

# Writing Workflow Notes

Writing notes is a critical piece of every workflow. Write notes for each step regarding the verification of information, any communications with the member, the reason for a step being completed or snoozed, and any other relevant details. Write notes with enough details so any staff member or volunteer can take over the workflow for you if you are out of the office.

When writing a note, do NOT click the "Save this note to profile" checkbox.

## Correct:

The screenshot shows the 'Add internal note' interface. At the top, there are two tabs: 'Add internal note' (active) and 'Send email'. Below the tabs is a text input field labeled 'Your note'. To the right of the input field is a 'Save note' button. Below the input field is a checkbox labeled 'Save this note to Fitzwilliam's profile', which is unchecked. Below the checkbox is a small text block: 'This note will be visible to anyone who can see this card. Sent messages and email replies will appear in the card history below.' To the right of the input field and checkbox is a 'Save note' button. On the right side of the interface, there is a section titled 'Currently assigned to Lizzy Darcy' with a 'Reassign card' button and a 'Pin assignment' checkbox. Below this is a 'Snooze...' dropdown menu, a 'Remove Fitzwilliam from workflow' button, and a 'Skip this step' button. At the bottom, there is a 'CARD HISTORY' section with two entries: 'A notification email was sent to Lizzy Darcy. 6 hours ago' and 'Lizzy Darcy was automatically assigned to this card. 7 hours ago'.

## Incorrect:

The screenshot shows the 'Add internal note' interface. At the top, there are two tabs: 'Add internal note' (active) and 'Send email'. Below the tabs is a text input field labeled 'Your note'. To the right of the input field is a 'Save note' button. Below the input field is a checkbox labeled 'Save this note to Fitzwilliam's profile', which is checked. Below the checkbox is a dropdown menu labeled 'Choose a note category'. Below the dropdown menu is a small text block: 'This note will be visible to anyone who can see this card or note category. Sent messages and email replies will appear in the card history below.' To the right of the input field and dropdown menu is a 'Save note' button. On the right side of the interface, there is a section titled 'Currently assigned to Lizzy Darcy' with a 'Reassign card' button and a 'Pin assignment' checkbox. Below this is a 'Snooze...' dropdown menu, a 'Remove Fitzwilliam from workflow' button, and a 'Skip this step' button. At the bottom, there is a 'CARD HISTORY' section with two entries: 'A notification email was sent to Lizzy Darcy. 7 hours ago' and 'Lizzy Darcy was automatically assigned to this card.'