

EAB Navigate Guidelines for Advisors

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The Purpose of Documentation in EAB Navigate:

- Navigate Appointment Summary Reports (ASRs) enable a seamless and tailored advising experience for students from matriculation to graduation, aiding rapport building, FERPA-compliant tracking of academic progress and needs, as well as timely intervention when necessary.
- Advisors have access to ASRs as well as Notes within the Navigate platform. The Notes feature is used for notes-to-self for advisors, while the ASRs feature is used to document information that may need to be conveyed to others in the academic network.
- Advisors must mark notes as only viewable by the advisor.
- All Advising documentation (ASRs and Notes) are a part of the official student record and are, in some cases, sharable with other members of the student support network (such as student affairs). Good advising notes can help facilitate collaboration within the School of Medicine and with relevant campus partners to promote students' success throughout their academic careers.
- Navigate enables the documentation of pertinent, consistent, and accurate notes that chronicle student progress toward a degree, barriers to advancement, and opportunities for the future.

General Content:

- Advisors should enter documentation for a student record after advising encounters (face-to-face, phone, or digital).
- Entries should be timely and purposeful, utilizing a professional and objective description of the facts to clearly convey relevant context, history, and next steps. Discretion should be exercised when documenting certain issues related to health, familial, or other sensitive topics (see **FERPA and Privacy** below for additional information).
- Commonly Included Items:
 - Student questions and concerns
 - Advisor recommendations
 - Relevant metrics and benchmarks the advisor would like to track
 - Relevant requirements, policies, and procedures discussed
 - Referrals made by the advisor
 - Action items and next steps for students and advisors
 - Observations to guide future discussion

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Practice Guidelines:

Well-crafted documentation can provide a longitudinal portrait of a student's progress. When creating documentation, consider the value and pertinence of the information included to the student's record—being particularly mindful of maintaining appropriate levels of disclosure. Fact-based, objective information helps convey the unique dynamics of each student advising interaction. Brief, succinct documentation allows for ease of future reference and, when needed, transmission to relevant members of the support network. In lieu of subjective comments about a student, focus on facts and events without inferring intent or character judgement. Summarize and contextualize the content of conversations to identify barriers and opportunities. Commonly covered domains may include, but are not limited to:

- Student goals and career interests
- Academic performance (successes, barriers)
- USMLE preparation (strategy, timeline, extended study considerations)
- Letters of recommendation
- Remediation needs and low performance flags
- Scheduling priorities and concerns (curricular requirements)
- Summer plans
- Research opportunities
- Match considerations
- Professional development
- Personal statement development
- CV
- Leaves of absence
- Dual degree plans

FERPA and Privacy

As a general rule, under the federal **Family Educational Rights and Privacy Act (FERPA)**, information may not be released from a student's education records without his or her prior written consent.

Any information you enter into Navigate pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined FERPA.

Training on UNC School of Medicine's FERPA practices are available through our [online FERPA site](#). Anyone with access to the Navigate platform will be required to complete training before being granted access.

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Areas of Concern and Increased Sensitivity:

- Exercise care with language related to personal or sensitive referrals.
 - Do not diagnose, assess, or offer subjective judgement about the student or their circumstances.
 - Without recording explicit details consider merely listing the office involved as a prompt to future follow-up or check-in. Alternatively, you might elect to employ a generic statement (e.g. “Student reported facing a challenging circumstance. Referred student to [name of department/office].”)
- Information about other students should not be included.
- Please refer to the Director of Student Affairs or a Navigate Application Administrator with any questions about special reporting requirements.