

EAB Navigate Guidelines for Staff

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The Purpose of Appointment Summary Reports 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.
- ASRs are a part of the official student record and are, in some cases, sharable with other members of the student support system (such as student affairs and advisors). Good reports 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 reports that chronicle student progress toward a degree, barriers to advancement, and opportunities for the future.

General Content:

- Staff should enter ASRs for a student record after student encounters (face-to-face, phone, or digital).
- Reports 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
 - Staff recommendations
 - Relevant metrics and benchmarks staff would like to track
 - Relevant requirements, policies, and procedures discussed
 - Referrals made by the staff
 - Action items and next steps for students and staff
 - Observations to guide future discussion

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Practice Guidelines

Well-crafted ASRs can provide a longitudinal portrait of a student's progress. When creating reports, 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 interaction. Brief, succinct reports allow 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 in 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 for questions about special reporting requirements.