

Goucher Navigate Communication Information & Guidelines – August 2021

Guidelines for Creating Notes, Appointment Summary Reports, & Texting in Goucher Navigate

Goucher Navigate provides a more seamless way for advising and campus offices to organize and share electronic communications regarding undergraduate students. Once fully implemented across the Goucher campus, we expect to have all student-facing offices/units and all faculty using the system. Given the broad-based implementation of Goucher Navigate, it's 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. Documentation provides continuity and consistency in advising, helps you to hold students accountable for actions agreed upon in appointments, increases communication between departments, records valuable data on student use of support services and associated outcomes, and ultimately improves advising relationships with students. In Goucher Navigate, there are two places to leave documentation about a student: the notes feature and appointment summary reports.

Appointment Summary Reports Feature

An appointment summary report in Goucher Navigate is a brief 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 persons holding the "Academic Leadership" role at Goucher. 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. Use discretion when choosing this option since checking this box will make the note visible to the student when they log into their Goucher Navigate account. Notes are editable by the creator of the report, 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 can will receive automated text message reminders of their appointment. Because of the need to be judicious in the number of text messages sent to students, the only personnel who will have the ability to do so will be those designated as

Academic Leaders within Goucher Navigate. Note that students can opt-out of text messages via a link on the message itself.

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. ^[L]_[SEP]

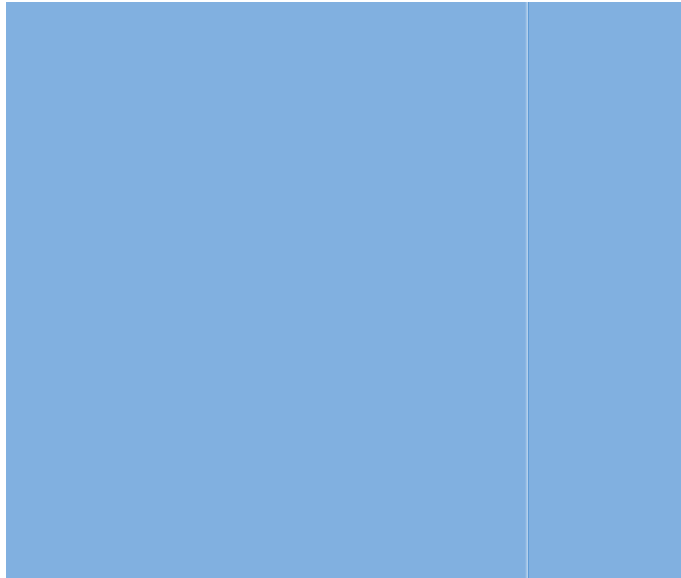
Academic Leadership role at Goucher

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, Vice President for Technology and Planning, and General Counsel; as well, each Assistant/Associate Provost in the academic division, each Associate Dean in student affairs, and the Associate Director for Student Support and Outreach. Because this role also includes access to reports in Navigate, five members of Goucher's EAB Analytics team have also been given this role.

Goucher Navigate Guidelines

- ➤ When including a note or appointment summary report in Goucher Navigate, keep in mind that anyone who has access to Goucher Navigate can view that note or advisor report. There are no private places for advisors to keep information on Goucher Navigate. It's best to assume that all of Goucher Navigate is visible to any faculty, advisor, or staff member who has been granted access. ^[L]_[SEP]
- ➤ Notes and advising 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. ^[L]_[SEP]
- ➤ 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 such as family, financial, academic, personal, or health, without going into detail. ^[L]_[SEP]
- ➤ Keep appointment records brief and relevant, and use only the most commonly understood abbreviations. Use a professional, non-judgmental tone when writing notes. Record facts and observations, and NOT 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." Describe, don't evaluate.^{[[SEP]]}



- ➤ Record information that the student communicates to you in their words. For example, "Student reports that she will be withdrawing for health reasons."^{[[SEP]]}
- ➤ 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."^{[[SEP]]}
- ➤ Advisors are expected to 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 Center, Career Education Office (CEO), etc., as well as academic departments, but not include sensitive information related to the referral.^{[[SEP]]}
- ➤ 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 that were suggested by a previous advisor, depending upon the sensitivity of the subject.^{[[SEP]]}
- ➤ 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.
- ➤ Goucher faculty or staff members who have access to Goucher Navigate and are teaching that semester must give careful thought before considering looking at Goucher Navigate notes or the academic record of students in their class(es). We want to avoid any conflict of interest, particularly in the case where seeing a student's grade history or

Goucher Navigate advising record could positively or negatively impact an instructor's perception of a student. [1]
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- ➤ **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 as well as with faculty members, staff, or administrators who do not have access to Goucher Navigate. This expectation is to comply with FERPA and prevent sharing private 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.