

NOTES AND APPOINTMENT REPORTS



USING NOTES

—IF YOU HAVE ASSIGNED ADVISEES

A **Note** is a broad piece of information about the student and this information is not tied to a specific advising appointment. You may attach documents to this type of note, use it to paste information from an email, or record any type of general information about the student.

1. From the **Staff Home** page, select the student(s) you want to make a Note on from the **My Assigned Students** list.
2. Click the **Actions** button and select **Note**.
3. Select a **Note Reason** and record your note in the text box provided.
4. If you wish to attach a file you may also do this by selecting **Choose File** in the **Attach File** section and following the steps.
Note: In a **Note** you have the ability to make a note visible only to you or visible to the student. If you check nothing in the **Visibility** section, the note is visible to all professional staff and faculty advisors using the Navigate system.
5. Click **Save Note**. If you do not click **Save Note**, the information you typed will not be retained and will not be saved to the student's profile.

Version 1 | Updated October 18, 2019

Staff Home

Students | Upcoming Appointments | My Availability | Appointment Queues

My Assigned Students for Summer 2019 ▼

1.

	STUDENT NAME	ID	WAT
<input type="checkbox"/>	1 Bailey, [redacted]	E [redacted]	
<input type="checkbox"/>	2 Couty, [redacted]	G [redacted]	
<input checked="" type="checkbox"/>	3 Crosby, [redacted]	B [redacted]	

2.

Actions ▼

- Send Message
- Create Appointment Summary
- Appointment Campaign
- Schedule Appointment
- Note**
- Mass Print
- Issue Alert
- Watch
- Export Results
- Show/Hide Columns

ADD A NOTE TO [redacted]

Note (Required)

B **I** [List Icon] [Link Icon] Paragraph [Undo] [Redo]

Enter your notes here!

3.

Note Subject

[Profile Picture] [Redacted]
Sophomore
Pre-Business

Relations

Note Reason
[x] FYA Intervention

Note URL
[Redacted]

Visibility

☐ [Redacted] Only?
☐ [Redacted] ?
☐ Printed Student Report

4.

Attach File Choose File No file chosen

5.

Cancel Save Note





USING NOTES

—IF YOU DO NOT HAVE ASSIGNED ADVISEES

1. Search for the student for which you would like to add a **Note** either by conducting a **Quick Search** (magnifying glass in upper right of Navigate) or an **Advanced Search** (magnifying glass in left navigation bar).
2. Once on the student's profile page, select **Add a Note on this Student** in the far right menu.
3. Complete steps in the above section.

Version 1 / Updated October 18, 2019

1.

Search for the student for which you would like to add a **Note** either by conducting a **Quick Search** (magnifying glass in upper right of Navigate) or an **Advanced Search** (magnifying glass in left navigation bar).

Once on the student's profile page, select **Add a Note on this Student** in the far right menu.

Complete steps in the above section.

2.

Current Alerts 0

I want to...

Message Student

Add a Note on this Student

Add a Reminder to this Student

Report on Appointment

Schedule an Appointment

Add to Watch List

Issue an Alert

Current Alerts 0

I want to...

Message Student

Add a Note on this Student

Add a Reminder to this Student

Report on Appointment

Schedule an Appointment

Add to Watch List

Issue an Alert



USING APPOINTMENT REPORTS

An **Appointment Report** is the record of a specific advising appointment for a student. You may use **Appointment Reports** to check a student in, take notes on the conversation, and develop a record of the appointment.

Appointment Reports can be generated in a variety of ways. How you go about creating a report is largely dependent on your college/office's check-in process for student appointments.

USING CENTRALIZED CHECK-IN PROCESS

1. If you have centralized check-in process, meaning you have a central location/office dedicated to checking in all student appointments, the student will be "checked in" when they arrive and you will see them appear in your **Appointment Queue** icon.
2. Click on the **Appointment Queue** icon and select **Start Appt.**
3. An **Appointment Report** will open (explained on page 6). Much of the information in your **Appointment Report** will be pre-populated for you, but if needed you can edit some of the fields.

1.



Appointment Queue



Melony Stokes

(Current wait: 1 min)



Start Appt

2.

3.

APPOINTMENT REPORT FOR R...

Appointment Details

Care Unit:

Location:

Service:

Course:

Meeting Type:

Date of visit:

Meeting Start Time: to

Attendees

Advisor:

Student:

Checkin: to

Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.

Date: Time:

Appointment Summary

B I

Attachments

No file chosen

An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.



USING APPOINTMENT REPORTS

If a student has made an appointment with you and you do not have a central office/location checking in your appointments, you can check them in yourself and create an [Appointment Summary](#) on your own.

MANUALLY CHECKING-IN THE APPOINTMENT

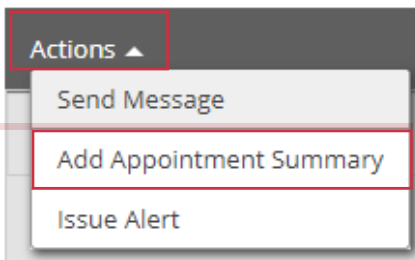
1. From the [Staff Home](#) page, click on the tab for [Upcoming Appointments](#) and select the student you are having the appointment with.
2. Click on the [Actions](#) drop down menu and select [Add Appointment Summary](#).
3. An [Appointment Report](#) will open for you to complete (explained on page 6).

Staff Home

Students **Upcoming Appointments** My Availability Appointment Queues

Upcoming Advising Appointments

Actions ▾ Show Cancelled							
		DATE	ATTENDEE	REASON	COMMENT	REPORT FILED?	DETAILS
1.	<input type="checkbox"/>	1/1	04/11/2017 11:15a - 12:00p	Student	First-Year Advising	Not Yet.	Details





USING APPOINTMENT REPORTS

You may create an **Appointment Report** from scratch, if a student was not checked in for you or if you accidentally closed the **Appointment Report** during your appointment session.

CREATING AN APPOINTMENT REPORT FROM SCRATCH

1. **Search** for the student for which you would like to add an **Appointment Report** either by conducting a **Quick Search** (magnifying glass in upper right of Navigate) or an **Advanced Search** (magnifying glass in left navigation bar).
2. Once on the student's profile page, select **Report on Appointment** in the far right menu.
3. An **Appointment Report** will open for you to complete (explained on page 6).

Version 1 / Updated October 15, 2019

1.

2.

3.

The screenshot shows the EAB Navigate interface for a student profile. The student's name is 'Pre-Business' and their degree is 'No Degree'. The student ID is 'B'. The profile includes a 'Current Alerts' dropdown menu with options: 'I want to...', 'Message Student', 'Add a Note on this Student', 'Add a Reminder to this Student', 'Report on Appointment', 'Schedule an Appointment', 'Add to Watch List', and 'Issue an Alert'. The 'Report on Appointment' option is highlighted. The form for creating an appointment report is shown below, with fields for 'Appointment Date', 'Appointment Time', 'Appointment Location', 'Appointment Type', 'Appointment Status', 'Appointment Notes', and 'Appointment Comments'.



KEY CONTENT FOUND IN THE APPOINTMENT REPORT

If you wish, you can minimize the **Appointment Report** during the session while you speak with the student. However, you may wish to take notes in the **Appointment Report** during the conversation to best capture your dialogue and interaction. Do not “X” the report box out or all of your content will be deleted. Instead fill in all the relevant content and click **Save this Report**.

1. **Location** identifies your location.
2. **Service** provides your intended reason for having this appointment.
3. **Course** allows you to select a course that the student is currently enrolled in.
4. **Meeting Type** allows you to distinguish if this meeting is in-person, by email or by phone.
5. **Date of Visit** provides date of the student’s actual visit to your office.
6. **Meeting Start/End Time** provides the intended time for the appointment.
7. **Attendees** identifies the amount of time the advisor has blocked for this appointment and the length of time the student was in the appointment. For the student, the **Departed** field should populate itself once you select **Save this Report**.
8. **Appointment Summary** allows you to input notes about the interaction with this student.
9. **Attachments** allows you to attach a file relevant to your student appointment.
10. **Save this Report** allows you to save the content of your report so that the information will be visible on the student’s profile for future reference. **Appointment Reports** are only visible to other professional staff and faculty advisors using Navigate. They are not visible to students.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

APPOINTMENT REPORT FOR R

Appointment Details

Care Unit
Darla Moore School of Business Advising

Location
Darla Moore School of Business (DMSB 301)

Service
First-Year Advising (DMSB)

Course
Start typing to search all courses

Meeting Type
Select Meeting Type

Date of visit

Meeting Start Time
11:06am

Meeting End Time
to

Attendees

Advisor
Attended

Sophomore Pre-Business
Attended

Checkin to Checkout

Suggested Followup
This will be saved on the report as a suggestion. No appointment will be created.

Date Time

Appointment Summary

B I Paragraph

Attachments

Attach File
Choose File No file chosen

An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

Save this Report

8.

9.

10.



NOTE-TAKING TIPS

APPOINTMENT REPORT VERSUS NOTES

In general, use the **Appointment Report** option when the notes you are taking are related to a specific advising meeting. The notes should keep track of the length of your appointment, its location, the type of appointment you are holding, and any pertinent information that was discussed.

Use the **Notes** option when you are adding notes on a student that does not pertain to a specific appointment. These could include information from emails, phone calls, or general data that you wish to record.

USING GOOD JUDGEMENT WITH NOTE-TAKING

1. Notes should always be objective information rather than subjective opinion.
2. Advising notes become part of the student's permanent academic record and can be made available through the Freedom of Information Act.
3. Write only what you would feel comfortable having the student or parent read.
4. Notes should be kept brief and to the point while still providing context to the advising conversation.
5. Do not share private information shared with you by the student. If you must record a sensitive note, do so in a separate note and select to make that note private and visible only to you.
6. Other offices will generally have access to your notes and should be able to find them of use, particularly when you have made a referral to a campus partner.

Advising Session Scenario	Sample Note
Student discloses they have been sexually assaulted.	Personal Emergency. Filed report with Equal Opportunity Programs.
Student discloses they have recently been diagnosed with bipolar disorder.	Referral to Office of Student Disability Services to complete necessary documentation.
Student discloses they are feeling depressed and having suicidal thoughts.	Mental Health Concern. Referral to the Counseling Center. Filed BIT report.
Student comes in smelling strongly of alcohol, sweating profusely, slurring their words and acting defensively & aggressively.	Mental Health/Behavioral Concern. Filed BIT report.

Do	Don't
Keep notes as brief & succinct as possible	Write in code.
Be specific when describing what was discussed & agreed upon between you & the student	Write subjective comments about the student
Include general information about the student	Include student's comments about faculty or staff, especially negative ones
Provide location for notes entered into additional technology platforms. (i.e. DegreeWorks)	Include personal information about the student that is sensitive
Note all referrals that were made	Include your personal thoughts about the student