

Introduction to EAB Navigate

Guidance for Recording Notes

Access the Navigate icon in the **AccessUH** portal.

Guidance for Recording Notes

EAB Navigate allows UH academic advisors, staff, and faculty to share advising and service notes to support student success and to deliver more coordinated, consistent, and integrated student support. While the ability to record notes affords a collaborative approach to student success, it is vital that UH staff fully understand the legal and ethical responsibilities associated with notetaking in a shared advising platform.

This document provides brief guidance about best practice in recording student notes, and then links to a selection of more detailed notetaking guidance offered from other institutions.

- **Students ARE able to see Notes recorded about themselves.** *Be as clear as you can in your comments, focus on class performance, and write with the student as the intended audience.*
- Leaving a brief note documents that a meeting took place, and allows other staff assisting a student to contact you separately by phone as needed. You may also consider keeping your own personal notes outside of Navigate if you would like to remember additional details.
- **Include in notes:** Brief information that will help advisors or other staff who interact with the student understand the student's course-related issues or the advice that you have given, and if appropriate, possible consequences of not following advice given. Include referrals of a non-sensitive or general nature, but leave out details.
- **Exclude from notes:** Subjective judgments, personal concerns, referrals of a sensitive or personal nature, and comments regarding other instructors or other staff members.

Additional Examples of Note Guidance from other Institutions:

- [Guidance on the Content of Shared Advising Notes](#) (University of California Berkeley)
- [Guidance on the Content of Undergraduate Advising Notes](#) (University of Notre Dame)
- [Guidelines for Advising Notes](#) (Missouri State)
- [Advising Notes Dos and Dont's](#) (Missouri State)
- [Advising Notes Guidelines](#) (University of Massachusetts Amherst)

[UH FERPA Guidance](#)

Find additional resources here: <http://www.uh.edu/ussc/navigate/>
Need help? Email navigate@uh.edu