

Documenting Student Interactions in Navigate

Plugged into Advising

September 2025



What We'll Go Over Today

- Why documentation matters
- What should and should not go into documentation
- Creating a template
- Sensitive information
- Examples of language changes you can make
- Resources

Documentation Locations & Purposes

Appointment Summaries

Notes

Referrals

Outreach

Why Documentation is Important

coordinated care approach:

When faculty and staff work together to provide holistic support for students that feels seamless

- Creates a record of student interactions and advice provided
- Increases professionals' efficiency and effectiveness
- Refreshes professionals' memory prior to return visits and helps when planning next steps
- Communicates critical information to other university personnel
- Personalizes the student's experience

Good Practice Approach: Use a Template

Discussion Topics: [Brief description of the meeting purpose including specific topics discussed]

Remaining Requirements to Graduate:

- Credits to reach requirement to graduate (ex. 120):
- Pathways courses:
- Major degree core requirements:
- Major required electives:

Tentative Schedule for next semester:

- Course 1: Credits, Notes
- Course 2: Credits, Notes
- Course 3: Credits, Notes
- Course 4: Credits, Notes
- Course 5: Credits, Notes

Future Course Planning:

- [Brief overview of future semester courses; or alternative course options]
- [Advisor Notes on pre-reqs, course sequencing, etc.]

Student's Next Steps:

- Action items required of the student with deadlines to complete
- Follow up required by student or Advisor with clearly communicated instructions on how to check in for updates

Advising Resources:

[Academic Planning Workshops](#)

[Course Catalog](#)

Discussion Topics: Katie wanted to meet today to talk about Spring 2026 classes. Katie plans to study abroad in [Spring](#) semester. We talked about how this may delay graduation due to pre-reqs sequencing for senior seminar

Remaining Requirements to Graduate:

- Credits to reach requirement to graduate (ex. 120): 36
- Pathways courses still needed: 6D, 6A
- Major degree core requirements: Quant., Research Methods, Senior Seminar
- Major required electives: 6 credits of 4000 level courses

Tentative Schedule for next semester:

- Quant. 4 credits (if unable to find abroad, will need to take in summer)
- Pathways 6A
- Pathways 6D
- 4000 level in major elective
- 4000 level in major elective

Future Course Planning:

- Katie will need to take Research Methods in Fall 2026 and Senior Seminar in Spring 2027 to maintain Spring 2027 graduation. This means she may need to complete Quant. In the summer if unable to find an equivalent course for study abroad

Student's Next Steps:

- Check in with Global Education Office about approval for study abroad location
- Check TED to see availability of Pathways 6A, 6D and two major required electives
- Fill out study abroad form (will need to [get syllabus](#) for quant. class)

Advising Resources:

[Transfer Guide](#)

[GEO Forms](#)



What Should Go in Documentation

- 👍 Summarize key topics discussed
 - 👍 Add any next steps and/or resources suggested
 - 👍 Document any cautions (ex. cautioned student that withdrawing will delay graduation)
 - 👍 Include any relevant notes that will help you or other members of the student's Success Team in the future
 - 👍 When submitting a referral, include what you are hoping the referral office can provide the student
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What Should Not Go in Documentation

- ⚠ Personal judgements about the student, especially negative
- ⚠ Comments about a diagnosis or possible diagnosis (you can mention a student is receiving accommodations just not what those accommodations are, specifically)
- ⚠ Comments about a student's personal hardship or concerns (keep these vague, do not mention specifics)

Do not include anything you would not say to the student, directly, even when marking a note as private. All notes are part of the student's record and can be requested at any time.

Create a Template

- Summary of conversation
- Recommendations
- Cautions/warnings
- Links to policies
- Resources shared
- Next steps

Sensitive Information Across all Forms

- Diagnoses (student's or loved one's)
- Medical conditions including mental health
- Financial status or other protected information
- Title IX issues

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Sensitive Information Audits

Why do we complete audits?

- To support the community in managing sensitive information
- To protect student privacy and comply with FERPA
- To advocate for the student perspective

Examples of Language Adjustment

Instead of...	Write...
Student is dealing with depression and anxiety and may withdraw for this semester	Student reported experiencing mental health challenges and is considering withdrawing for the semester. Referred student to Cook and provided W grade policy information
Student's girlfriend broke up with him and he has been hiding in his residence hall for days crying	Student shared they experienced a recent breakup and have had a hard time making it to classes. Talked through options including Cook, tutoring, and speaking with professor
Student's parents are getting divorced and she feels caught in the middle	Student shared a concern in their personal life that she is trying to navigate while maintaining school work and other commitments.
Student wants to switch into X major but I don't think they'll make the grades	Student is hoping to switch into X major. I shared that they will need Y GPA and pre-reqs. We talked about seeing SSC for academic support.



Questions to Ask Before Hitting Submit

- Would you send this directly to the student?
 - Does it summarize the key topics discussed in the conversation?
 - Will it prepare you or a colleague for the next meeting with this student?
 - Can another colleague understand your notes?
 - Is there any unnecessary or personal information?
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Resources

- [Documenting Student Interactions](#)
- [Navigate Training Site in Canvas](#)
- [Advising Technology Website](#)
- [Advising Listserv](#)
- EABHelp@vt.edu