## Aviso Notes

Notes provide a way to record interactions and engagements with students. When you have an interaction with a student (in-person, virtual, or electronic communications), it is helpful to create a note regarding the interaction. This is particularly helpful for advising and can provide a means for a student's academic advisor to understand the student's Simpson journey.

In the Messages document, notes were referenced to document a message sent through the Aviso platform. Please refer to that section for creating a note from an email message sent via the Aviso platform.

In this document, you will be shown how to create a note after an interaction with a student. Aviso has been set up with multiple note types and unlike alerts, you can select multiple note types when creating and saving a note. Each note type carries permissions associated with defined roles and thus not all notes may be available for view. This is an important aspect of securing private, student information in Aviso. Because notes are part of a student's educational record, the creator should consider the information they include in a note.

Create note from a student profile
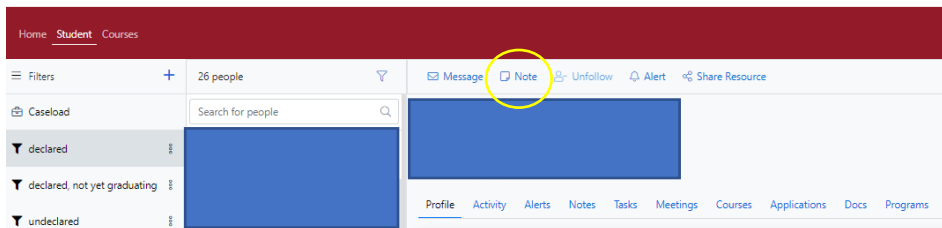
Navigate to an individual's student profile page from your Caseload, a filter, or from a course roster.

Select "Note" located above the student's name (yellow oval in left image).

A pop-up window will open where you can write the note.

Select the "Note Type(s)" relevant to the note you are creating (you can select more than one note type).

Write your note and when you are finished, select "Save."

The note will be recorded to the student's Aviso record and be available to view to those who have role-based permissions to review the note.

Notes can be edited up to 60 minutes from the creation of the note.

Notes can't be deleted. Thus, it is important that you take the appropriate care and consideration to what you write in a note. If you want to record something that is private to only you, you should keep a file in your office in a folder marked private.

Student Note History

You can review what notes (yellow oval in image below) have been created for a student by accessing their notes from their profile.
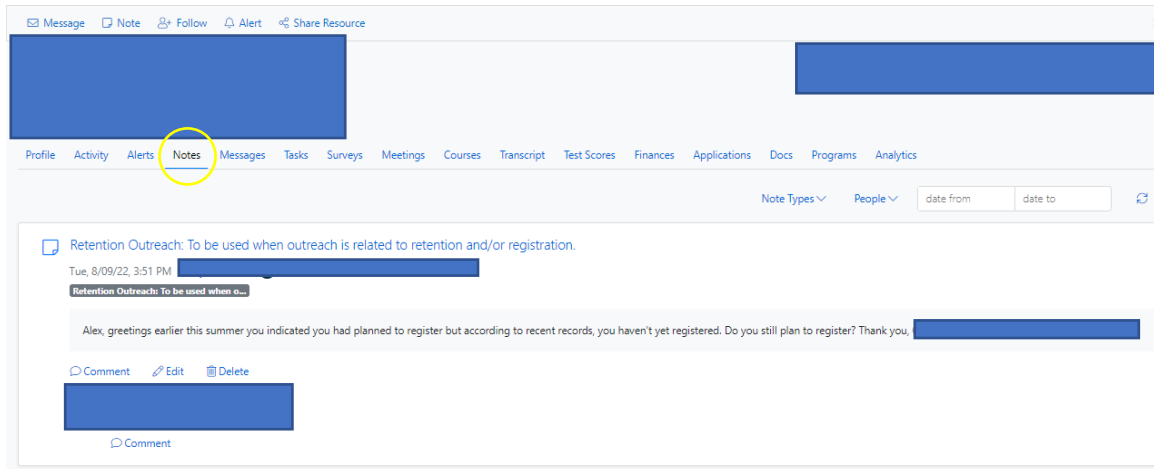
The note history that will be visible will be those that your role provides permission to see and view.

FERPA

All notes created in Aviso are considered part of a student's educational record. Therefore, when creating a note, please consider the possibility a student may see what you've recorded in a note.

If you have questions regarding FERPA, please contact Jody Ragan, Registrar.

Academic Advising
Permitted Roles: Academic advisor, Continuing & Graduate Advisor

Academic Coaching: To record outcomes of coaching sessions with students.
Permitted roles: CARs

Academic Support & Success Skills: To include topics such as time management, self-advocacy, communication with staff and faculty, stress, motivation, transition tools, and career planning).
Permitted roles: Academic advisor, Accessibility Services, Administrator, Athletic Coaches, Athletics Leadership, CARs, Dean, Registrar, Soc Team

Accessibility (may include exploration of registration process, discussion of accommodations, referrals to other campus supports or external providers, skill building, and communication with faculty and staff regarding reasonable accommodations).
Permitted roles: Accessibility Services

Athletics: To be used for athletic leadership related to student athletes.
Permitted roles: Administrator, Athletics Leadership, Athletic Coaches

Athletic coach communication with Faculty/Staff: To include conversations where a coach reaches out to a faculty/staff member to discuss a student
Permitted roles: Academic Advisor, Administrator, Athletic Coaches, Dean, TRIO

Attendance (to be utilized when having conversations about attendance-related issues).
Permitted roles: Academic advisor, Administrator, Dean, SoC Team, TRIO

CARs missed appointment: To record when students miss a scheduled appointment.
Permitted roles: CARs

Change of Major/Minor (To be used when discussions occur with a student around major/minor changes or potential major/minor changes).
Permitted roles: Academic advisor, Administrator, Dean, Registrar, TRIO

College Withdraw/Hiatus/Leave: To be used when conversations around student withdrawing, taking a hiatus, or a leave from the college/university take place.
Permitted roles: Academic advisor, Administrator, Dean, Registrar, TRIO, Student Development

Communication with faculty/staff (to be used when information regarding a student is provided from a faculty or staff).
Permitted roles: Academic advisor, Dean, Registrar, SoC Team, TRIO

Current Course Conversation: To include topics such as grades, attendance, withdrawals, and referrals to campus resources.
Permitted roles: Academic advisor, Course instructor, Dean, Registrar, SoC Team, TRIO

Face-to-face interaction: To be used when a face-to-face meeting or interaction has taken place with a student, can include general rapport building.
Permitted roles: Academic advisor, Dean, SoC Team, TRIO, Continuing & Graduate Advisor, Course instructor

Financial Aid Communication/Note
Permitted roles: Financial Aid

Motivation Encouragement Outreach: To be used when an outreach activity is to provide motivation or encouragement to students.
Permitted roles: Academic advisor, Dean, SoC Team, TRIO, Continuing & Graduate Advisor

Residential (can include housing concerns, roommate issues, accommodation needs, etc.)
Permitted roles: Residence Life

Retention Outreach: To be used when outreach is related to retention and/or registration.:
Permitted roles: Academic advisor, Dean, Registrar, TRIO, SoC Team

Student Development (notes for Student Development staff).
Permitted roles: Residence Life, Student Development

Student Finances (To represent conversations with students regarding student accounts, holds, and other financial concerns/needs)
Permitted roles: Financial Aid, Student Accounts, Student Development, TRIO

Students of Concern (notation that an early alert or other notification shared with SoC).
Permitted roles: Athletics Leadership, CARs, Dean, Registrar, Residence Life, SoC Team, TRIO

Technology: To be used when assisting students with campus technology such as navigating the LMS, log in issues, and syncing email to a smartphone.
Permitted roles: Academic advisor, Dean, TRIO

TRIO (Student Support Services staff notes, referral to TRIO, etc.).
Permitted roles: TRIO

Note: For administrative purposes, some notes may be visible to the system Administrators when needed. Otherwise, notes are visible based upon the current assigned roles as noted above.