

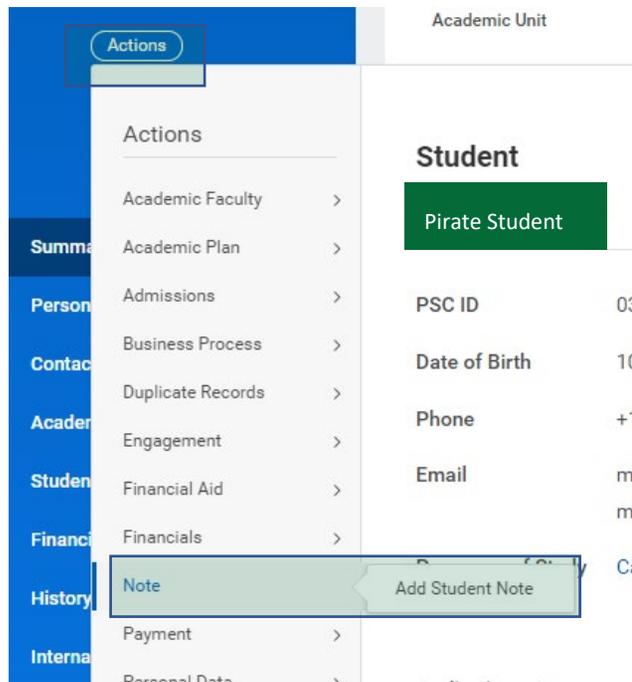
STAFF/FACULTY

Student Notes

1. Type a *student's name* in the search bar found at the top center of any Workday screen.

TIP: Type **Student:** followed by a name for quick results or search directly by the PSC student ID.

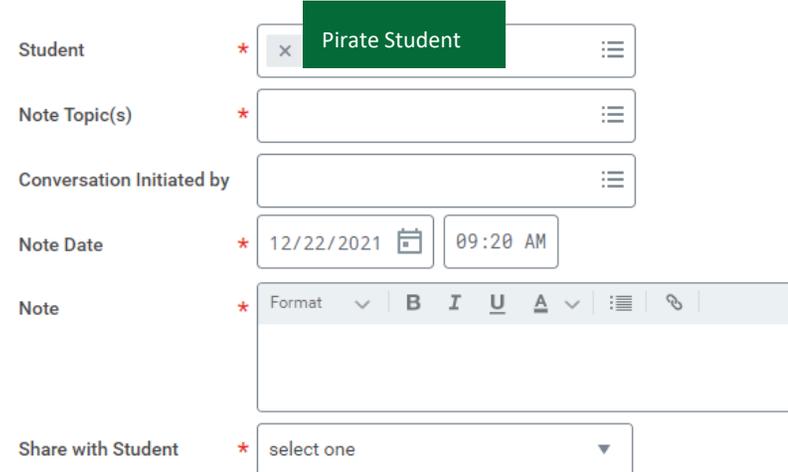
2. Click *Actions*.
3. Hover over *Note* and then click *Add Student Note*.



You can also add and view notes directly from the *Note History* page (see page 2 of this job aid).

4. Fill in the necessary information:
 - **Note Topic:** Select the appropriate topic from the drop-down menu.
 - **Conversation Initiated by:** Indicate who initiated the conversation, if applicable.
 - **Note Date:** Enter the date for the note.
 - **Note:** Enter the text of the note following best practice guidelines.
 - **Share with Student:** Indicate if you want the note to be visible to the Student.

Add Student Note

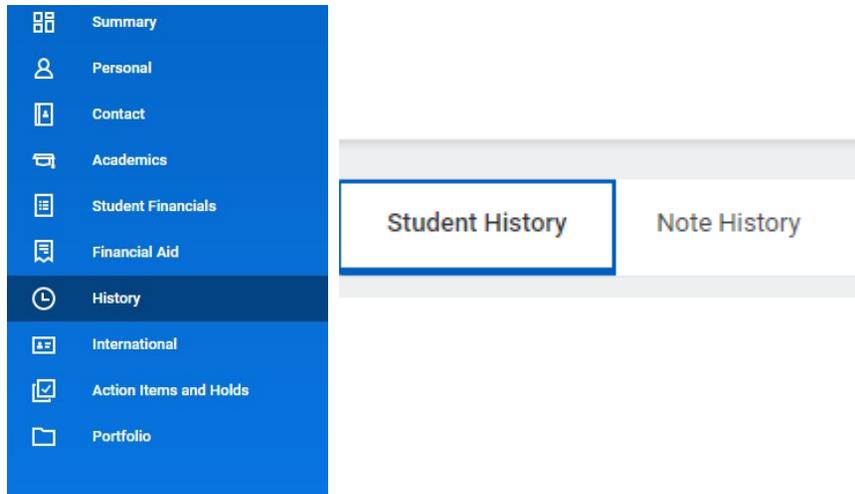


The screenshot shows the 'Add Student Note' form. The 'Student' field is a dropdown menu with 'Pirate Student' selected. The 'Note Topic(s)' field is empty. The 'Conversation Initiated by' field is empty. The 'Note Date' field is a date and time picker set to 12/22/2021 at 09:20 AM. The 'Note' field is a rich text editor with a toolbar containing options for Format, Bold (B), Italic (I), Underline (U), Text Color (A), Bulleted List, and Link. The 'Share with Student' field is a dropdown menu with 'select one' selected.

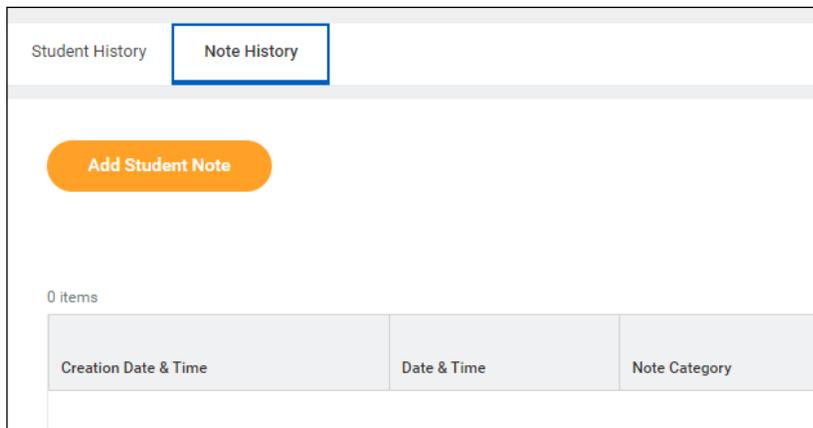
5. Click **OK**.

Another way to add notes is under the *History* tab of a student's profile.

Once you select the *History* tab, the screen will show two tabs: Student History and Note History.



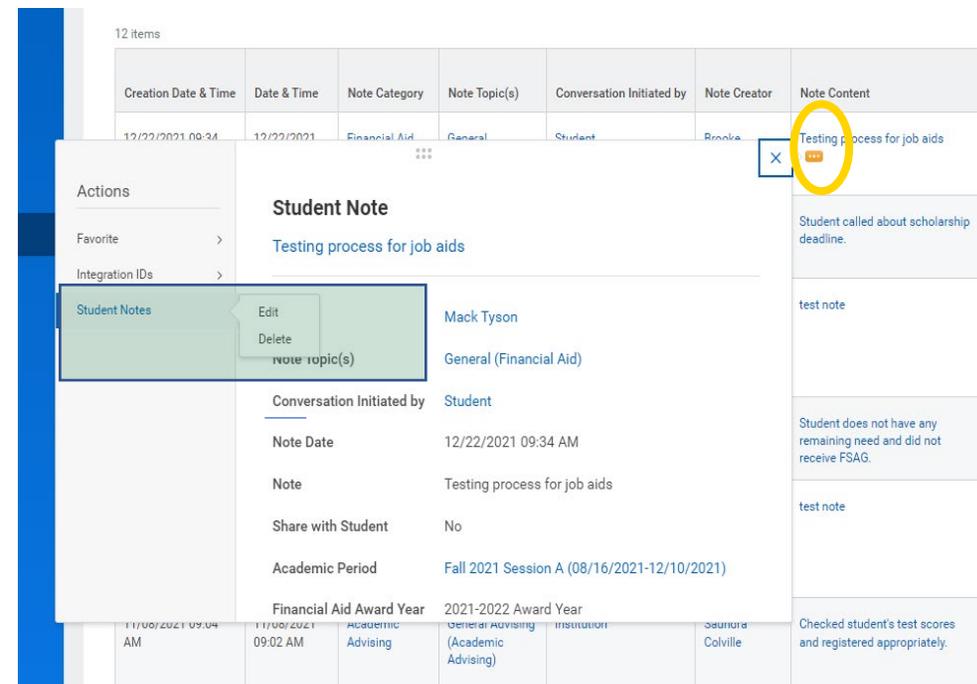
1. Click *Note History*.
2. To add a note, click *Add Student Note*.



3. To view individual notes, click the ellipsis button.



You can also view any Academic Advising, Academic Record, or Financial Account notes shared with you on the *Note History* tab, including the *Creation Date & Time*, *Note Category*, *Note Topic*, *Conversation Initiated by*, *Note Creator*, *Note Content*, *Academic Period*, and *Relates To*. If you click on the text in the *Note Content*, you can see the full text.



You can only edit notes that you have added yourself. Student Records Administrators can delete notes if needed.