

# **Stony Brook University**

## **Division of Undergraduate Education**

### **Navigate Communication Information & Guidelines**

*Guidelines for Creating Notes, Advisor Reports, & Texting in Navigate*

#### **Navigate Users**

The Student Success Collaborative (called “Navigate”) provides a more seamless way for advising and student service areas to organize and share electronic communications regarding Stony Brook undergraduates. Navigate is an important step forward in creating a coordinated care network for our entire undergraduate population. Once fully implemented across the Stony Brook campus, we expect to have approximately 75 departments/units and close to 300 faculty, staff, and advisors using the system. Given the broad-based implementation of Navigate, it’s important that each user read and agree to the information and guidelines noted below.

#### **Benefits of Notes & Advisor Reports**

Advisors are encouraged to document advising interactions with their students. Documentation provides continuity and consistency in advising, increases communication between departments, and improves advising relationships with students. In Navigate, there are two places to leave documentation about a student, the notes feature and advisor reports.

#### **Notes Feature**

The notes feature is designed to leave notes about a student that do not represent direct communication with the student. Notes are designed to leave background information that would be helpful to another advisor. Common examples of notes include informing everyone that you are the student’s assigned advisor, or that you performed a degree progress check on the student’s record. The notes feature has an option to make a note visible to the student. Use discretion when choosing this option since checking this box will make the note visible to the student when they log into their Navigate account. Please use caution when creating notes since they cannot be edited or deleted.

#### **Advisor Reports Feature**

An advisor report in Navigate is a detailed summary of your advising visit with a student. There are four different contexts to choose from: in person, phone, email, and skype. Users can add multiple reasons to a report, such as degree progress review, academic standing, scheduling, etc. To ensure clear and concise reports, use only one option unless the nature of your advising session calls for multiple reasons. Unlike notes, advisor reports are not visible to the student. Advisor reports are editable by the creator of the report, but cannot be deleted.

#### **Texting Feature**

Navigate can send SMS (text) messages to students. Students who sign up for appointments via Navigate can elect to receive an email reminder the morning of the appointment and an automated text message one hour before their appointment. Advisors can also click “send a message” to remind a student of an upcoming appointment; however, the “send text” feature will ONLY send a message to a student via e-mail. We have disabled the ability to have individual advisors send text messages to students, as we need to be judicious in how many messages we send. Note that students can opt-out of text messages via a link on the message itself.

#### **FERPA Regulations**

Advisor notes and reports in Navigate are to be kept in accordance with existing FERPA laws. For details, visit <http://www.stonybrook.edu/commcms/registrar/policies/ferpa.php>

## Navigate Guidelines

- When including a note or advisor report in Navigate, keep in mind that anyone who has access to Navigate can view that note or advisor report. There are no private places for advisors to keep information on Navigate. It's best to assume that all of Navigate is visible to any faculty, advisor, or staff member who has been granted access.
- 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.
- You can inform students that academically pertinent notes are being recorded and stored in a student database, and viewable by Undergraduate Program Directors, academic advisors, and student services areas.
- Students may request access to these notes, and that they can be subpoenaed by third parties under FERPA guidelines.
- Sensitive information should only be included when academically relevant and handled with discretion, given that all advisors with SCC Campus access may view the student's advising history. It is best to note sensitive information under general headings of **family, financial, academic, personal, or health**.
- Keep advising records brief and relevant, and use only the most commonly understood abbreviations (e.g., DEC, SBC, AOI, PROB, etc.). 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."
- 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 University and department policies and deadlines. For example, "Student inquired about withdrawing from a class. Explained procedure and informed student of the upcoming deadline."
- Advisors are expected to document referrals to other departments, including campus offices such as Counseling & Psychological Services (CAPS), Center for Prevention & Outreach (CPO), Career Center, Academic Success & Tutoring Center (ASTC), Disability Support Services (DSS), and academic departments, but not include sensitive information related to the referral.
- 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.
- Since faculty members who serve as departmental advisors will have access to Navigate – and may serve as a student's instructor, when writing an advisor report about certain academic issues, include only general information. **For example, if a student discusses a specific course withdrawal, selecting the GPNC option, or expresses a concern about an advisor or faculty member, do not include the specific course or advisor/faculty member in the report.**
- Stony Brook faculty or staff members who have access to Navigate and are teaching that semester must give careful thought before considering looking at 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 Navigate advising record could positively or negatively impact an instructor's perception of a student.
- **Individuals who have access to Navigate must never share information learned from Navigate with anyone else who does not have Navigate access.** This includes not sharing information with parents/family members as well as faculty members, staff, or administrators who do not have access to 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 Navigate record. Keep this type of personal record for only as long as relevant.

My signature below indicates that I have read and will adhere to the guidelines noted above.

Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_