



Guidelines for Documenting Student Interactions in Navigate

(Can be done by entering a Note or an Appointment Summary Report)

Statement of Purpose:

- Documentation of student interactions is a best practice for providing excellent student service as we support students throughout their academic careers.
- Adopting a holistic approach to student success and academic advising allows for intentional, individualized connections between students and the resources, opportunities, and policies of Virginia Tech.
- Recording pertinent student contact in Navigate provides campus partners with consistent, accurate, and seamless documentation that chronicles our students' needs, their progress toward a degree, and their plans for the future.
- A need exists to change the perception that these are “my notes” and “my students.” These are Virginia Tech students, and they are a part of the broader campus community.

Timely, purposeful entries in Navigate:

- **Document** – a record of student interactions and contact, whether face-to-face or via electronic formats
- **Context and history** – allows for expedient and productive student interactions that minimize repetition and redundancy
- **Opportunity** – enhances the advising relationship and strengthens connections with students
- **Information sharing** – a secure, formal means for the sharing information between advisors and students
- **Tracking** – development, learning, and progress towards established benchmarks, patterns in behavior or actions to be taken

Privacy of Student Educational Records:

- “FERPA” stands for the Family Educational Rights and Privacy Act of 1974. This legislation protects the privacy of student records and regulates how information is utilized.
- Employment at Virginia Tech is contingent upon consistent and ongoing FERPA when managing or handling student information

- As with anything containing personally identifiable student information, reports entered into Navigate are part of the student's educational records and subject to FERPA. Training on Virginia Tech's FERPA practices is available through the web-based [Online FERPA Training](#). Be mindful that under FERPA, a student may request access to view their advising notes and appointment summaries. Students must be granted access to their educational records within 45 days of their request, and all records may be subpoenaed in a court of law. All legal requests for student records must be referred to Virginia Tech's general counsel.

General Content & Practice Guidelines:

When preparing to enter a note or appointment summary report in Navigate, ask yourself how the information you intend to enter contributes to the holistic record of a student's academic and career trajectory. Additionally, ask yourself if the information will maintain appropriate levels of disclosure. Fact-based, descriptive information helps convey the unique dynamics of each student advising interaction. Narrative notes are encouraged for readability and nuanced circumstances, but bulleted summaries can also be effective because they may be readily skimmed preparing for an appointment.

The following section presents items for consideration and potential inclusion in Navigate notes and/or appointment summary reports. Please take note that not every item will apply to all circumstances or advising conversations; these are intended to be guidelines for determining what is necessary or appropriate for each interaction.

- **Focus on facts and events.** Summarize conversations. Provide information that would/will allow a campus colleague to contextualize the student's circumstances and the related advice offered. Use objective, non-emotional language. Do not attribute behaviors or intent to the facts.
- **Include relevant information** regarding student's progress towards a degree or career goals, university benchmarks (e.g. completion of general education coursework), prerequisites, or major components.
- **Comment on recommended courses or alternative courses** you and the student discussed and how those courses may affect progress towards degree completion and/or major exploration.
- If you speculate about an outcome/impact of an action or decision, **be clear with the student (and in your note or appointment summary report) to acknowledge the hypothetical nature of your conversation.** Make no overt promises if you cannot guarantee the results. Keep in mind that almost no results are guaranteed.
- **Document discussions** of university policies and academic regulations.
- **Cite actions** that were requested by the student and require follow-up.

- **For referrals, include context** to allow the third party to act with clarity and purpose in their interaction with the shared student.
- **Document communications outside of advising appointments** that are relevant to student's academic record (e.g. a phone call about how to withdraw from a course, an inquiry about an academic regulation)
- **Note transitions** (e.g. transfer in/out of a college or the institution; Withdrawal from the University; a decision to take leave of absence).
- **Note exceptions granted** including why and on what basis they were approved/ implemented, as well as who approved the exception (if approval was needed).
- **Make note of student opinions or decisions** related to recommendations an advisor made during a current or previous advising appointment (adoption or rejection)
- **Note opportunities suggested** or asked about by the student which may reinforce in-class learning and engagement (e.g. volunteer experience, leadership experience, internships)
- **Document attributes disclosed by the student** that may assist with reference letters or scholarship letters and which add value to the advising relationship and future interactions (e.g. student's interests, student's aspirations, student's involvement, or student's experiences).
- **Note reminders for future term considerations.**
- **In the case of a substantive email, enter a summary in Navigate** or, if the entire message is relevant to the academic record, copy the content into Navigate.
- **If noting a change in behavior or concern, report your observation, not accusation or judgment.**
Subjective comments or speculations about a student's motivations, concerns, or abilities are not appropriate for inclusion in an advising report summary

Areas of Concern & Increased Sensitivity

- If recording student's comments about coursework, perceptions, experiences, etc., **employ phrasing to the effect of the student "reported", "stated," or "expressed."**
- Information about other students should not be included.
- If recording information, conversations, or referrals of a highly personal or sensitive nature exercise care with the language used: report academically relevant facts. Focus on steps already taken or steps that are necessary to address the circumstance. **DO NOT diagnose, assess, or offer judgment on the student or their circumstances.** Without recording explicit details consider merely listing the office involved (USFA, SSD, Cook Counseling, etc.) as a prompt to future follow-up or check-in. Alternatively, you might

elect to employ a generic statement (e.g. “Student reported facing a challenging circumstance. Referred student to [name of department/office].”)

- If a student discloses an incident related to sexual harassment or assault, or any other events that are covered by Title IX, include in your advising report summary something to the effect of “Student disclosed information that is covered by Title IX and Virginia Tech’s University Policy 1025.”
 - **Include NO other details about the student’s disclosure**
 - **Do not promise confidentiality to the student. If confidentiality is important to the student, please recommend they speak with campus partners at the Office of the Dean of Students, the Cook Counseling Center, or the Women’s Center.**

Remember the NOTES Framework!

Needs analysis

- What does the student need or want to accomplish? What are their goals for this interaction?

Options/opportunities

- What options or opportunities might the student consider?

Timeline for action

- How long does the student have or when should they act on your advice?

Educate the student about referrals or resources

- Who are the campus partners who might assist? What resources are available to the student?

Schedule a follow-up

- When will you and the student meet to revisit this interaction/conversation?