Recording Reports and Notes
NDMU Navigate

Navigate is a new web-based student success tool at Notre Dame of Maryland University.
The platform facilitates a campus-wide coordinated student support network by allowing advisors and other professionals to share Reports and Notes that document interactions and other relevant information. The benefits of a single, accessible repository for Reports and Notes include improved communication, coordination, efficiency, transparency, and a more personalized student experience in supporting students.

Why should you create a Report when meeting with a student?

- Reminder of the advice given during meetings with students (in person, by email or phone)
- Help advisors, professors, 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 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 Report and a Note?
- Reports document important information about appointments, such as dates, times, reasons and locations. A Report should always be tied to a specific 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. the Registrar's office, "In compliance with NDMU's 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 Advising Reports or Notes created in the NDMU EAB 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 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, staff member, or professor 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.?
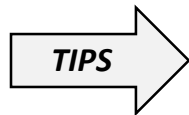
> **TIPS** ➤ **"Describe, don't evaluate"**
> **"When in doubt, leave it out"**

- ✓ 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

Recording Advising Reports and Notes in Navigate

Do	Don't
Briefly summarize what was discussed as it relates to student success for future reference by the student, other support staff, and future advisors:	**Summarize _everything_ that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals, and follow-up plans.**
• Recommendations: "Recommended student take MAT 102 to create a more solid mathematic foundation." • Advice: "Cautioned against taking 18 credits this semester given work schedule." • Referrals: "Referred to Career Services." • Action Plans: "Student plans to follow up with tutoring and schedule an appointment with me after mid-terms.	• Include unnecessary details: "She said she has been having a good week and is especially excited about moving into a different apartment." • Include personal/sensitive information: "Student disclosed that she has been visiting the Counseling Center." • Include subjective opinions.
Summarize specific course recommendations	**Report problems with specific instructors**
• "Encouraged student to take HIS 120 as a gen ed." • "Recommended student take BIO 135 fall semester 2017."	• "Student doesn't like his MAT 102 instructor." • "Student said PHL 101 professor has unfair grading policies."

Spell things out for a general audience	**Use acronyms students and other campus support staff may not understand**
Write fact-based academic-related notes	**Include speculation, subjective opinions, or judgments**
• "Student is concerned about grades in two courses." • "Student is considering whether his current major is a good fit. Helped him consider other options." • "Student needs to successfully complete PSY 101 before taking any upper level PSY courses."	• "I don't think she is very motivated this semester." • "His personality isn't a good fit for STEM fields. I think he'd feel more at home doing something artistic or creative." • "She has probably been avoiding BIOL 136 because she struggled with BIO 135."
Use general or coded language concerning sensitive material	**Include sensitive information, personal concerns, private matters**
• "Student reported **extenuating circumstances** related to his academic progress this semester." • "She discussed a **difficult situation** and requested help from a campus support service." • "Student disclosed a **personal situation** that's having an impact on how things are going this semester."	• "Student's parents are going through a divorce." • "She reported she was assaulted by her boyfriend earlier this year." • "Student was recently diagnosed with an autoimmune disorder."
Record referrals made and resources shared	**Report details surrounding sensitive referrals**
• "Shared information about the Counseling Center." • "I discussed resources at Student Health Service." • "Referred to Financial Aid Office." • "Referred to Office of Student Success."	• "He said he can't concentrate because of relationship problems with his girlfriend. I referred him to the Counseling Center." • "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 Student Health Service to get it checked out." • "Little financial support from family. First Generation student with significant debt building up."
Include notes about positive student behaviors	**Include negative judgements student behaviors**
• "Student came prepared for session with course plan filled out." • "He has spent time talking with two Sociology professors to learn more about potentially changing to that major."	• "She seems like she just blows off advising appointments. I can't get her to be serious and plan ahead." • "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."