Actions** button under the student's name.



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



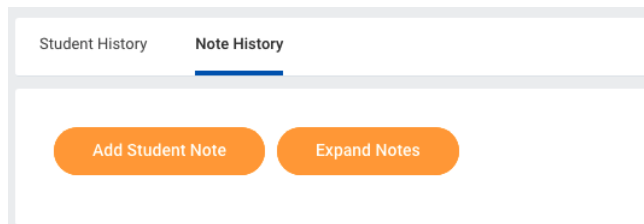
- b. Select **History** from the menu below the student's photo.



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 and a toolbar containing options for Format, Bold (B), Italic (I), Underline (U), Text Color (A), and other icons.
- 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.

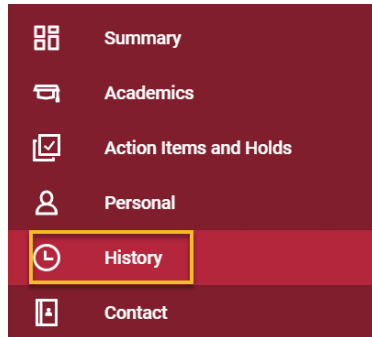
3. When you are finished, click **OK** and **Done**

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.



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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.

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 |