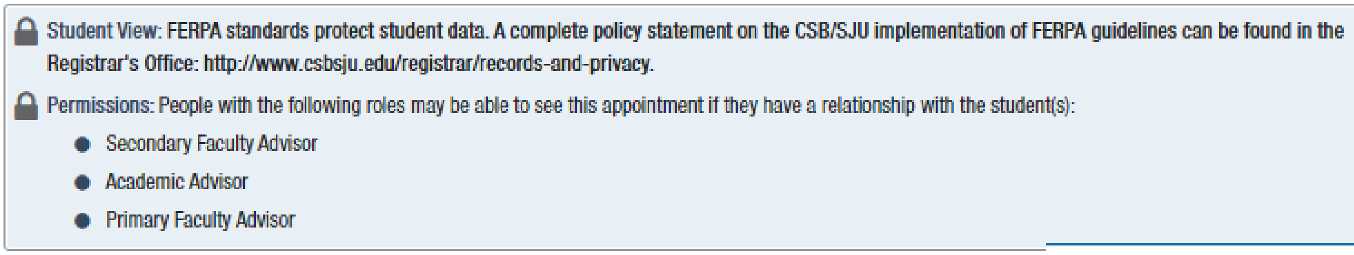
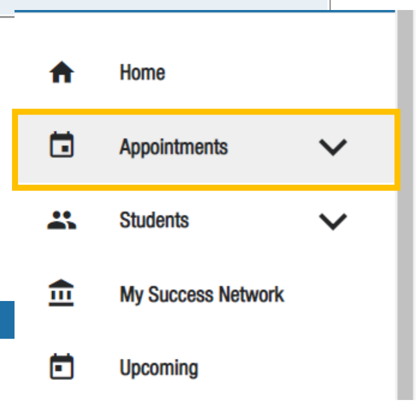
Guide to Recording Meetings and Interactions

Whether you allow students to scheudle with you online or not you can use The HIVE to record meeting notes and points of contacts with students. Your department can then use meeting data (counts of reasons for meetings and SpeedNotes) in their assessment efforts.

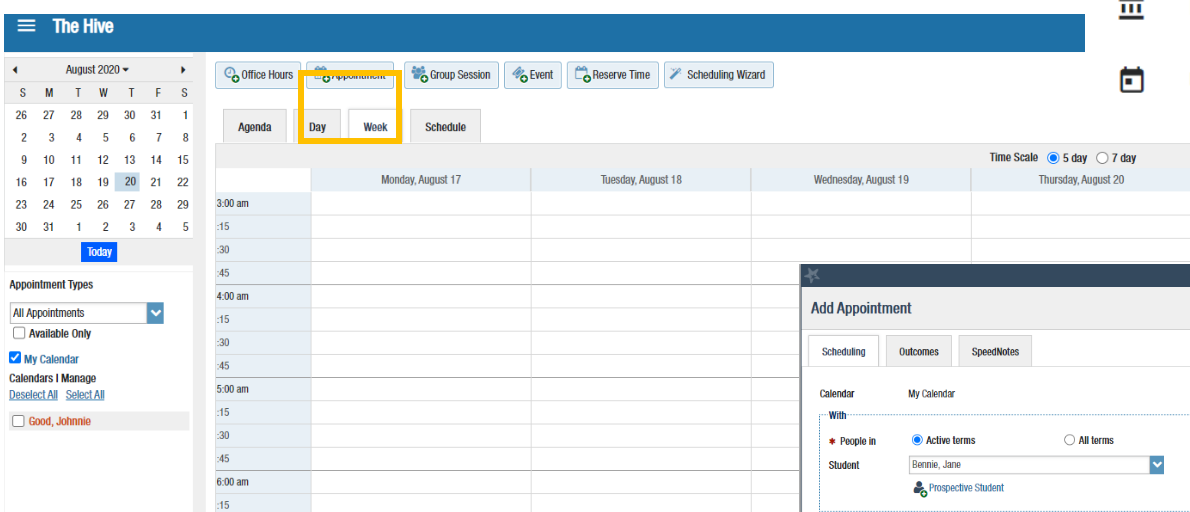
When adding notes or comments in The HIVE please keep in mind that your comments may be viewable to others and are always part of the student record in relation to FERPA (please also see The Hives Privacy Statement for more details). Keep in mind for each Flag, Referral, Note or other record, The HIVE 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.

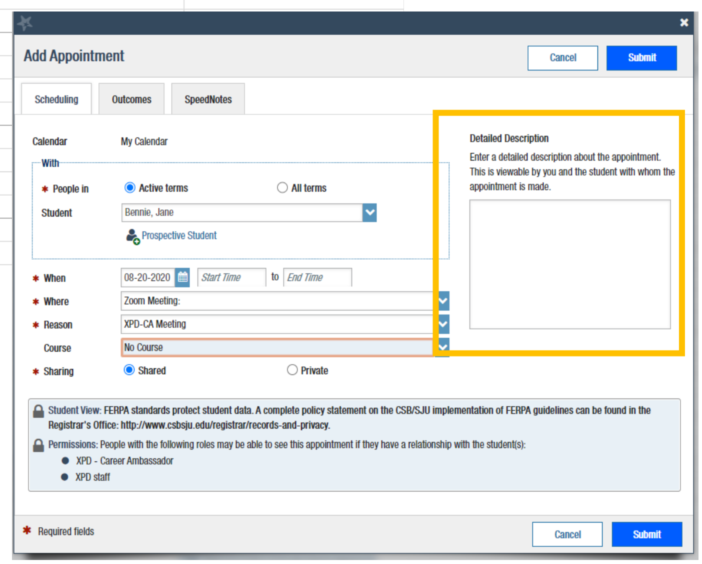




Recording New Appointments

- Start at the Menu.
- Next select Appointments.
- If adding a new appointment 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.

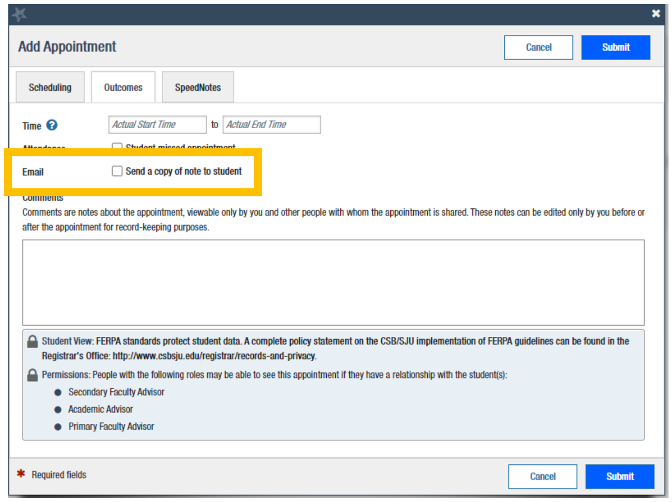
The Detailed Description is included in any confirmation sent to/viewable by the student in their view of the appointment.

The system will not let you double book yourself – if you have a conflict coming over from outlook go to outlook. You can go to outlook and remove a conflict or change the status from busy to free.

If a student signed up for the meeting online or you added the meeting to your calendar previously and you now want to add notes, simply hover over the calendar icon for that meeting to get an action box. Then go to "outcomes"

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.

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.

<u>Your comments should be a few sentences and may include</u>:

- 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 <u>don't</u> say or <u>don't</u> write can be understood for something you didn't mean. Please give clear, concise but complete details.

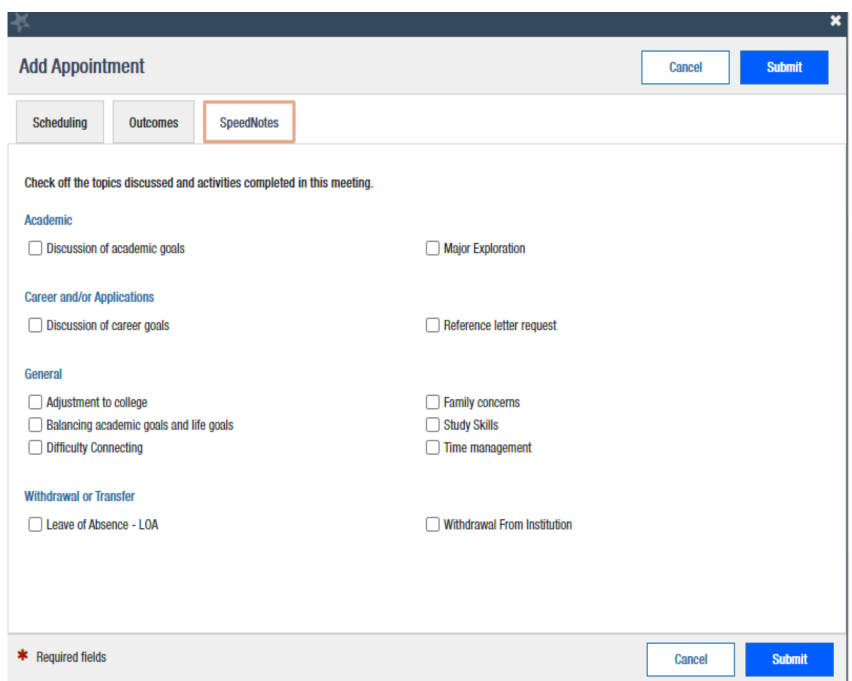
Writing Tips

- 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 <u>you</u> 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.