

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? Xavier 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.

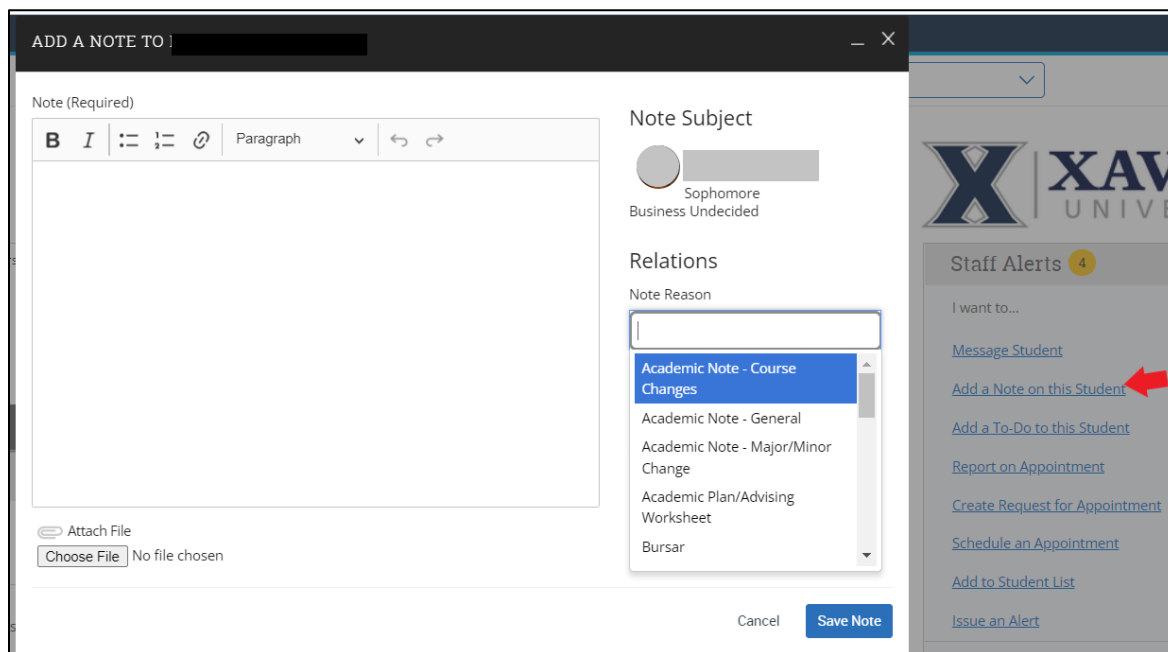
Documentation Do's & Don'ts

| Documentation Do's | Documentations Don'ts |
|---|---|
| <ul style="list-style-type: none"> • Report on your appointment within 2 business days so that information is shared in a timely manner across campus • Remain objective and factual. Focus on a summary of what was discussed in appointment (this prevents repetitiveness among campus partners) • Include information such as recommendations, advice, referrals, and action plans made with the student • Use general language when noting sensitive material (ex: student discussed difficult situation affecting her academic progress) • Include information that is helpful for 'future you' and colleagues to understand the conversation and plan for future activities with the student | <ul style="list-style-type: none"> • 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.) • Do not diagnose, speculate, or label a student (e.g. "student doesn't seem to care", "I think the student has allergies") • Do not make statements regarding a student's disability (ex: state that the student has been referred to resources instead of 'student has dyslexia') • Do not use jargon or uncommon abbreviations/acronyms that may be difficult for colleagues in different offices to understand |
| <p>A final thought: 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 Xavier



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 shows the Reporting interface with a table of recent appointments. The table has columns for Actions, Service, Course, Comment, Attendee, and Time. The 'Add Appointment Summary' action is highlighted for the first appointment. An 'Appointment Report Form' is overlaid on the right, showing pre-filled details for a 'Success Coaching' appointment on 12/14/2022 at 11:00am - 11:30am ET. The form includes fields for Care Unit, Location, Service, Meeting Type, Date of visit, Meeting Start Time, Meeting End Time, and Attachments. A text area for the 'Appointment Summary' is also visible.

Adding an appointment summary through student’s file:

The screenshot shows a student's file page for a student in the Computer Science program. The page displays various statistics such as Course Grade D/F (0), Repeated Courses (0), Withdrawn Courses (0), Missed Success Markers (0), and Cumulative GPA (3.20). On the right side, there is a 'Staff Alerts' section with a list of actions. The 'Report on Appointment' link is highlighted with a red arrow.

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](#).

- **Career Development Office** - Student expresses that they want to explore CDO services, exploring majors, career related reasons (career uncertainty, questioning major)
- **Commuter Services** - Student expresses concern about ability to connect with Xavier as a commuter student
- **Housing (Residence Life)** - Student shares information that housing should know (ex: roommate conflicts, student wants to connect with RA)
- **Possible Transfer Out of Xavier** – This will alert the student’s Success Coach that the student is considering transferring out of Xavier.
- **Student Involvement** - Student expresses concern about belonging (ex: wanting to join clubs, wanting to connect with other students)
- **Study Abroad (CIE)** - Student has expressed interest in wanting to study abroad
- **Success Coach (Student Success Center)** - Faculty/staff wants student to connect with Success Coach

The screenshot displays the 'ISSUE ALERT' modal window. It includes a 'Student' field, a 'Please select a reason' dropdown menu, a checkbox for 'Is this associated with a specific class?', and a text area for 'Additional Comments'. The dropdown menu is open, showing a list of referral options. The 'Issue an Alert' link in the background interface is highlighted with a red arrow.