

# BLAZER NAVIGATE

## Quick Guide: Recording Appointment Summaries and Notes

Blazer Navigate facilitates a campus-wide coordinated student support network by allowing advisors and other professionals to share *Advising Appointment Summaries* and *Notes* that document interactions and other relevant information. The benefits of a single, accessible repository for *Appointment Summaries* and *Notes* include improved communication, coordination, efficiency, transparency, and a more personalized student experience in advising.

### Appointment Summaries vs. Notes: Who Sees What?

#### Appointment Summaries

- Used to document details from a specific advising encounter—date/time, attendance, discussion points, referrals, follow-up steps, etc.
- Typically, **not visible to students**. Many guidelines even recommend keeping them internal for communication among staff.

#### Notes

- Capture broader context or additional updates related to the student—like financial aid updates, or purposes outside a formal visit.
- Can optionally be made visible to students if marked accordingly.

#### Recommendation

- Any interaction with a student that requires documentation, capture it by entering notes as an appointment summary, even when there was no appointment.

#### FAQ

##### *Why should you create an Appointment Summary when meeting with a student?*

- Reminder of the advice given during meetings with students (in person, by email or phone).
- Help advisors and other support staff communicate and provide consistent, informed services.
- Create an “institutional memory” of contacts and recommended actions.
- Record valuable data on student use of support services and associated outcomes.
- Prevents the student from having to share the same story multiple times.

##### *The content of an Appointment Summary aims to communicate:*

- For what was the student seeking help?
- What steps were taken to address the student’s concerns?
- What advice and recommendations were made?
- What are agreed upon follow-up actions? Were specific referrals made?
- Overall, summarize what you discussed as it relates to the student’s success.





##### *Why should you create a Note?*

- Record essential information that you learned outside of an advising appointment (e.g., changes in registration, financial aid, etc.)
- Record the outcomes of your efforts to resolve issues for the student.
- Communicate important notices for other advisors, staff, and faculty.
- This option allows you to share your notes with the student.

The Family Educational Rights and Privacy Act (FERPA) entitles students to access any summaries or notes considered part of their academic record. Any *Appointment Summary* or *Note* created in the Blazer Navigate are



considered part of a student's academic record and are accessible by students, open records requests, and court subpoenas. This applies to *Notes* whether they are designated as shared with students in the platform or not.

**With FERPA in mind when documenting:**

- ✓ Assume students, parents, or the general public could read anything and everything you have written.
- ✓ When writing your appointment summaries and notes, ask yourself the following questions:
  1. Is this something the student would want other people to know?
  2. Is this something another advisor would need to know? Why?
  3. Is this something that is within my scope of practice to say? Do I have the necessary training, and is this something germane to my area of professional expertise?
  4. Are the details in my notes based on fact or do they merely represent my own observations, perspectives, guesses, predictions, diagnoses, etc.?
- ✓ Appointment Summaries and notes should be academic-related and avoid including personal, potentially sensitive content.
- ✓ Do not include sensitive medical, mental health, or disability information.
  - For example:
    -  Too detailed: "Student disclosed they have bipolar disorder and stopped taking medication, which caused suicidal thoughts."
    -  Better: "Student expressed experiencing significant mental distress. Walked the student to Counseling Center for immediate support."
  - Similarly, avoid writing:
    1.  "Student disclosed ADHD diagnosis and struggles with medication."
    -  Better: "Student shared they are having difficulty focusing and keeping up with assignments. Referred student to Academic Success Center and Office of Accessibility Services for strategies and possible accommodations."

If you are ever unsure about what to include, err on the side of being concise and factual, and consult with your department chair/supervisor for guidance.

## Recording Appointment Summaries and Notes in Blazer Navigate

 <b>Do</b>	 <b>Do not</b>
<p><b>Briefly summarize what was discussed as it relates to student success</b> for future reference by the student, other support staff, and future advisors. Notes should highlight recommendations, referrals, and follow-up plans.</p> <ul style="list-style-type: none"> <li>• <i>Recommendation</i>: Recommended student take MAT 151 to strengthen math foundation.</li> <li>• <i>Advice</i>: Cautioned against taking eighteen credits this semester due to work schedule.</li> <li>• <i>Referral</i>: Referred to Student Financial Services.</li> <li>• <i>Action Plan</i>: Student will follow up with tutoring and schedule an appointment after midterms.</li> </ul>	<p><b>Avoid summarizing everything discussed.</b> Notes are not transcripts. - Unnecessary detail: “She said she has been having a good week and is excited about moving into a new apartment.”</p> <ul style="list-style-type: none"> <li>• Sensitive information: “Student disclosed that she has been diagnosed with depression.”</li> <li>• Subjective opinions.</li> </ul>
<p><b>Summarize specific course recommendations.</b></p> <ul style="list-style-type: none"> <li>• Encouraged student to take HIS 120 as a gen ed.</li> <li>• Recommended BIO 105 for Spring 2026.</li> </ul>	<p><b>Do not report problems with specific instructors.</b></p> <ul style="list-style-type: none"> <li>• “Student doesn’t like his MAT 151 instructor.”</li> <li>• “Student said PHI 120 professor has unfair grading policies.”</li> </ul>
<p><b>Spell things out for a general audience. Write fact-based, academic-related notes.</b></p> <ul style="list-style-type: none"> <li>• Student was concerned about grades in two courses.</li> <li>• Student is reconsidering whether current major is a good fit; helped him explore other options.</li> <li>• Student needs to successfully complete PSY 102 before taking upper-level PSY courses.</li> </ul>	<p><b>Do not use unexplained acronyms, speculation, or judgments.</b></p> <ul style="list-style-type: none"> <li>• “I don’t think she is very motivated this semester.”</li> <li>• “His personality is not a good fit for STEM fields. He would be more at home in something artistic.”</li> <li>• “She has probably been avoiding BIO 211 because she struggled with BIO 101.”</li> </ul>
<p><b>Use general or coded language concerning sensitive material.</b></p> <ul style="list-style-type: none"> <li>• Student reported extenuating circumstances impacting academic progress.</li> <li>• She discussed a difficult situation and requested campus support.</li> <li>• Student disclosed a personal situation affecting coursework.</li> </ul>	<p><b>Do not include private, detailed sensitive information.</b></p> <ul style="list-style-type: none"> <li>• “Student’s parents are going through a divorce.”</li> <li>• “She reported she was assaulted by her boyfriend earlier this year.”</li> <li>• “Student was recently diagnosed with an autoimmune disorder.”</li> </ul>
<p><b>Record referrals made and resources shared.</b></p> <ul style="list-style-type: none"> <li>• Shared information about the Counseling Center.</li> <li>• Discussed resources from Student Health Service.</li> <li>• Referred to Financial Aid Office. - Referred to Office of Student Success.</li> </ul>	<p><b>Do not include details surrounding sensitive referrals.</b></p> <ul style="list-style-type: none"> <li>• “He said he has been diagnosed with depression.”</li> <li>• “He said he receives accommodations.”</li> <li>• “He said he is facing a student conduct issue.”</li> </ul>
<p><b>Include notes about positive student behaviors.</b></p> <ul style="list-style-type: none"> <li>• Student came prepared with course plan filled out.</li> <li>• He has talked with two Sociology professors to explore changing majors.</li> </ul>	<p><b>Do not make negative judgments about student behaviors.</b></p> <ul style="list-style-type: none"> <li>• “She just blows off advising appointments; she won’t plan ahead.”</li> <li>• “He seems uninformed about the real world and unrealistic about his goals.”</li> </ul>

Adapted from: Reports and Notes Guidelines (Rutgers-Newark) and Keuka College Recording Notes guide and Adopting a Campus-Wide Student Notes System.

## Appointment Summaries

**Appointment Summaries** allow you to document information pertaining to a specific student appointment, whether the appointment was scheduled, a walk-in, or the student was a no-show. Access to appointment summaries may be limited to your specific Care Unit or based on your user role permissions.

Following any type of Advising interaction, you will create a report to document the interaction. *Please note: **Appointment Summaries** are not yet visible to students, so information should not be included with the expectation that students will be able to view any notes or recommendations you have. Any Appointment Summary or Note can be requested by a student as part of their records, so do not include any information you would not be comfortable having the student potentially see.*

Reminder: There are two methods of creating an Appointment Summary. The method you choose will depend on whether your appointment was scheduled in advance through Blazer Navigate or if your appointment was not scheduled.

### For appointments scheduled through Blazer Navigate

1. From your **Staff Home** screen, you will click on appointments where you will see upcoming and all **Recent Appointments**.
2. Select the check box for the student for which you will be entering notes & click “**Actions** ▾” above that table, then select **Add Appointment Summary**.

**Upcoming Appointments**

Care Unit: All Care Units

Actions ▾										Show Cancelled
		DATE/TIME	ATTENDEE	SERVICE	COMMENT	MEETING TYPE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS	
<input type="checkbox"/>	1/1	08/27/2025 2:00pm - 2:30pm ET	[REDACTED]	Success Coaching(Academic & Personal Support)		In-Person	Not Yet.	<a href="#">Details</a>	N/A	

**Reporting**

**Recent Appointments** | Recent Reports You Created

Care Unit: All Care Units

Actions ▴										Show Cancelled
			SERVICE	COURSE	COMMENT	ATTENDEE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS	
<div>Add Appointment Summary</div> <div>Mark No-Show</div> <div>Issue Referral</div>			Success Coaching(Academic & Personal Support)	N/A		[REDACTED]	Not Yet.	<a href="#">Details</a>	N/A	

3. Select your Care Unit if it is not already populating.
4. Select your location if it is not already populating.
5. Select services if not already populated. These are the topics that the student wanted to talk about. You can select more than one.
6. Select meeting type.

### Appointment Details

Success Coaching(Academic & Personal Support)  
08/20/2025 2:00pm - 2:30pm ET

**Care Unit**  

Academic Support

**Location**  

Student Success Center

**Service**  

Success Coaching(Academic & Personal Support) X

Select Service

**Course**  

Start typing to search all courses

**Meeting Type**  

In-Person X

Select Meeting Type

**Date of visit**  

08/20/2025

**Meeting Start Time**  

2:00pm


to

**Meeting End Time**  

2:30pm


7. Check attended for you and the student if not selected.
8. Optional: Enter check in and check out time.
9. Optional: Select summary details
10. Enter notes.
11. If you have attachments, you can attach them after the summary note.
12. Click save this report when done.

### Attendees



**Camelia Rubalcada**  
Administration, Staff

☒ Attended



**[REDACTED]**  
Undeclared (MJUND)

☒ Attended

Checkin

Checkout

to

### Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.

Date
Time

### Summary Details For [REDACTED]

Assignments or Topics Discussed

Study Skills Used

Recommendations

Student arrived on time?

☐ Yes
☐ No
☐ N/A

Student was prepared for our session?

☐ Yes
☐ No
☐ N/A

Student is having academic difficulty?

☐ Yes
☐ No
☐ N/A

Student has clear next steps?

☐ Yes
☐ No
☐ N/A

### Appointment Summary

Paragraph

B
I

@

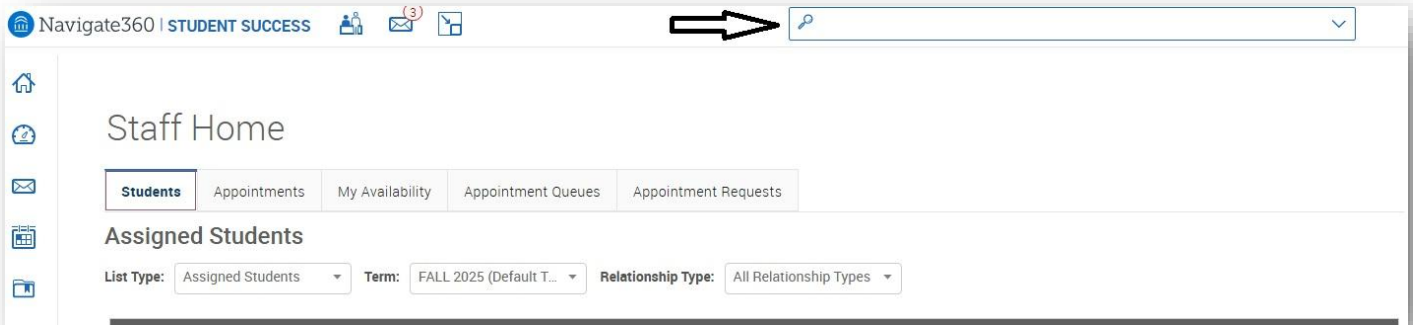
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## For appointments not scheduled but want to enter a note

1. Search for student name.



Navigate360 | STUDENT SUCCESS

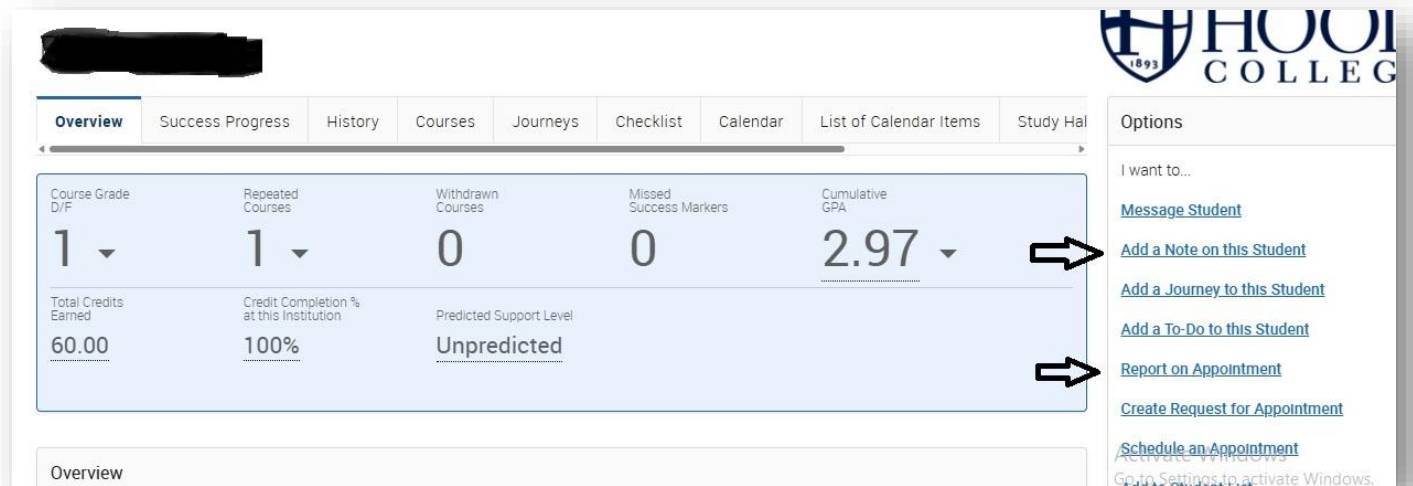
Staff Home

Students Appointments My Availability Appointment Queues Appointment Requests

Assigned Students

List Type: Assigned Students Term: FALL 2025 (Default T... Relationship Type: All Relationship Types

2. Select report on appointment or add a note.



HOOR COLLEGE

Overview Success Progress History Courses Journeys Checklist Calendar List of Calendar Items Study Hall

Course Grade D/F 1 Repeated Courses 1 Withdrawn Courses 0 Missed Success Markers 0 Cumulative GPA 2.97

Total Credits Earned 60.00 Credit Completion % at this Institution 100% Predicted Support Level Unpredicted

Options

I want to...

[Message Student](#)

[Add a Note on this Student](#)

[Add a Journey to this Student](#)

[Add a To-Do to this Student](#)

[Report on Appointment](#)

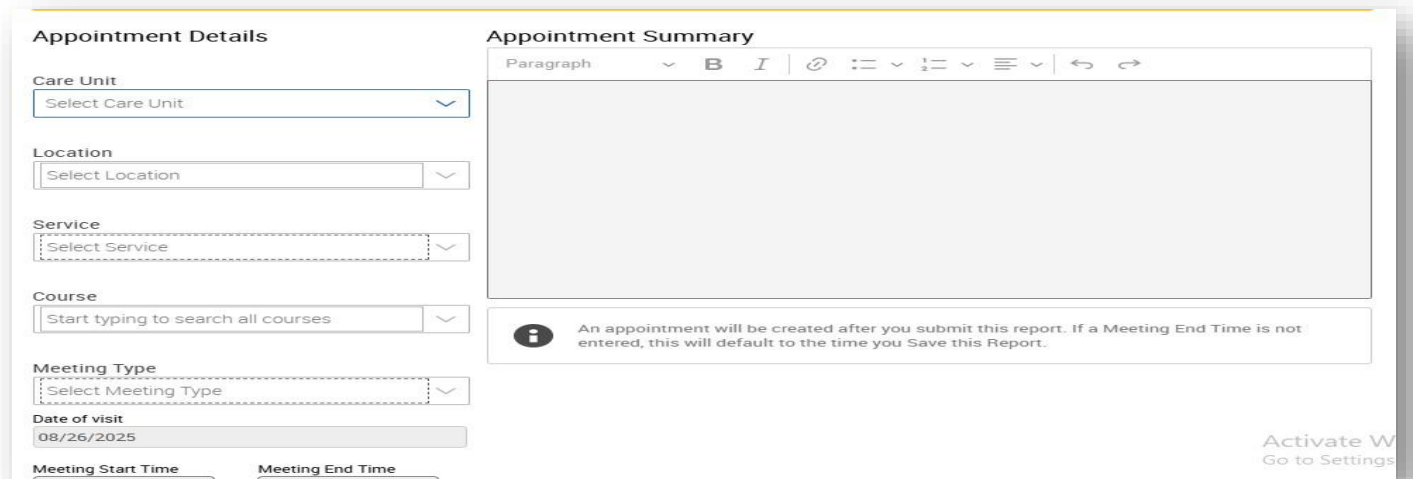
[Create Request for Appointment](#)

[Schedule an Appointment](#)

Go to Settings to activate Windows.

Overview

3. Follow steps 4-12 from above to report on an appointment.



Appointment Details

Care Unit Select Care Unit

Location Select Location

Service Select Service

Course Start typing to search all courses

Meeting Type Select Meeting Type

Date of visit 08/26/2025

Meeting Start Time Meeting End Time

Appointment Summary

Paragraph B I

An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

Activate W Go to Settings



4. If you prefer to enter a note and not an appointment summary, select add a note on the student in the options menu on the right-hand side & select note reasons.
5. Visibility: Only you and the student would see this **Note** if you selected both of your names. ***\*This is not recommended if the note would be helpful to other departments at Hood.*** Leaving both boxes unchecked will make the **Note** visible to anyone who has access to the student's profile *except* the student. ***This is the recommended option unless it is something the student needs to see.***
6. Make sure to click Save Note.

Note (Required)

Paragraph **B** *I*

Attach File  
Choose File No file chosen

Note Subject  
Other Undeclared (MJUND)

Relations  
Note Reason  
Note URL

Visibility  
☐ Camelia Rubalcada Only ?

Cancel Save Note

### No Show Appointments

1. Go to your staff home page and select appointments to see your recent appointments.
2. Select the check box for the student for which you will be entering notes and click “Actions ▾” above that table, then select “Mark No Show.”
3. When in the appointment report, make sure to uncheck the “Attended” box under the student’s name and type “Student did not attend scheduled appointment.” in the Appointment Summary box.

Recent Appointments

Care Unit: All Care Units

Actions ▴

- Add Appointment Summary
- Mark No-Show
- Issue Referral

(30m)

Service Course Comment Attendee Report Filed? Details Pre Appt Questions

Success Coaching(Academic & Personal Support) N/A [Redacted Name] Not Yet. [Details](#) N/A

Show Cancelled



### **Important Definitions:**

- **Care Unit** – Your functional area of department (advising, academic support, athletics, etc.)
- **Location**-The physical or virtual place where you met with the student (advising, Volpe, etc...)
- **Service**-Topics that you assisted the student with during the appointment. Multiple topics can be selected.
- **Course** - If it was regarding a specific class the student is registered for, you can select this. It is not required.
- **Date** - Date appointment was scheduled for/occurred.
- **Meeting Start/End Time** - Update to when you started and ended your appointment.
- **Goals/Next Steps** - Are there any goals or next steps that the student has? Sample options include, but are not limited to:

Apply for graduation

Make an appointment with tutoring Register  
for classes

Submit FAFSA

Submit transcripts

Submit transfer application to Salem State

Take placement test

Take TEAS

- **Notes** can be viewed as information regarding the student but not stemming from an advising interaction. Updates like those below are provided by the Registrar, Student Financial Services, Academic Affairs, etc...
  - Degree Evaluation for Graduation - program and catalog year, scheduled courses
  - Course Waiver- Date course waiver was submitted/approved
  - Change of Program - signed off - approved/denied
  - AS & P results