

Gillings Navigate Notetaking & Documentation Guidelines for Staff/Faculty

General Content & Practice Guidelines

Notes are unbiased reports of a student's experience and interactions with the University/Gillings. Prior to entering a note into Navigate, assess how the note will contribute to the holistic record of a student's academic, personal, and career pathway and what will maintain an appropriate level of disclosure.

The following section presents items for consideration and potential inclusion in notes. Not every item will apply to all circumstances or conversations; these are intended to be guidelines for determining what is necessary or appropriate for each interaction. When in doubt regarding appropriate note-taking, consult with Gillings Student Affairs.

General Guidelines:

- Fact-based, descriptive notes help convey the unique dynamics of a student contact, or
- Narrative notes are encouraged for readability and nuanced circumstances, or
- Bulleted summaries are effective and can be readily skimmed in preparation for an appointment

When to Document

Navigate notes are most useful when entered during, immediately after, or within 24 hours of an appointment or interaction and are immediately viewable within the system. Timely recording helps document important details accurately and maximizes the ability of campus partners to act with purpose, clarity, and timeliness in meeting the needs of a student.

What to Document

General Guidelines

Enter notes with the understanding that content may be viewed by others who have an educational need to know, in accordance with FERPA.

1. Relevant contact with a student or relating to a student, including appropriate details and dates of interaction.
 - Examples of interactions: telephone conversations, emails, drop-in appointments, pre-arranged meetings, and no shows.
 - Document communications outside of appointments that are relevant to the student's academic record (e.g. a phone call about how to withdraw from a course; a question regarding policy/forms).
2. Notes should aim to communicate:
 1. When and why the student sought help.
 2. Steps taken to address the students' concerns.
 3. Relevant information the student shared during the interaction.
 4. Advice and recommendations shared.
 5. Follow-up actions the student or staff member will take, or referrals to support areas.
 6. An overall summary of what was discussed as it relates to the student's plan/success.
3. Include any discussion in which a student chooses either to adopt or reject a recommendation you have made. Note the student's stated opinions or decisions pertaining to recommendations made during a current or prior appointment (adoption or rejection). Also include any possible consequences shared with the student.
4. Document contacts from other student support staff or parties if they have a bearing on career or degree progress. Phone conversations, notes, or e-mails to and from third parties may be included. This could include correspondence from parents, faculty or colleagues, such as referrals and questions.
5. If handouts are provided to the student, consider stating the purpose and name of handout.
6. Always be sure to check your notes for accuracy before saving them.
7. Summary Reports (appointment based) may be saved and edited at a later time. Navigate's "Notes on Student" may not be edited by the author once saved. A change request will be required and approved by Gillings Student Affairs.

How to Document

Only include facts and observations for effective documentation. Refrain from opinions, speculations, diagnostic language, and personal emotions. It is acceptable to note what the student reports.

1. Notes based in fact will include observable pieces of information for documentation.
 - Notes changes in behavior through observation of student actions, dress, speech, emails, etc.
 - Describe behaviors that indicate what a student may be feeling – “Student was unable to stay seated during advising meeting” or “Student did not maintain eye contact.”
 - Describe student behaviors and their impact on the student support staff member – “The student spoke in an angry tone.”
 - Describe symptoms rather than diagnose or evaluate, ex. “Student displayed slurred speech, loss of coordination and an inability to follow our conversation,” to describe someone you may think is intoxicated.
 - Record relevant statements made by the student, for example, “Student stated ...”
2. Subjective information in notes may be interpreted differently by different people. Including opinions, speculations and emotions in notes can result in unintended consequences and/or harm to a student.
 - It is inappropriate to speculate regarding a student’s motivations, concerns or abilities, or label a student’s personality based on behavior (ex. “She was a bully and rude in the meeting”).
 - It is inappropriate to make statements that diagnose student health or well-being (ex. “Student was drunk” or “Student seemed anxious/depressed”).
3. It is appropriate to provide information that will enable a campus colleague to contextualize the student’s circumstance and the related advice offered.
 - If pertinent to understanding the context of an interaction, students may be directly quoted.
 - Document discussions of University policies and academic regulations.
 - Avoid jargon and uncommon abbreviations or acronyms.
4. If you speculate about an outcome/impact of an action or decision, be clear with the student (and in your note) to acknowledge the hypothetical nature of your conversation. Make no overt promises if you cannot guarantee the result.

Sensitive Subject Matter

Caution should be exercised when using Navigate to document topics that contain sensitive or time-sensitive subject matter. Do not use Navigate to document emergency situations. If you believe that this is an emergency situation, including an imminent threat of harm to self or others, please call the UNC Police Department at 919-962-8100 or call 911. If the concern involves discrimination and harassment, including sexual and gender-based harassment, sexual violence, interpersonal violence, or stalking, please submit an [EOC Report Form](#). Please also review the University Dean of Students Office [Care Referral](#) information.

If you believe it is important document sensitive subject matter, use general or coded language. Below are a few examples of ways to communicate this information:

- Student reported extenuating circumstances related to his academic progress this term
- Student discussed a difficult situation and requested help from a campus support service
- Student disclosed a personal situation that is having an impact on how things are going this semester

If you would like to speak with a Gillings Student Affairs staff member during traditional business hours to discuss your concern, please call 919-966-2499.

If you would like to speak with a University Dean of Student staff member during traditional business hours to discuss your concern, please call 919-966-4042.