Documentation Guidelines in EAB Navigate

All documentation recorded in Navigate is part of a student's academic record. Navigate is intended to capture academic-related information. When documenting in Navigate, keep FERPA in mind and consider the following guidelines:

- Assume students and others could read anything you have written.
- Avoid personal, potentially sensitive content.
- Describe, rather than evaluate. When in doubt, leave it out.
- Ask yourself the following questions:
  - Is this something the student would want other people to know?
  - Is this something another advisor/office would need to know? Why?
  - Is this something that is within my scope of practice to say?

Concerns regarding illness, injury, death of family member or friend, mental health, safety or insecurity, and other non-academic issues should be directed to CARE Team in the Dean of Students Office. *Do not include sensitive, personal, or subjective information in Navigate*.

If you have questions, please contact: navigate@uww.edu

Appointment Summary Reports document information about specific student appointments. They are only viewable to other staff within the same Care Unit, depending on the permissions granted to a staff member's role in Navigate.

Notes record information related to a student profile and are not tied to specific appointments or Care Units. They are viewable to other staff, depending on the permissions granted to a staff member's role in Navigate.

Appointment Summary Reports

Appointment Summary Reports are used to document substantive interactions with students:

- Appointment Summaries should be filled out after a meeting OR a substantive interaction (drop-in, email).
  - **Example**: A student makes an appointment with their advisor to talk about the difficulty they are having in their math course. The advisor discusses with the student different strategies they can use and other resources they can access at UWW. The advisor fills out the Appointment Summary Report to reflect the appointment and what was discussed.
- Other key points:
  - Appointment Summary Reports should have all the information filled out, including meeting types (in-person, phone, WebEx, email, etc.).
  - When creating an appointment summary report for a drop-in interaction, simply select "***Report on Appointment***." By doing so, an "appointment" will be logged in the platform.
  - If you are reporting on a scheduled appointment, make sure you log the Appointment Summary Report under the "Recent Appointments" box on your home screen.

Notes

The notes feature allows information to be viewed by individuals in other care units.

- Use this feature when you have information about a student that may not be specific to an appointment and may be useful for individuals in other care units to know.
- **Example:** A student mentions that they are on the basketball team.
- **Example:** Student prefers being called 'Nicki'.