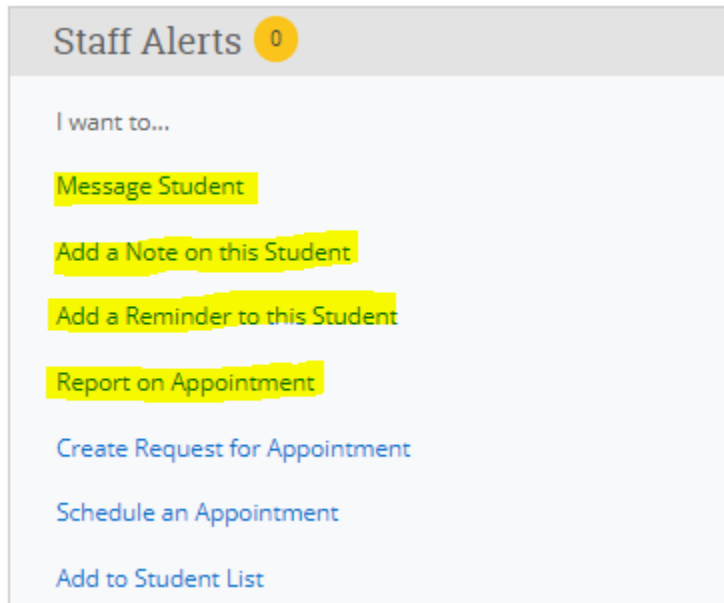


Ways to Record Student Interactions in Navigate

There are many ways to document interactions with individual students in Navigate. They are listed on the right-hand side of the student page. Remember that all documentation is included in the student's record.



Message Student

- You can send an email to a student (including attachments)
- You can CC others
- Messages you send are recorded under the "More" tab under "Conversations"
- If a student responds, his/her response is also recorded there
- Your messages will also appear in your Outlook inbox and outbox. Note: They only appear in both places if the initial email was sent through Navigate.

Add a Note

- You can add notes to a student's record (including attachments)
- The system defaults to everyone (other than the student) being able to see the note; this is often a best practice
- These notes will be saved in the student's History
- You can select only your name under "Visibility" if you want the note to be visible to you only. You should choose this option when your note references the Counseling Center or Disability Resource Center.
- You can choose the student's name under "Visibility" if you want the note to appear in the Student View.

Add a Reminder

- You can add a reminder to yourself regarding a specific student. For example, you can remind yourself to check on their mid-term grade in a specific class. Or you can remind yourself to wish them luck on an upcoming test.
- Reminders are listed on the Reminder page and on the right-hand side of the Home page

Report on Appointment

- If a student stops in for an appointment (without scheduling one through Navigate in advance) you can record your interaction through the official report form.
- Once you choose a Care Unite (i.e.: Advising, Office Hours), some of the report will populate for you and you will be prompted to answer a few questions.
- If you choose to fill out the report after the appointment is over, remember to change the meeting start and end time.
- This report will be saved in the student's History and can be viewed by anyone who has access to the platform.

APPOINTMENT REPORT FOR MAXWELL DECHTER

You must first choose a Care Unit before adding any additional data in this form.

Appointment Details ⓘ

Care Unit

Select Care Unit

Location

Select Location

Service

Select Service

Course

Start typing to search all courses

Meeting Type

Select Meeting Type

Date of visit

Meeting Start Time

12:23pm

to

Meeting End Time

Attendees

Melissa Boog
Administration, Advisor

☒ Attended

Maxwell Dechter - 3044204
Sophomore
Marketing (pre)

☒ Attended

Checkin

to

Checkout

Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.

Date

Time

Appointment Summary

B *I* Paragraph

An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

Save this Report