Notes for Advisors

Notes offer an additional mechanism to jot down information about a student, collaborate across campus, and create a record of information provided directly to the student. Notes are not tied to student appointments. Notes are visible to and accessible to any staff or faculty in the platform who have permission to view Notes. Because of their flexibility, CCNY users can take advantage of notes in a variety of ways.

- Users can utilize a note as a *sticky note*, and permit faculty and staff to document any important information that should be visible to anyone working with the student.
- Other users may use notes to track very specific information about students, such as their degree plans. In these scenarios, faculty and staff can attach the student's degree plan directly to the note, make the note visible to the student, and label the note with a searchable Note Reason, such as *Academic Planning.*

How Do I Create a Note?

"Note" is an option in the **Actions** menu throughout the platform. On the Staff Home in the **Assigned Students** section, find a specific student or students. Select the student and pick **Note** from the **Actions** menu.

The easiest way to create a Note is from a Student Profile. Navigate to that specific student's profile and click "Add a Note on this Student" from the Actions menu on the right.

What Information Is Included?

Notes should only contain general information related to that student, possibly documentation. Within a Note, you can include the following information:

- Note (free text)
- Attachments
- Note Reason
- Note URL
  - This is a place to copy and paste a URL. For example, if you spoke with the student about a particular research resource, you can copy and paste in a URL to that resource to share with the student.
- Visibility (private and/or visible to the student)
  - If you choose to make a note visible to the student, they will be able to view it in the "My Docs" section of the Navigate Student app.

CCNY Navigate Note Reasons

Below are the Note Reasons currently available to all CCNY Navigate users:

- General Note to File
- Record of Non-Appointment Conversations with Student
- Sharing Documents with the Student
- SoE Concentration Sheet (School of Education Only)
- SoE Program Plan (School of Education Only)

How to View Notes on a Student Profile

On the student profile, Notes can be found on the **History** tab along with other documentation, such as Appointment Summaries or Progress Reports. To view only Notes, you have two options:

1. Select **Note Added** in the History filter, as shown below.

2. Click on **(Student Name)'s History** and filter to view only Notes.