

When adding notes or comments in The HIVE please keep in mind that your comments may be viewable to others and are always part of the student record in relation to FERPA (please also see [The Hives Privacy Statement](#) for more details). Keep in mind for each Flag, Referral, Note or other record, The HIVE will show you with whom that communication is shared. The rules for whom items are shared with are defined for each type of alert and then further defined by role and relationship.

**Student View:** FERPA standards protect student data. A complete policy statement on the CSB/SJU implementation of FERPA guidelines can be found in the Registrar's Office: <http://www.csbsju.edu/registrar/records-and-privacy>.

**Permissions:** People with the following roles may be able to see this appointment if they have a relationship with the student(s):

- Secondary Faculty Advisor
- Academic Advisor
- Primary Faculty Advisor

## Recording Appointments

- Start at the Menu.
- Next select Appointments.
- Then click the Add Appointment button.
- A new box will open where you can fill in meeting details.

Meetings added in the future will result in a confirmation being sent to the student. Meetings added in the past do not send a notice to the student.

The Detailed Description is included in any confirmation sent to/viewable by the student in their view of the appointment.

If the student has scheduled with you online, the Detailed Description is where any notes they added about the purpose of the meeting will appear.

**Shared views and permissions:** Faculty advisors and academic advisors have a holistic view of the students who are their advisees, as well as the appointments and the notes connected to their advisees. Student support administrators may be able to see specific information relevant to the scope of their work regarding students with whom they are working. Levels of access to data within The Hive are role-based and closely mirror access faculty and staff have already been granted through systems such as Canvas and Banner. This was done to ensure that users are seeing the information pertinent to the role they have in relation to their student. See also: <https://www.csbsju.edu/the-hive/about-the-hive/privacy-notice>

**Outcomes** – After your meeting, record your meeting notes on the Outcomes Tab on the Appointment Record. The outcomes you record from student meetings/appointments are viewable to those with a shared view of the appointment.

You can elect whether you want to send a copy of the notes to the student as well.

### What else should you keep in mind?

As you record comments from meetings notes please keep in mind how you are writing and what you are recording about a student. Always be professional in your writing. Please record the details that are relevant to the student's success.

Your comments should be a few sentences and may include:

- Recording the details and items discussed that are not covered by the SpeedNotes
- The purpose of the meeting and whether the question or concern was resolved as a result of the meeting
- Did you make or do you plan to make any referrals? Is a follow up visit needed?
- Have you planned/communicated any needed next steps with the student?

Be aware when recounting details of meetings to be respectful of the student while relaying enough information to allow others to support the student should they need additional assistance or meetings with another staff member in the future. Remember that what you say and write, or don't say or don't write can be understood for something you didn't mean. Please give clear, concise but complete details.

### Writing Tips

- Be factual. You are creating a document that will be taken as an objective account of an interaction with a student to be may be used in your own follow-up conversations with the student or if a shared meeting, this may be referenced by advisors or others with permissions to view the appointment notes.
- The next person to meet with the student will be better prepared to assist the student if you document details of your session in a clear, factual manner.
- Write in first person, keeping in mind that you can only speak to what you have observed.

### SpeedNotes

After recording your notes on the Outcomes tab of an appointment record use the SpeedNotes tab to quickly document additional meeting outcomes.

- SpeedNotes have been tailored for each appointment type in The HIVE.
- Simply check off the relevant items to record assistance given or connections during the meeting.
- Click Submit to Save.

SpeedNotes are important, reports of recorded SpeedNotes may be used by your supervisor and the department for reviewing interactions with students, types of events held, and to observe trends in the type of interactions your department members are having with student as well as the support being sought by students. This may identify needs for new or additional programs or interventions based on the needs of students.

The screenshot shows the 'Add Appointment' form with the 'Outcomes' tab selected. A yellow box highlights the 'Email' section, which includes a checkbox labeled 'Send a copy of note to student'. Below this, there is a 'Comments' section with a text area and a disclaimer about FERPA standards. At the bottom, there are 'Cancel' and 'Submit' buttons.

The screenshot shows the 'Add Appointment' form with the 'SpeedNotes' tab selected. The 'SpeedNotes' tab is highlighted with a red box. The form contains a checklist of topics discussed and activities completed in the meeting, categorized into Academic, Career and/or Applications, General, and Withdrawal or Transfer. At the bottom, there are 'Cancel' and 'Submit' buttons.