

EAB NAVIGATE360 – NOTETAKING BEST PRACTICES

Notetaking in Navigate360 is a practice in which staff members log information relating to a student interaction. Interactions include scheduled appointments, drop-in visits, gained insight about a student outside of an appointment, and ongoing email & text outreach. The guidelines below are recommendations to enhance your notetaking practice to confidentiality and collaboration.

NOTETAKING DOS AND DON'TS

TOPIC	DO	DON'T
What should I focus on?	Disclosed details that bring valuable insight on the student's success & progress toward graduation	Avoid: personal details that do not pertain to their UWM experience
What's appropriate to include?	Professional notes, based on observation Direct statements from the student when necessary	Avoid: any subjective opinions or interpretations about the student
How much should I write?	Brief recap of the student interaction Concise notes that are clear and easy to understand Bulleted points to list the topics & action items discussed	Avoid: the same copied & pasted words or generic sentences that do not offer valuable insight Avoid: extensive details about the interaction in full sentences
What should I include about referrals?	Specific recommendations or referrals to campus resources Follow-ups from previous referrals	Avoid: full details about sensitive topics <ul style="list-style-type: none"> • Disability information • Mental health status • Housing insecurity • Domestic violence/SA Don't forget to highlight the next steps that you took to support the student
Other	Be timely with logging appointment summaries and no-shows Utilize Notes that are only visible to you to capture additional details about your students	Skip notetaking if you communicated with the student directly through the platform or sent it to their Navigate360 email (ePanther@campus.uwm.edu) This information is captured in the Conversations tab

MODES OF NOTETAKING IN NAVIGATE360

1. Appointment Summaries – preferred way to document a student interaction that was tied to an appointment, whether it was scheduled or a drop-in visit. Appointment Summaries are not available to students; they are only viewable by other staff users through the History tab on a student's profile.
2. Notes – preferred way to document a student interaction that is *not* tied to a specific appointment or visit. Notes can be toggled to be private for the staff member or shareable with students on an ad hoc basis. Notes are also viewable by other staff members through the History tab on a student's profile.
3. Messaging – personalized email and text outreaches are captured in the platform when sent directly from the platform or by emailing a student's Navigate360 email address (e.g., ePanther@**campus**.uwm.edu). Messages are viewable by other staff members through the Conversations tab on a student's profile.
4. Alerts/Cases – additional comments can be captured in the platform when added to referral alerts or cases. Alerts and cases are viewable by other staff members through the History tab on a student's profile.

DIFFERENTIATED NOTETAKING PRACTICES – BASED ON STUDENT NEED

Your notetaking practice can vary for every student you serve. You may need to adjust how much you capture about student interactions based on the individual's needs, experiences, or barriers at UWM. These student populations with higher need might include:

- Undeclared first-year students
- New transfer students
- Re-entry students
- "Murky middle GPA" students who are at risk for academic probation

NOTETAKING FRAMEWORKS TO CONSIDER

- GROW Model – an acronym for the following four steps: Goal, Reality, Options (or Obstacles), and Way Forward (or Will). This framework can help coaches and mentors with formulating questions and goals when meeting with students.
 - Check out the GROW Model worksheet below from InsideOut Coaching

- Collaborative Note Writing – a note writing practice that involves the student in the documentation process to provide transparency on what's being logged in Navigate360 and encouraging them to be more engaged during the appointment.
 - Check out the NACADA article below by Bret Hirsch from the University of Louisville
 - Here are phrases to use with students when writing notes together:
 - "Okay, let's sum up what we've discussed today."
 - "Let's stop here and review what we've talked about"
 - "What stood out to you about our conversation today?"
 - "What is your biggest takeaway from today's meeting?"
 - "What do you feel is most important for me to write about today's meeting?"

RELATED RESOURCES

Notetaking Frameworks

- [NACADA article by Bret Hirsch](#)
- [GROW Model worksheet from InsideOut Coaching](#)
- [The GROW Model of Coaching and Mentoring from MindTools](#)

UWM Campus Policies

- [FERPA Policy from the UWM Registrar's Office](#)
- [UWM Policy for Confidentiality and Disclosure from the Accessibility Resource Center](#)