HOW TO ENTER NOTES

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REVISION HISTORY

Version	Date	Name	Description
1	2.15.16	Bracken	final

INTRODUCTION AND PURPOSE

Degree Audits are used at UCR as a means for students and staff to track completion of curriculum requirements towards graduation. This procedure provides instruction on how to enter, view and delete notes related to a student's degree requirements.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Notes may only be modified by the original submitter.
2. All notes should be entered with objectivity and professionalism. FERPA gives students the right to review their record.
3. In general, notes should only be deleted on rare circumstances due to incorrect entries or typographical errors. All notes are considered to be a permanent record of a students' audit.
4. Notes entered into Degree Works should be degree audit or Degree Works plan related comments only. Other administrative notes are placed elsewhere.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Graduate Division Academic Affairs
2. College Offices
3. Academic Departments

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Degree Works (https://degreeworkstest.ucr.edu//) to follow along.

FORMS

The degree audit is located within Degree Works. There are no forms in Degree Works.

PROCEDURES

VIEW NOTES

STEPS

1. Notes saved to a student's record are visible in the following worksheet formats: the Registrar Report, Student View, and Diagnostics Report worksheet formats.
2. You can also go directly to the **Notes tab** and click **View Notes** to see a list of existing notes for the student.

ADDING NOTES

STEPS

1. From the **Notes tab** click **Add Note**. Tip: You can also access Notes using the paper/pencil icon near the student data fields at the top of Degree Works.

2. Adding Pre-defined Notes
   a. Select a predefined note from the drop-down list. Predefined notes can be edited.
   b. Although there is an option to choose 'Not available to student,' the notes will be seen by other staff members and in certain circumstances, students, so please use factual, objective, friendly, and professional language.
   c. When done, click **Save Note**.

d.   The following message will display confirming the note was saved.

e.   At this point you can choose to refresh the audit to see the notes reflected on the report by clicking **Run New Audit** or clicking *Add Note* to add an additional note.

3.   Free-form Notes
   a.   A note can be expanded upon up to 2,016 characters.
   b.   A free-form note can be created by clicking directly into the empty box below the predefined drop-down list and typing your note. You can also edit the pre-defined note after selecting it, as shown below.
   c.   When finished, click **Save Note**.

4.   Notes Using the Paper/Pencil Icon.

a.   You may find the need to add a note while on any of the other Degree Works tabs such as Worksheets, Plans, Exceptions, or GPA Calc. To do so without having to navigate away from where you are, click on the paper/pencil icon.
   b.   A pop-up window will display enabling you to add a note and stay on the page you are in.

c. Make your selection and click **Save Note**.
d. The window will refresh momentarily to display the message below letting you know that the note was added successfully. The message will disappear after a few seconds and the default view shown above will reappear.
e. The window can then be closed or another note can be added.
f. A new audit will need to be processed to see the notes displayed.

ADDING NOTES FOR STUDENTS WITH MORE THAN ONE DEGREE OR MAJOR

STEPS

1. Notes entered on graduate level audits will be visible on all graduate audits regardless of degree or major; the same goes for undergraduate level audits.

2. If the student is earning more than one degree a new audit will need to be processed for each in order to view the added note.
   a. After entering a note and running a new audit, you'll need to toggle to the second degree, click on the Worksheets tab, then click on Process New to see the note applied to the secondary degree audit.
3. When entering notes for students with double majors specify which major the note belongs to.

MODIFYING NOTES

STEPS

1. Most of the time notes should not be modified in order to keep an accurate record of what took place. Instead of modifying a note, add information by creating a new note. A good example of when to modify a note would be to correct a misspelled word.
   Note: **Modifying a note does not change the creation date**. Therefore, it is a good idea to add a new note instead.
2. From the **Notes tab** click **Modify Notes**.
3. Only the notes the user has access to modify will be displayed.
4. To modify a note, click in the text box for the note you wish to modify and enter your changes.
5. If you did not mark "Not available to student" as indicated in the Add Note section you can make that selection here by clicking the box next to the note under the Internal column.
6. To save your modifications, **click the paper/pencil icon located to the left of the note**. This will save the changes.

DELETING NOTES

STEPS

1. Notes should *only* be deleted when an incorrect entry or typo has occurred. All notes are considered to be part of the student's permanent record.
2. From the Notes tab click **Delete Notes**.
3. To delete a note click the note icon located to the left of the note to be deleted. Even though you can view all notes in the *Delete Notes* window, **you can only delete the notes you have added**.
4. Your mouse pointer will change to a hand icon 🖑 when hovering over the note icon, indicating you can delete the note.
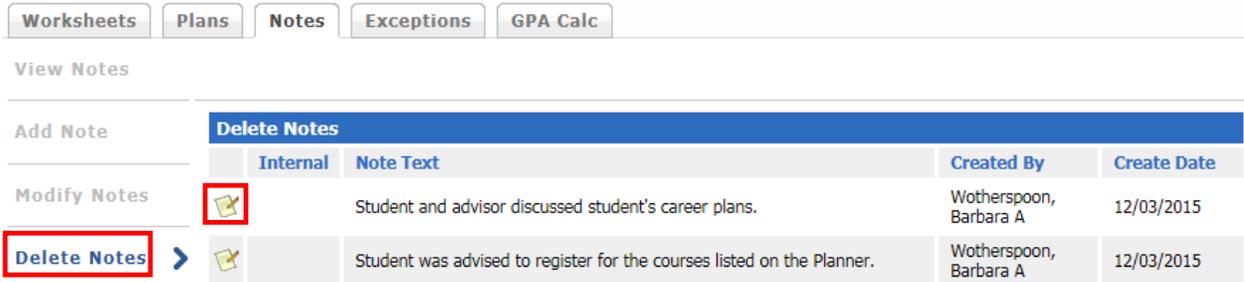
Delete Notes				
	Internal	**Note Text**	**Created By**	**Create Date**
📝		Student and advisor discussed student's career plans.	Wotherspoon, Barbara A	12/03/2015
📝		Student was advised to register for the courses listed on the Planner.	Wotherspoon, Barbara A	12/03/2015

5. A note deletion message will display confirming the note was deleted.
6. At this point you can choose to run a new audit to see the deletion of the note reflected on the report by clicking **Run New Audit** or clicking *Delete Notes* to delete an additional note.
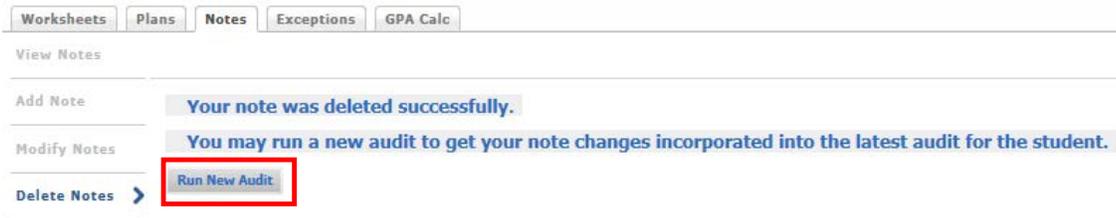
Your note was deleted successfully.

You may run a new audit to get your note changes incorporated into the latest audit for the student.

Run New Audit

PRECAUTIONS/ADVISEMENT ON NOTES

Notes marked as **Not available to student** in the Add Note section or as **Internal** in the Modify Notes section will show on audit reports printed (including PDFs) by non-student users such as advisors, faculty members, or Registrars. Hence, if a student visits an advisor or faculty member and that person prints an audit report for that student, all notes flagged as unavailable as previously described will be visible to that student. The View Notes section will show an indicator that it is flagged as Internal to help remind users.
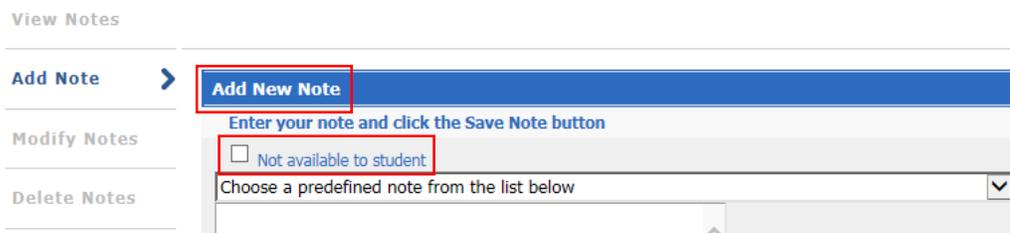
Add New Note

Enter your note and click the Save Note button

☐ Not available to student

Choose a predefined note from the list below

FINAL QUIZ

1. Can pre-defined notes be modified? Yes or No
   a. YES
2. Do you have to Run New Audit for the notes to show in the degree Audit? Yes or No
   a. YES
3. Notes entered on graduate level audits will be visible on all graduate audits regardless of degree or major; the same goes for undergraduate level audits.
   a. TRUE
4. Notes should *only* be deleted when an incorrect entry or typo has occurred. All notes are considered to be part of the student's permanent record.
   a. TRUE
5. Modifying a note does not change the creation date. Therefore, it is a good idea to add a new note instead.
   a. TRUE