Note-Taking in Navigate

- Notes offer an additional mechanism to jot down information about a student, collaborate across Care Units, and create a record of information provided directly to the student.
- 'Electronic sticky note' –can be filed at any time about a student, about appointments or other need-to-know items for other advisors.
- Visibility-You can choose whether to share note with student, including links and attachments
- Use-Add student-facing attachments (degree audits, registration pins) or other helpful information that is unrelated to a specific appointment.

What Information Is Included?

- Notes should only contain general information related to that student such as their degree plans or documentation.
- No information specific to an appointment should be included in a Note – please enter that information into an Appointment Summary Report instead.
- Within a Note, you can include the following information:

Note (free text)

Attachments

Note Reason

Note URL–Visibility (private and/or visible to the student)

How Do I Create This Documentation?

There are several different ways to create Notes:

You will notice that 'Note" is an option in the Actions dropdown bar throughout the platform. The easiest way to create a Note is from your **Staff** homepage or a **Student Profile**. On your Staff homepage, under the "Students' tab, find the specific student in your "My Assigned Students" section, or click the dropdown to find the student from one of your saved Lists. From this section, you can click on a student and select "note" from the Actions drop down.
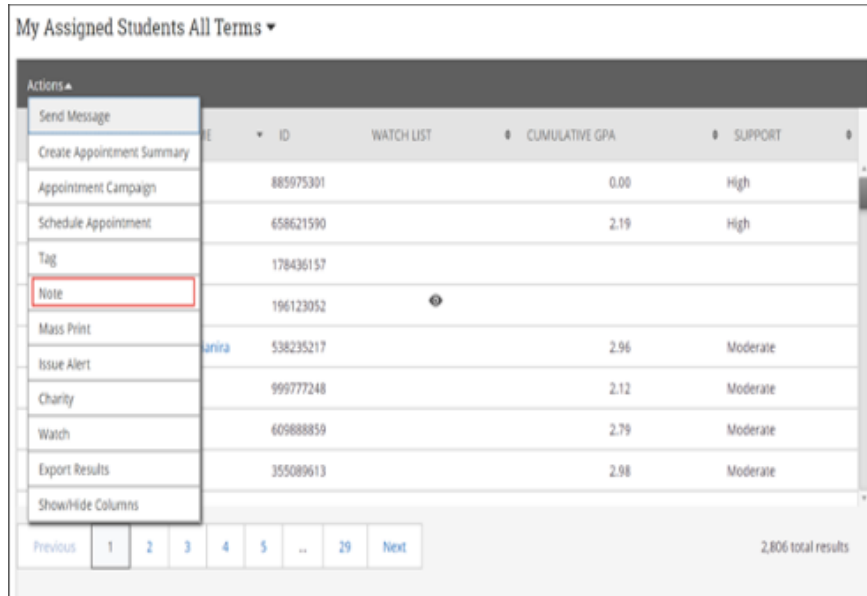
How Do I Create This Documentation?

You can also create a Note from a Student Profile page. Navigate to that specific student's profile and click "Add a Note on this Student" from the Actions menu on the right.

- *Notes are not restricted by Care Unit. Anyone with permission to view Notes and to view the specific student information will be able to view your notes*
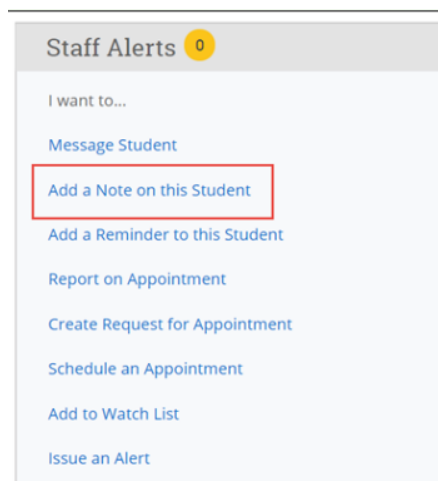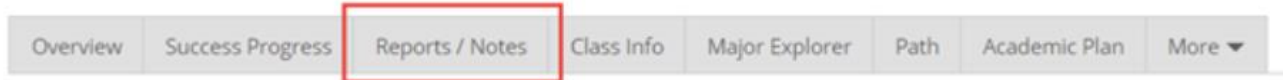
FAQs

Where can I access this documentation in the future?

- All Notes you filed can be found in two areas of the platform-the individual student's profile page or Reports

Are appointment summary reposts and notes part of a student's official record and subject to restrictions under the Family Educational Rights and Privacy Act (FERPA) and local privacy laws?

- Yes! Any information you enter into the Navigate platform pertaining to a student becomes part of their official student record and may be subpoenaed by that student, as outlined in FERPA. Please consult with the Application Administrator for institution-specific guidelines about what information to include (and not include) in the summary reports and notes.

If I mark a note as private, who can view that note?

- A note marked as private is not visible to anyone in the platform other than you. However, it is still part of the student's official educational record and, therefore, included within any student requests for their records. Please be mindful of the information you include within your private notes.