

Add Student Recruiting Note

PURPOSE

The purpose of this job aid is to document conversations with the student through Student Recruiting Note. Only Supervisors will have access to edit the Engagement Conversations.

TASK WITHIN THIS JOB AID

Add Student Recruiting Note

PROCEDURE

Step 1	Find student and click Actions button next to person's name	
Step 2	Hover over Note and select Add Student Recruiting Note	
	Individual of the served of	Student Tron, Pr Recruitments 1 item Student Recruiting Note
	Anticipated Start Process History >	
Step 3	Add Student Recruiting Note Student * Tron, Prospect Recruitment * Prospect Tron Topics Image: Conversation Initiated by Privacy Settings Private (Student Recruiting Only) Public Date Date * 02/26/2018 Note * Format BIUA * Image: State	Select Topics drop down menu and choose category: Student Recruiting

Page 1 | 2 Add Student Recruiting Note Created 02/26/2018



Step 4	Select the student recruiting topic that applies to the outcome of your outreach	
	Add Student Recruiting Note	
	Student*Tron, ProspectRecruitment*Prospect TronTopicssearchImage: Conversation Initiated by< Student RecruitingPrivacy SettingsImage: Conversation Initiated by< Phone Call Successful (Spoke)Privacy SettingsImage: Conversation Initiated by< Student RecruitingDate*Image: Conversation Initiated byMimNote*Tell Us More About YourselfMim	
	 Phone Call Successful – if you spoke to the Student/Prospect Phone Call Unsuccessful (no contact) – if you did not speak to the Student/Prospect and could not leave a voice message Phone Call Unsuccessful (voicemail) – if you left a voice message [There's no need to use "Tell Us More About Yourself"] 	
Step 5	Select Conversation Initiated by drop down menu and choose Institution (if you called the Student/Prospect) or Student (if they called you.)	
Step 6	Select Privacy Setting - Public	
Step 7	Add Note	
Step 8	Click OK	

