



## Recording Appointment Reports and Notes in Navigate

The Navigate platform is a web-based Student Success Management System (SSMS) that Eastern Washington University is using to undergird and support what we call the *Student Success Collaborative*. This broader concept of the **Student Success Collaborative** encompasses all of the **people** (staff, faculty, students), **processes** (early warning, appointment reports, etc.) and **technology** (Navigate, Banner, etc.) working in concert and with deep collaboration with the goal of holistically supporting and retaining our students.

The Navigate platform in particular facilitates this campus-wide coordinated student support network by allowing advisors and other professionals to share appointment reports and Notes that document interactions and other relevant information. The benefits of a single, accessible repository for student information include improved communication, coordination, efficiency, transparency, and a more personalized student experience in advising.

*Why should you create an appointment report when meeting with a student?*

- Reminder of the advice given during meetings with students (in person, by email or phone)
- Help advisors and other student support staff communicate and provide consistent, informed service
- Create an “institutional memory” of contacts and recommended actions
- Record valuable data on student use of support services and associated outcomes

*The content of appointment reports aims to communicate:*

- For what was the student seeking help?
- What steps were taken to address the student’s concerns?
- What advice and recommendations were made?
- What are agreed upon follow-up actions? Were specific referrals made?
- Overall, summarize what you discussed as it relates to the student’s success.

*Why should you create a Note?*

- Record important information that you learned outside of an advising appointment (e.g. changes in registration, financial aid, etc.)
- Record the outcomes of your efforts to resolve issues for the student.
- Communicate important notices to the student (You must make the Note visible to the student for this).

*What’s the difference between an appointment report and a Note?*

- appointment reports document important information about advising appointments, such as dates, times, reasons and locations. An appointment report should always be tied to a specific advising encounter between you and a student or group of students.
- Notes describe information about the student that you gained outside of an appointment. They are often more transactional in nature (e.g. Records and Registration, “In compliance with EWU Repeat Policy, student has exhausted maximum allowed.”)



**The Family Educational Rights and Privacy Act (FERPA)** entitles students to access any reports or notes considered part of their academic record. Any appointment reports or Notes created in the Navigate advising platform are considered part of a student's academic record and are accessible by students, open records requests, and court subpoenas. This applies to Notes whether they are designated as shared with students in the platform or not.

## With FERPA in mind:

- ✓ Assume students, parents, or the general public will read anything and everything you have written.
- ✓ When writing your appointment reports and notes, ask yourself the following questions:
  - 1) Is this something the student would want other people to know?
  - 2) Is this something another advisor would need to know? Why?
  - 3) Is this something that is within my scope of practice to say? Do I have the necessary training, and is this something germane to my area of professional expertise?
  - 4) Are the details in my notes based on fact or do they merely represent my own observations, perspectives, guesses, predictions, diagnoses, etc.?



**“Describe, don’t evaluate”**  
**“When in doubt, leave it out”**

- ✓ appointment reports and notes should be academic-related and avoid including personal, potentially sensitive content.
- ✓ Personal and/or sensitive content, whether reported by the student or assumed by you, may include:
  - Medical / mental health concerns
  - Legal problems
  - Relationship problems
  - Family concerns
  - Conflicts with specific instructors
  - Information about academic integrity or student conduct proceedings



## Tips on Recording appointment reports and Notes in Navigate

Do:	Don't:
<b>Briefly summarize what was discussed as it relates to student success for future reference by the student, other support staff, and future advisors:</b> <ul style="list-style-type: none"><li>Recommendations: "Recommended student take MATH 114 to create a more solid mathematic foundation."</li><li>Advice: "Cautioned against taking 18 credits this term given work schedule."</li><li>Referrals: "Referred to Career Services."</li><li>Action Plans: "Student plans to follow up with tutoring and schedule an appointment with me after mid-terms."</li></ul>	<b>Summarize everything that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals, and follow-up plans.</b> <ul style="list-style-type: none"><li>Include unnecessary details: "She said she has been having a good week and is especially excited about moving into a different apartment."</li><li>Include personal/sensitive information: "Student disclosed that she has been visiting the Counseling Center."</li><li>Include subjective opinions.</li></ul>
<b>Summarize specific course recommendations</b> <ul style="list-style-type: none"><li>"Encouraged student to take ENV 100 as a gen ed."</li><li>"Recommended student take BIOL 171 fall quarter 2024."</li></ul>	<b>Report problems with specific instructors</b> <ul style="list-style-type: none"><li>"Student doesn't like his MTHD 103 instructor."</li><li>"Student said PHIL 101 professor has unfair grading policies."</li></ul>
<b>Spell things out for a general audience</b>	<b>Use acronyms students and other campus support staff may not understand</b>
<b>Write fact-based academic-related notes</b> <ul style="list-style-type: none"><li>"Student is concerned about grades in two courses."</li><li>"Student is considering whether his current major is a good fit. Helped him consider other options."</li><li>"Student needs to successfully complete PSYC 101 before taking any upper level PSYC courses."</li></ul>	<b>Include speculation, subjective opinions, or judgments</b> <ul style="list-style-type: none"><li>"I don't think she is very motivated this semester."</li><li>"His personality isn't a good fit for STEM fields. I think he'd feel more at home doing something artistic or creative."</li><li>"She has probably been avoiding BIOL 171 because she struggled with BIOL 100."</li></ul>
<b>Use general or coded language concerning sensitive material</b> <ul style="list-style-type: none"><li>"Student reported <b>extenuating circumstances</b> related to his academic progress this semester."</li><li>"She discussed a <b>difficult situation</b> and requested help from a campus support service."</li><li>"Student disclosed a <b>personal situation</b> that's having an impact on how things are going this semester."</li></ul>	<b>Include sensitive information, personal concerns, private matters</b> <ul style="list-style-type: none"><li>"Student's parents are going through a divorce."</li><li>"She reported she was assaulted by her boyfriend earlier this year."</li><li>"Student was recently diagnosed with an autoimmune disorder."</li></ul>
<b>Record referrals made and resources shared</b> <ul style="list-style-type: none"><li>"Shared information about Counseling and Wellness Services"</li><li>"I discussed resources at Student Accommodations and Support Services."</li><li>"Referred to Financial Aid &amp; Scholarships Office."</li><li>"Referred to PLUS Tutoring."</li></ul>	<b>Report details surrounding sensitive referrals</b> <ul style="list-style-type: none"><li>"He said he can't concentrate because of relationship problems with his girlfriend. I referred him to Counseling and Wellness Services."</li><li>"He said he's been having a lot of headaches lately. I'm concerned something more serious may be going on. I suggested he go to Rockwood Clinic to get it checked out."</li><li>"Little financial support from family. First Generation student with significant debt building up."</li></ul>
<b>Include notes about positive student behaviors</b> <ul style="list-style-type: none"><li>"Student came prepared for session with course plan filled out."</li><li>"He has spent time talking with two Sociology professors to learn more about potentially changing to that major."</li></ul>	<b>Include negative judgements student behaviors</b> <ul style="list-style-type: none"><li>"She seems like she just blows off advising appointments. I can't get her to be serious and plan ahead."</li><li>"He seems pretty uninformed about the real world after college and hasn't followed through with plans to get information from his Sociology professor. I think he needs to be more realistic."</li></ul>