

## Navigate EAB Documentation Guidelines

### Why should I document student interactions in Navigate EAB?

Faculty and staff can use Navigate EAB to document important and relevant information to be shared across offices to support student success. By documenting your appointments, interactions, and referrals in EAB, you create a smooth and supportive experience for our students. It saves students having to repeat critical information and helps us connect students with information and resources as quickly and efficiently as possible.

### Appointment Summaries vs. Notes

Appointment summaries provide a brief report on your meeting with a student, while notes can be thought of as "sticky notes"- important information about a student that other faculty/staff should know about the student *outside of a meeting*. Appointment Summaries and Notes create a history of how different offices serve students and reports to support the retention of students.

**Who can see appointment summaries and notes?** SUSLA faculty and staff can view appointment summaries, notes, and alerts on a student's file in EAB (as well as academic information such as schedule, registration status, and grades). Information stored in EAB is part of the student's academic record and falls under FERPA guidelines. Therefore, we encourage you to be thoughtful and discerning regarding what is included in your summaries and notes.

**Please note:** Students *cannot* view appointment summaries, notes, and alerts on their own file. *However*, they can request to view these records.

## Documentation Do's & Don'ts

Documentation Do's	Documentations Don'ts
<ul style="list-style-type: none"> <li>• Report on your appointment within 2 business days so that information is shared in a timely manner across campus</li> <li>• Remain objective and factual. Focus on a summary of what was discussed in appointment (this prevents repetitiveness among campus partners)</li> <li>• Include information such as recommendations, advice, referrals, and action plans made with the student</li> <li>• Use general language when noting sensitive material (ex: student discussed difficult situation affecting her academic progress)</li> <li>• Include information that is helpful for 'future you' and colleagues to understand the conversation and plan for future activities with the student</li> </ul>	<ul style="list-style-type: none"> <li>• Do not include details of sensitive/personal information on the student that may be viewed by other faculty/staff (mental health or medical concerns, relationship problems, family concerns, etc.)</li> <li>• Do not diagnose, speculate, or label a student (e.g. "student doesn't seem to care", "I think the student has allergies")</li> <li>• Do not make statements regarding a student's disability (ex: state that the student has been referred to resources instead of 'student has dyslexia')</li> <li>• Do not use jargon or uncommon abbreviations/acronyms that may be difficult for colleagues in different offices to understand</li> </ul>
<p><b>A final thought:</b> When in doubt, leave it out. If you would not feel comfortable saying this to the student in person, then you should not include it in your summary or note.</p>	

## Notes

To add a note to a student's file, go to the student's profile in EAB and click "Add a Note on this Student" on the right. Then, select a Note Reason (to categorize the note) and write your note in the textbox. Common note reasons include:

- **Academic Note – Course Changes:** Student is changing their schedule (ex: adding, dropping, withdrawing from a class)
- **Academic Note – General**
- **Academic Note – Major/Minor Change:** Student is adding/dropping/changing a major or minor.
- **Academic Plan/Advising Worksheet:** Advisors can upload an advising worksheet or summarize an academic plan for the student
- **General Note:** Updated cell phone numbers, preferred name and pronouns, etc.
- **Parent/Family Feedback:** Parent/family has contacted faculty/staff at SUSLA

**ADD A NOTE TO JAKE ABBATE**

Note (Required)

Paragraph **B** *I*

Attach File  
Choose File No file chosen

Note Subject  
Freshman  
Business Management (MGM5)

Relations  
Note Reason  
Note URL

Visibility  
 Willie Siglar Only?  
 Jake Abbate?

Cancel Save Note

SUSLA

Options  
I want to...  
[Message Student](#)  
[Add a Note on this Student](#)  
[Add a To-Do to this Student](#)  
[Report on Appointment](#)  
[Create Request for Appointment](#)  
[Schedule an Appointment](#)  
[Add to Student List](#)  
[Issue an Alert](#)  
[Edit User Settings](#)

## Appointment Summaries

To report on a scheduled appointment on with a student, go your EAB homepage, then to the Appointments tab in Navigate EAB and scroll down to “Recent Appointments”. Then, select the appointment to report on, click Actions, then “Add Appointment Summary”. Your appointment information (such as date, time, and location) will pre-populated so that you are able to add your appointment summary in the Appointment Summary box (please disregard the Summary Details portion of the box). When finished, click “Save Report”.

You can also report on an appointment with a student by going to the student’s file, then clicking the “Report on Appointment” link in the menu on the right side of the page. You will need to first select your Care Unit, Location, Service, and Meeting Type, then input the date and time of the appointment before completing your appointment notes.

### Adding an appointment summary through Appointments tab:

The screenshot displays the 'Reporting' interface. On the left, a table titled 'Recent Appointments' lists various appointments with columns for ID, Date, Time, Service, Location, and Duration. An 'Actions' menu is open over the first appointment, showing options like 'Add Appointment Summary', 'Mark No-Show', and 'Issue Alert'. On the right, an 'APPOINTMENT REPORT FOR' form is shown, which pre-populates appointment details such as 'Success Coaching' and '12/14/2022 11:00am - 11:30am ET'. The form includes sections for 'Summary Details For' (with dropdowns for Assignments Discussed, Objectives of the Season, and Goals for Next Session), 'Appointment Summary' (with a rich text editor), and 'Attachments'.

### Adding an appointment summary through student’s file:

The screenshot shows a student's file page. At the top, there are navigation tabs: Overview, Success Progress, History, Courses, Major Explorer, Path, Academic Plan, and More. Below this, a summary card displays '0' for 'Total Credits Earned', '0%' for 'Credit Completion % at this institution', and 'Unpredicted' for 'Predicted Support Level'. On the right side, an 'Options' menu is open, listing actions such as 'Message Student', 'Add a Note on this Student', 'Report on Appointment', and 'Schedule an Appointment'.

## But what if the student wants/should talk to \_\_\_\_?

You can connect a student to another resource across campus by issuing a referral alert in EAB. Go to the student's profile and click "Issue an Alert" on the right side of the screen. When selecting an Alert Reason, choose from any of the following referral options. An email will be sent to that office and someone will reach out to your student shortly. **For more information on alerts and referrals**, check out the Alert Workflow Document on [EAB Navigate Resources website](#).

- **Success Coach (Student Success Center)** - Faculty/staff wants student to connect with Success Coach
- **Allied Health and Nursing** – Student requires support from Allied Health or Nursing programs advisor.
- **AHSE** – Student requires support from AHSE academic program advisor
- **B-STEM** – Student requires support from B-STEM academic program advisor
- **Tutoring** – Student would has requested or will benefit from tutoring services
- **Student Support Services** - Student qualifies for and may benefit from TRIO or additional student support services

**ISSUE ALERT**

Student: Jake Abbate

Please select a reason

Is this associated with a specific class?

Additional Comments

Please enter a comment

Cancel Submit

**SUSLA**

Options

I want to...

[Message Student](#)

[Add a Note on this Student](#)

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

[Report on Appointment](#)

[Create Request for Appointment](#)

[Schedule an Appointment](#)

[Add to Student List](#)

[Issue an Alert](#)

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