

Note-Taking in [Navigate CSI](#)

Adding a note on a specific student in Navigate CSI is another way to create a record of information provided directly to the student, including links, student-facing attachments, or other helpful information.

It serves as an "Electronic Post-It," which can be filed at any time about the student, and includes contact attempts or other need-to-know items for other advisors.

Notes can also be visible to the student – advisors can choose to share the note with the student by making it visible.

[FERPA](#) entitles students to access any information considered part of their education record. Any Advising Notes created in the Navigate CSI platform are considered part of a student's education record and are accessible by students, by open records requests and by court subpoenas. This applies to Notes whether they are designated as shared with students in the platform or not. [FERPA](#) guidance and training are available through the [Office of the Registrar](#).

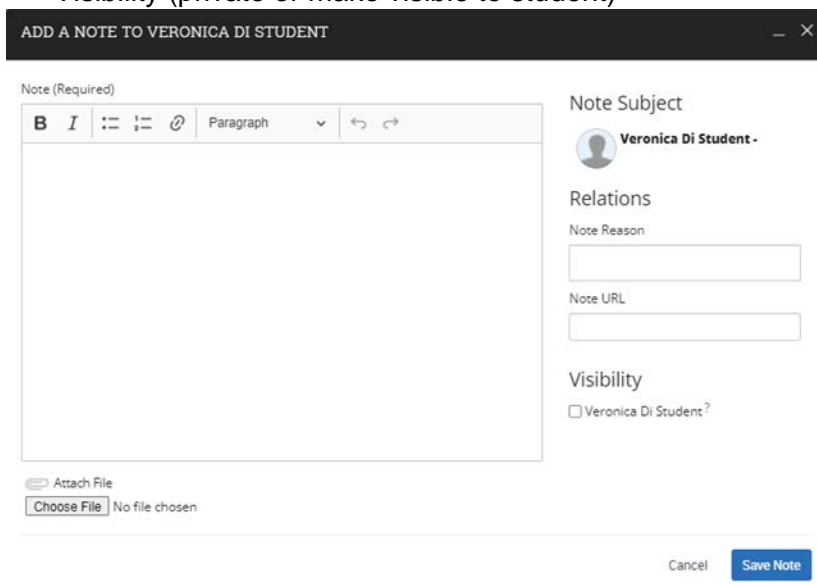
What Information should be included in a Note?

Notes should only contain general information related to that student, such as their degree maps or course registration information.

No information specific to an appointment should be included in a Note. That information should be entered into an Appointment Summary Report.

Within a Note, you can include the following information:

- Note (free text)
- Attachments
- Note Reason
- Note URL
- Visibility (private or make visible to student)



The screenshot shows a web form titled "ADD A NOTE TO VERONICA DI STUDENT". The form is divided into two main sections. On the left, there is a large text area for the note content, with a rich text editor toolbar above it containing options for bold (B), italic (I), bulleted list, numbered list, link, and paragraph style. Below the text area is an "Attach File" button and a "Choose File" button with the text "No file chosen". On the right side of the form, there are several fields: "Note Subject" with a dropdown menu showing "Veronica Di Student -", "Relations" with a "Note Reason" text box, a "Note URL" text box, and a "Visibility" section with a checkbox labeled "Veronica Di Student?". At the bottom right of the form are "Cancel" and "Save Note" buttons.

How Do I Create A Note?

The easiest way to create a **Note** is from your **Staff** homepage.

On your **Staff homepage**, under the “**Assigned Students**” tab, find the specific student in your Assigned Students list. Click on a student and select “**Note**” from the Actions drop down menu.

Staff Home

Students | Appointments | My Availability | Appointment Queues

Assigned Students

List Type: Assigned Students | Term: 2022 Fall (Default Ter... | Relationship Type: All Relationship Types

Actions ^

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Appointment Campaign
- Schedule Appointment
- Note
- Issue Alert
- Add to Student List
- Add To-Do
- Show/Hide Columns
- Export Results

STUDENT LIST	CUMULATIVE GPA	CATEGORY
	3.084	CUNY SC Transfer Student,Entry Cohort - 2021 Fall Term,Gr Student,Undergraduate Student
	2.987	Enrl in Class - Winter 2020,Entry Cohort - 2020 Spring Term Eligible to Apply(UG),Milestone - Math,Milestone - Reading, Student,Undergraduate Student
	2.598	Computer Device,CUNY CC Transfer Student,Entry Cohort - Standing,Graduation Status - Program in Review(UG),Offici
	3.200	Enrl in Class - Winter 2021,Entry Cohort - 2020 Spring Term Eligible to Apply(UG),Minor - Economics,Official ASAP Stude
	3.233	Entry Cohort - 2020 Spring Term,Good Academic Standing, Apply(UG),Milestone - Math,Milestone - Reading,Milestone Student
		Entry Cohort - 2020 Spring Term,Good Academic Standing,

You can also create a “**Note**” from a **Student Profile page**.

Navigate to that specific student’s profile and click “Add a Note on this Student” from the Actions menu on the right.

- *Notes are not restricted by Care Unit. Anyone with permission to view Notes and to view the specific student information will be able to view your notes.*

Current Alerts 0

I want to...

- [Message Student](#)
- [Add a Note on this Student](#)
- [Add a To-Do to this Student](#)
- [Report on Appointment](#)
- [Schedule an Appointment](#)
- [Add to Student List](#)
- [Issue an Alert](#)

Where can I access the Note(s) in the future?

- All Notes you filed can be found in the individual student’s profile page from the Reports/Notes tab.

Veronica Di Student

Overview	Reports / Notes	Courses	Path	More ▼
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Are notes part of a student’s official record and subject to restrictions under the Family Educational Rights and Privacy Act (FERPA) and local privacy laws?

Yes! [FERPA](#) entitles students to access any information considered part of their education record. Any Advising Notes created in the Navigate CSI platform are considered part of a student’s education record and are accessible by students, by open records requests and by court subpoenas. This applies to Notes whether they are designated as shared with students in the platform or not. [FERPA](#) guidance and training are available through the [Office of the Registrar](#).

Questions & Answers

Q: How can I view Notes about a student?

A: Notes can be found in the individual student's profile page from the Reports/Notes tab.

Q: Who can view the communications I have sent?

A: Any faculty or staff member will only be able to view communications for which they have the proper permissions. Permissions allow users to either view only their own communications with students, or to view all communications with students. If you are unsure who can view your communications, contact navigate@csi.cuny.edu.

Q: What can you use the text and email messaging for?

A: You can use this feature to send out general announcements or nudge your students to check their campus email for important information.

Q: Is there a way to remove/delete messages that are stored in the Conversations tab?

A: No. Messages cannot be removed or deleted from the Conversations tab.

Q: Are SMS/Text and email messages that are sent through Navigate CSI part of a student's official record and subject to restrictions under the Family Educational Rights and Privacy Act (FERPA) and local privacy laws?

A: Yes! [FERPA](#) entitles students to access any information considered part of their education record. Any Advising Notes created in the Navigate CSI platform are considered part of a student's education record and are accessible by students, by open records requests and by court subpoenas. This applies to Notes whether they are designated as shared with students in the platform or not. [FERPA](#) guidance and training are available through the [Office of the Registrar](#).