# Navigate: Rules for Notes

| DO | DO NOT |
|---|---|
| **Briefly summarize what was discussed as it relates to student success for reference by the student, support staff, and future advisors:** | **Summarize *everything* that was discussed. Notes are intended to briefly record recommendations, referrals, and follow-up plans.** |
| Recommendations – "Recommended student take MA116 because of her interest in engineering."<br><br>Advice – "Cautioned against taking 18 credit hours this semester, given student's work schedule."<br><br>Referrals – "Referred student to Career Services."<br><br>Action Plans – "Student plans to follow up with the Tutoring & Writing Center, and schedule an appointment with me after mid-terms." | Include unnecessary details: "Student said she has been having a good week and is especially excited about moving into a different apartment."<br><br>Include personal/medical/sensitive information – see examples below.<br><br>Include subjective opinions – see examples below. |

| Summarize specific course recommendations | Report issues with specific instructors |
|---|---|
| "Encouraged student to take HI111 as a general education course."<br><br>"Recommended student take BI275 during the fall 2016 semester." | "Student doesn't like his MA090 instructor."<br><br>"Student said PY100 professor has unfair grading policies." |

| Write fact-based, academic-related notes | Include speculation, subjective opinions, or judgements |
|---|---|
| "Student is concerned about grades in two courses."<br><br>"Student is considering whether his current major is a good fit. Helped him consider other options." | "I don't think she is very motivated this semester."<br><br>"His personality isn't a good fit for STEM fields. I think he'd feel more at home doing something artistic or creative." |

| Summarize obstacles to student's academic performance | Include personal medical information or speculate on diagnoses |
|---|---|
| "Student indicated transportation issues with getting to class. Referred to Metro Pass."<br><br>"Student shared that they have been ill/are experiencing medical issues. Referred student to Student Health/Counseling Services." | "Student shared that they are homeless."<br><br>"Student expressed that they have COVID-19, and I think that they are also suffering from depression." |

*Last Updated 1.25.23

| DO | DO NOT |
|---|---|
| **Include notes about positive student behaviors** | **Include notes about negative student behaviors** |
| "Student came prepared for advising session with course plan filled out."<br><br>"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."<br><br>"He seems pretty uninformed about the real world after college. I think he needs to be more realistic." |

*As a reminder, all notes entered into the Navigate Platform are a part of the student's academic record.  If a student requests to see their full academic record, all information entered will be released to them.

*Last Updated 1.25.23