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)

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.

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.

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.
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.