

Texas A&M University
Office for Student Success
Navigate Communication Information and Guidelines
Guidelines for Creating Advisor Reports, Notes and Communicating in Navigate

Navigate for Advisors and Staff

Navigate Campus is a web-based platform from EAB that allows advisors and staff access to predictive analytics and tools to support student experience and lead to higher graduation rates, better retention and greater student success. Navigate provides a way for advisors and staff to organize and share electronic communications across campus. Navigate is an important step forward in creating a coordinated network to support the success of our undergraduate population. Given the broad-based implementation of Navigate, its importance that each user read and agree to the information and guidelines noted below.

Benefits of Advisor Reporting – Appointment Summary Reports & Notes

Advisors are encouraged to document all 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 primary documentation methods available in Navigate - Appointment Summary Reports and Notes. The type of student interaction will dictate the appropriate method for documentation.

Appointment Summary Reports

If you are documenting a student appointment (either scheduled, drop-in, no show, or campaign), you should use **Appointment Summary Reports**. An appointment summary report provides a detailed summary of your advising visit with a student (in person, phone, email, group and online). File an Appointment Summary Report after each student appointment (either scheduled, drop-in, no show, or campaign) that provides details of the advising appointment. The report creator cannot delete but can edit the report, and reports are not visible to the student. However, all advising summary reports and notes become a part of the student's academic record once filed.

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 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.

FERPA Regulations

Advisors reports and notes in Navigate are to be kept in accordance with existing FERPA laws. For details, visit: <https://registrar.tamu.edu/Catalogs,-Policies-Procedures/FERPA/FERPA-Notice-to-Students>

Important Note: Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).

Navigate Guidelines

- When including a note or advisor report in Navigate, keep in mind that any user with advisor role access who has access to Navigate can view that note or advisor report.
- Appointment summary reports should summarize a meeting, phone call, or other student communication and provide adequate information to serve as a resource for future advising.
- You can inform students that academically pertinent notes are being record and stored in a student database, and viewable by academic advisors and student service areas.
 - Students may request access to these report and notes and 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 Navigate may view the student's advising history. It is best to note sensitive information under general headings. For example,
 - Family
 - Financial
 - Academic
 - Personal
 - Health
- Use professional, non-judgmental tone when writing notes. Record facts and observations, 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."
- Keep advising records brief and relevant. Use only the most commonly understood abbreviations. For example,
 - SBS- Student Business Services
 - SABR- Study Abroad
 - SFAID- Scholarships and Financial Aid
 - ASC- Academic Success Center
 - TAP- Transition Academic Programs
 - SI- Supplemental Instruction
- Advisors are expected to document referrals to other departments but not include sensitive information related to the referral. Use your best judgment should you speak with that 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. This expectation is to comply with FERPA.

For additional information contact the Office for Student Success, 979-458-0997 or navigate@tamu.edu.