EAB Navigate - Recording Appointment Summaries and Notes

Navigate is a web-based tool from the Education Advisory Board (EAB) that 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.

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 student support staff communicate and provide consistent, informed service
- Create an "institutional memory" of contacts and recommended actions
- Record valuable data on student use of support services and associated outcomes

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 important 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.

What's the difference between an Appointment Summary and a Note?
- Appointment Summaries document important information about advising appointments, such as dates, times, reasons and locations. An Appointment Summary should always be tied to a specific advising encounter between you and a student or group of students.
- Notes describe information about the student that you gained outside of an appointment, such as through an email. They are often more transactional in nature (e.g. the Registrar's office: student is processing course waiver for course X in order to graduate from the 202009 BAT Program of Study).

*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 Navigate advising platform 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:

✓ 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.?

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"Describe, don't evaluate"
"When in doubt, leave it out"

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✓ Appointment Summaries and notes should be academic-related and avoid including personal, potentially sensitive content.

✓ Personal and/or sensitive content, whether reported by the student or assumed by you, may include:

- Medical / mental health concerns
- Legal problems
- Relationship problems
- Family concerns
- Conflicts with specific instructors
- Information about academic integrity or student conduct proceedings

Recording Appointment Summaries and Notes in Navigate

Do	Don't
Briefly summarize what was discussed as it relates to student success for future reference by the student, other support staff, and future advisors:	**Summarize *everything* that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals, and follow-up plans.**
- Recommendations: "Recommended student take MAT 151 to create a more solid math foundation." - Advice: "Cautioned against taking 18 credits this semester given work schedule" - Referrals: "Referred to Student Financial Services" - Action Plans: "Student plans to follow up with tutoring and schedule an appointment with me after midterms."	- Include unnecessary details: "She said she has been having a good week and is especially excited about moving into a different apartment." - Include personal/sensitive information: "Student disclosed that she has been visiting the Counseling Center." - Include subjective opinions.
Summarize specific course recommendations	**Report problems with specific instructors**
"Encouraged student to take HIS 120 as a gen ed." "Recommended student take BIO 105 spring semester 2021."	"Student doesn't like his MAT 151 instructor." "Student said PHI 120 professor has unfair grading policies."
Spell things out for a general audience Write fact-based academic-related notes	**Use acronyms students and other campus support staff may not understand** **Include speculation, subjective opinions, or judgments**
"Student is concerned about grades in two courses." "Student is considering whether his current major is a good fit. Helped him consider other options."	"I don't think she is very motivated this semester." "His personality isn't a good fit for STEM fields. I think he'd feel more at home doing something artistic or creative."

● "Student needs to successfully complete PSY 102 before taking any upper level PSY courses."	● "She has probably been avoiding BIO 211 because she struggled with BIO 101."
Use general or coded language concerning sensitive material	**Include sensitive information, personal concerns, private matters**
● • "Student reported **extenuating circumstances** related to his academic progress this semester." ● "She discussed a **difficult situation** and requested help from a campus support service." ● "Student disclosed a **personal situation** that's having an impact on how things are going this semester."	● "Student's parents are going through a divorce." ● "She reported she was assaulted by her boyfriend earlier this year." ● "Student was recently diagnosed with an autoimmune disorder."
Record referrals made and resources shared	**Report details surrounding sensitive referrals**
● "Shared information about the Counseling Center." ● "I discussed resources at Student Health Service. ● "Referred to Financial Aid Office." ● "Referred to Office of Student Success."	● "He said he can't concentrate because of relationship problems with his girlfriend. I referred him to the Counseling Center." ● "He said he's been having a lot of headaches lately. I'm concerned something more serious may be going on. I suggested he go to a doctor to get it checked out." ● "Little financial support from family. First Generation student with significant debt building up."
Include notes about positive student behaviors	**Include negative judgements student behaviors**
● "Student came prepared for session with course plan filled out." ● "He has spent time talking with two Sociology professors to learn more about potentially changing to that major."	● "She seems like she just blows off advising appointments. I can't get her to be serious and plan ahead." ● "He seems pretty uninformed about the real world after college and hasn't followed through with plans to get information from his Sociology professor. I think he needs to be more realistic."

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. Remember to email navigate@northshore.edu with any technical questions or concerns.

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.*

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

For appointments scheduled through Navigate

1. From your **Staff Home** screen, you will see all **Recent Appointments** (those appointments where the start time has already passed, if even by one second). Select the check box

2. After selecting the appointment, click **"Actions ▽"** above that table, then select **Add Appointment Summary**.

next to the appointment for which you would like to create an **Appointment Summary** .

Recent Appointments

Care Unit: All care units ▾ ⓘ

Actions ▲

Add Appointment Summary

Mark No-Show

☐ 1/1   11/10/2020
3:30pm - 3:45pm ET

3. Select your **Care Unit**. Selecting your **Care Unit** populates the remaining selections for your **Appointment Summary**. **Location** and **Service** must always be selected. *Note: The more details you populate, the greater your ability to report on various types of appointments at a more granular level.*

Appointment Details

Care Unit
Advising ▾

Location
Select Location ▾

Service
Select Service

Course
Start typing to search all courses ▾

Date of visit
11/25/2020

Meeting Start Time   **Meeting End Time**
3:21pm   to

All times listed are in Eastern Time (US & Canada).

Attendees

BRENDAN STAMM
Administration, Advisor, Student
☑ Attended

Other
SPECIAL STUDENT
☑ 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 ▮▮▮▮▮▮▮▮▮▮

Discussion

Goals/ Next Steps

Student arrived on time and was ready to begin our session.   ○ Yes ○ No ○ N/A

Student was prepared for meeting.   ○ Yes ○ No ○ N/A

Student asked for explanation of material not understood?   ○ Yes ○ No ○ N/A

Student responded positively to instruction (as you suggested)?   ○ Yes ○ No ○ N/A

Student shows a better understanding of academic goals since our last session.   ○ Yes ○ No ○ N/A

Appointment Summary

B *I*   ≔ ≔ 𝒮   Paragraph ⌄   ↶ ↷

Attachments

▭ Attach File
Choose File   No file chosen

ⓘ 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.

[Save this Report]

Under Appointment Details Heading:
Care Unit - Select your care unit, such as Advising.

Location - Select where you met with this student (Danvers, Faculty Office, Virtual, etc…) **Service**

- Select what you assisted the student with during the appointment. Multiple fields 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.

Under Summary Details Heading:

Discussion - What topics did you discuss? Sample options include:

Academic Advising
Career Advising
Change of Program Advising
Commonwealth Commitment Advising
Course Registration Advising
Early Alert Advising
ESL Advising
Financial Aid Advising
Graduation Degree Evaluation
Group Advising
Midterm Alert Advising
Personal Advising
Section 30 Advising
Special Withdrawal Advising
Suspension Advising
Transfer Advising

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

Student arrived on time and was ready to begin our session. - Select Yes, No, or N/A

Student was prepared for meeting. - Select Yes, No, or N/A

Student asked for explanation of material not understood? - Select Yes, No, or N/A

Student responded positively to instruction (as you suggested)? - Select Yes, No, or N/A **Student**

shows a better understanding of academic goals since our last session. - Select Yes, No,   or

N/A

Appointment Summary - This is where your narrative recap will be included. Following the
recommendations above and the Do's/Don'ts, include any and all relevant information from your

appointment with the student. Any information that you feel would be beneficial for other members of the college community to know if they work with the student later on (i.e. student plans to apply to Nurse Education, student's goal is to transfer to UMass Lowell or Salem State, student has not submitted transcripts from Bunker Hill and may have transfer credit for BIO 101 from there, etc…) should be included. Notes that would have been included in Banner/SPACMNT after student appointments would be included here.

If student did not attend, uncheck the "Attended" box under their name and type "Student did not attend scheduled appointment." in the Appointment Summary box on the right hand side.

4. When finished, click **Save this Report**   . The report will be visible under the   **History**   tab on the student profile.   **For appointments that were not scheduled through Navigate:**
1. Visit the profile page for the student.
2. Under **Staff Alerts**   on the right side of the screen, select "   **Report on Appointment**   "

3. Follow the same procedure as outlined above to complete this Appointment Summary:

Appointment Details

Care Unit

Advising ▾

Location

Select Location ▾

Service

Select Service

Course

Start typing to search all courses ▾

Date of visit

11/25/2020

Meeting Start Time **Meeting End Time**

3:21pm to

All times listed are in Eastern Time (US & Canada).

Attendees

BRENDAN STAMM
Administration, Advisor, Student

☑ Attended

Other
SPECIAL STUDENT

☑ 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 ▬▬▬▬▬▬▬▬

Discussion

Goals/ Next Steps

Student arrived on time and was ready to begin our session.	○ Yes ○ No ○ N/A
Student was prepared for meeting.	○ Yes ○ No ○ N/A
Student asked for explanation of material not understood?	○ Yes ○ No ○ N/A
Student responded positively to instruction (as you suggested)?	○ Yes ○ No ○ N/A
Student shows a better understanding of academic goals since our last session.	○ Yes ○ No ○ N/A

Appointment Summary

B *I* ☰ ☷ 🔗 Paragraph ▾ ↶ ↷

Attachments

🔗 Attach File

[Choose File] No file chosen

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.

[Save this Report]

4. When finished, click **Save this Report**. The report will be visible under the **History** tab on the student profile.

Creating Notes

While the **Appointment Summary** is a great way of documenting interactions with students related to advising interactions with them, **Notes** are generally the best way to document important non-advising

information pertaining to the student (such as Health Profession goals, career plans, graduation applications, course substitution approvals, etc...). In future EAB Navigate updates, if you want to have information that the student will have access to view, including information from an **Appointment**
, you will want to include that in a **Note**.   **Notes** are a useful way of storing attachments on the student record and for sharing information with faculty/staff and/or students.

We often have interactions regarding students that we want to make note of for future reference. In the past, faculty/staff may have written something and stored it in the student file or even stuck a sticky note as a reminder for the next time they visited that student's file.

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How to record a Note

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1. From any student profile, click **Add a Note on this Student** from the **Staff Alerts** menu on the right side of the page.

2. Write the text of your note in the **Note (Required)** field.

3. Add any relevant **Attachments (such as a degree evaluation)**.

4. You must select a **Note Reason**. If none of the available options are relevant to your **Note**, contact navigate@northshore.edu to discuss the possibility of adding an additional option.

5. Indicate to whom your **Note** will be visible by checking any of the following options. *Please note, at this time Notes are not visible to students, but may be in future Navigate upgrades*:

a.   **{Your Name} Only**—selecting only this option will make the **Note** only available to you. Please remember that any **Notes** you save, regardless of their visibility in Navigate, are connected to the student academic record and may be requested by the student through appropriate legal actions. ***This is not recommended if the note would be helpful to other members of the NSCC community.***

b.   **{ Student Name} Only**—selecting   only   this option will make the   **Note**   visible to the student when   Navigate provides this functionality. This **Note** would also be available to view by anyone who has access to the student's profile (including you).

c.   Both **{ Your Name} Only** and **{Student Name} Only**— only you and the student would see this **Note**. ***This is not recommended if the note would be helpful to other members of the NSCC community.***

d.   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 at this time.***

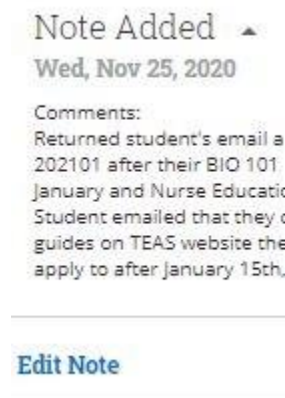**6. Click Save Note.** The Note will be visible under the **History** tab on the student profile

   Remember: All information you enter into Navigate becomes a part of students' official academic record. Students have the legal right to review their entire academic record.

1. From any student profile, click the "**History**" tab. Under the {Student Name} History field, you
should see your note listed:
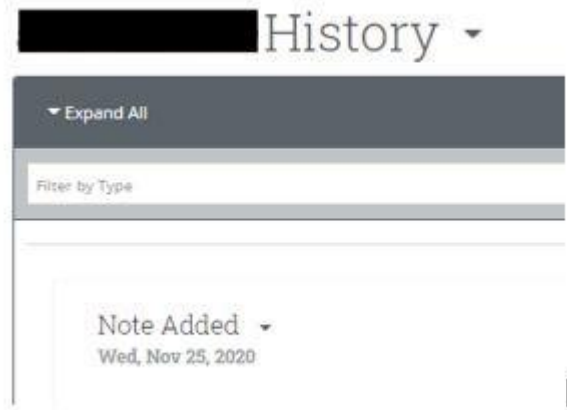
2 Click on the Note and you will see a blue "**Edit Note** " link.

 Click on this to return to your Note report to make any additions to your comments.
3. Click Save Note. The Note will be visible under the **History** tab on the student profile.

Appointment Summaries vs. Notes

Appointment summaries are advising interactions - scheduled or unscheduled, Zoom meetings, phone
calls, email correspondence, etc… Interactions with students on Live Chat would not be put in Navigate,
unless further interactions occur with the student off of Live Chat.

Notes can be viewed as information regarding the student but not stemming from an advising interaction.
This can be updates like those below that 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 ●   Signed up for a Transfer visit with 4 year school?
- Denied acceptance to Special Admissions program
- Suspension Hearing results