Slate — Add Custom Interactions to Records

You will need:

- Internet connection
- Your JHED ID and password
- Web browser: Firefox, Safari or Chrome
Add Custom Interactions to Records

The following custom interactions have been added to the database for your use:

- Contact > Phone Call
- Contact > Email
- Contact > Meeting

This guide will demonstrate how to add a custom interaction to a record.
1. **https://applygrad.jhu.edu/manage**

Enter your JHED credentials.
2. Click Records.

3. Lookup record.
4. Click Timeline.

5. Click Interactions followed by New Interaction.
Complete the interaction form; click *Save* when complete.

*User* - this will default to the user name.

*Code* - select the parent code of the interaction.

*Date* - this will default to the current time, but can be overridden.

*Subject* - the subject will be visible on the student record.

If the interaction code is sufficient, leave this blank.

*Private Comments* - private comments are only visible administratively.

*Public* - Leave this setting unchecked. If checked, comment here will be made public.

Note—Use the *Search Interactions* box or toggle on the interaction types by using checkboxes to easily find specific interactions on the student record. A list of interactions based on Parent Codes may also be displayed.