

Goucher Navigate

Communication Information & Guidelines – August 2023

Goucher Navigate provides a more seamless way for campus offices to organize and share electronic communications regarding undergraduate students. Given the broad-based implementation of Goucher Navigate, it is important that each user read and understand the guidelines noted below.

Benefits of Notes & Appointment Summary Reports

Advisors and personnel in student support units are encouraged to document their appointments with students using Appointment Summary Reports. Documentation provides continuity and consistency in advising, helps hold students accountable for next steps, and increases communication across departments and divisions. Additionally, these reports can help us determine important student touch points and interactions in the case of emergencies, student withdrawals, and longitudinal data.

Appointment Summary Reports Feature

An appointment summary report in Goucher Navigate is a summary of your meeting with a student, typically written immediately after the appointment. There are four free form text boxes where you can write short responses to the topics listed in each box, such as (for faculty advisors) academic/career goals discussed; barriers to progress you noted; degree progress or next steps discussed; and any recommendations or referrals you made. There is also an open box for additional notes. Checking yes/no on the six radio buttons will help you to keep your notes short and will provide the college with data about students. Appointment summary reports are not visible to the student, but are viewable by other staff and faculty, based on role. Please be sure to use appropriate note taking practices and remain compliant with FERPA (Family Educational Rights and Privacy Act) regulations when writing and reading appointment summary reports.

Appointment Summary Reports are editable by the creator of the report but cannot be deleted (except by a system administrator).

Notes Feature

The notes feature is designed to leave notes about a student that do not represent direct communication with the student, and that would be helpful to another advisor or student support personnel. You can use a note to record the outcome of your efforts to resolve issues for a student. The notes feature has an option to make a note visible to the student, should you wish to use it to communicate an important notice to them. Please use discretion when writing notes and making them visible to students, as this should not be our primary method of communication with students and colleagues.

Notes are editable by the creator of the note but cannot be deleted (except by a system administrator).

Texting Feature

Goucher Navigate can send SMS (text) messages to students. Students who sign up for appointments via Goucher Navigate will receive automated text message reminders of their appointment. Few offices can send text messages to students via Navigate and should only do so to communicate immediate reminders, registration information, or appointment reminders. Students receive the message as a text message or as an email message, if they have opted out of text messaging.

FERPA Regulations

Advisor notes and appointment summary reports in Goucher Navigate are to be kept in accordance with existing FERPA laws. For details, visit <https://www.goucher.edu/registrar/ferpa-information/>. Students may request access to these notes, and they can be subpoenaed by third parties under FERPA guidelines. [SEP]

Academic Leadership Role at Goucher

The persons who have been designated with an Academic Leadership role within Goucher Navigate include the Provost, Vice President for Student Affairs, Vice President for Enrollment Management, and Associate Vice President for Student Success; as well, each Assistant/Associate Provost in the academic division, the Dean of Students and each Associate Dean in student affairs, Director for Academic Advising and Support, Director for Retention and Student Success, and Associate Director for Student Support and Outreach. Because of their role in assessment, the Office of Institutional Effectiveness has access to the Academic Leadership role for analytics purposes.

Goucher Navigate Guidelines

- All staff and faculty who use Navigate for appointments should be creating Appointment Summary Reports regularly after their meeting with a student has concluded.
- When including a note or appointment summary report in Goucher Navigate, keep in mind that anyone who has access to Goucher Navigate may have access to view the note or report. It is best to assume that all Goucher Navigate is visible to any faculty, advisor, or staff member who has been granted access. [SEP]
- Appointment Summary Reports should summarize a meeting, phone call, or other student communication and provide adequate information to benefit other advisors or staff who may see the student in a future interaction. [SEP]
- Notes should summarize valuable information about a student and provide adequate information to benefit other staff who may see the student in a future interaction.

- You can inform students that academically pertinent notes are being recorded and stored in a student database, and viewable by academic leaders, academic advisors, and a small number of student support personnel.
- Sensitive information should only be included when academically relevant and handled with discretion, given that all advisors with Goucher Navigate access may view the student's advising history. It is best to note sensitive information using general terms (family, financial, academic, personal, or health) without going into detail. ^[L]_[SEP]
- Keep appointment records brief and relevant and use only the most understood abbreviations. Use a professional, non-judgmental tone when writing, recording facts or student's own language. Do NOT document inferences or assumptions. For example, instead of writing, "Student seems depressed" or "Student appears anxious", state "Student talked about personal issues which are currently stressors."
- Record information that the student communicates to you in their words. For example, "Student reports that she will be withdrawing for health reasons."
- Document information discussed regarding college and department policies and deadlines. For example, "Student inquired about withdrawing from a class. Explained procedure and informed student of the upcoming deadline."
- Document referrals to other departments, including campus offices such as the Counseling Center, Student Support and Outreach, Accessibility Services, Academic Center for Excellence (ACE), Writing Center, QR (Quantitative Reasoning) Center, Career Education Office (CEO), etc., as well as academic departments, but not include sensitive information related to the concern.
 - Communicate to students that you may share that information with other staff to help, and then follow up with a referral alert or wellness alert via Navigate. Use this [reference guide](#) to understand who receives and manages different referrals and alerts in Navigate.
- When reviewing the advising record history on a student, please use good judgment should you speak with that student. For example, it may not be appropriate to ask about referrals suggested by a previous advisor, depending on the subject's sensitivity.
- Since faculty members who serve as major advisors (and have access to Goucher Navigate) may also serve as a student's instructor, please include only general information when writing an appointment summary report about certain academic issues. For example, if a student discusses a specific course withdrawal or expresses a concern about an advisor or faculty member, do not include the specific course or advisor/faculty member in the report.
- **Individuals who have access to Goucher Navigate should not typically share information learned from Goucher Navigate with anyone else who does not have Goucher Navigate access.** This includes not sharing information gleaned from notes or appointment summary reports with parents, family members, faculty, or other students. This expectation is to comply with FERPA and prevent sharing privileged information with others who do not have the right or permission to view a student's educational record.

- You can keep notes in a separate, personal file if there is something you need to remember, but do not want to include it in the student's Goucher Navigate record. Keep this type of personal record for only as long as relevant.