

City Tech Navigate Advising Records - Using Appointments

Users are encouraged to document all interactions with their students. Well done documentation provides continuity and consistency in advising and support, increases communication between departments, and improves campus professionals' relationships with students.

Appointments

- Recommended over Notes
- Tied to specific encounter
- Document date/time/reason
- Why did student seek help?
- Advice, recommendations, follow-up actions
- Part of student's academic record
- Student has right to access this information

When making notes or reports in Navigate, be aware of privacy rights and concerns.

FERPA

- Include only information appropriate staff will need to know in order to serve the student
- Content is available to students through open records requests or court subpoenas
- Assume student, parent, staff, faculty, student assistants can read everything
- Describe, but don't evaluate
- When in doubt, leave it out

Avoid

- Content student would feel is sensitive or private
- Medical, mental health concerns
- Instructor conflicts
- Student conduct or legal issues
- Family or relationship problems

Ask Your Self

- Is this something the student would WANT others to know?
- Is this something another staff NEEDS to know?
- Is this something it is within the scope of my role to say?
- Are all the details based on facts?

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Do

Briefly summarize what was discussed for future reference, ensuring fact-based, general language. May include recommendations, advice, referrals, action plans, and positive behaviors.

For example:

- Recommended student take PSYCH 156.
- Referred to Career Services.
- Student is concerned about two courses.
- Student will follow up with me after registration.
- Student reported extenuating circumstances related to progress this term.
- Student discussed a difficult situation and requested assistance from campus resources.
- Referred student to _____program/dept.
- Student is considering declaring a major.

Do Not

Summarize everything that was discussed. Not all discussion items are intended to be shared or recorded. Should not include sensitive information, subjective opinions, and judgements about behaviors.

For example:

- Student does not like MAT 102 instructor.
- Student does not seem motivated.
- Student's parents are going through a divorce.
- Referred to Counseling Center because of relationship problems with significant other.
- Referred to Money Management Center because student has little financial support from family and has debt building up.
- Student has skipped last couple of appointments and isn't serious about planning ahead.

Student has been prepared for our sessions.

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