EAB Navigate Practice Exercises #2

Exercises for Exploring Key Areas of the EAB Navigate Platform

Access Navigate through AccessUH.

Appointment Reports

Appointment Reports are detailed templates used to record an advising appointment or other direct contact with a student (in-person, email, or phone).

- Search for a student.
- From the student's Overview page, select **Report on Appointment** from the right navigation.
- Under **Care Unit**, select "Advising."
- Under **Location**, select the appropriate location for where you provide advising service. Locations are organized by college.
- There are two types of **Services** that UH will use:
    - **Services** (marked with asterisks) are based on majors or minors within a college to route students for advising for their current or prospective major or minor or other campus student services. Students will select one of these services when making the appointment. These Services are marked with an asterisk so they appear first on your drop down list, and you may choose any that apply.
    - **Advising Reasons** (non-asterisk) are also available in the Service drop-down list, and are used by advisors to record the topics covered in the advising session. Advising Reasons are standardized across all advising offices and are only visible by advisors – students will not see this list. The list is long to allow you to label reports accurately, however items fall into just 6 categories: Advising, At-Risk, Form, Information, Referral, and Year/Semester anticipated for degree plan or graduation. You can easily scroll down to choose as many reasons as you like that apply to this appointment.
- Under **Course**, you can select a course if your student wants to discuss something in particular. Otherwise, leave blank.
- The date, attendees, and time should pre-populate.
- You can choose to list a recommended follow-up date for the next meeting.
- On the right side of the Appointment Report, you'll first see four open text boxes where you can take notes on your discussions related to **Degree progress**, **Academic or career goals**, **Barriers**, and any **Referrals** you are making. These items are tied to our Advising Survey.
- Next you'll see six yes/no radio buttons related to your discussion; these items are also tied to our Advising Survey.
- Finally, you'll be able to add additional notes or next steps in the large text box on the lower right. Terms embedded in the free text field will be searchable.
- You may attach any informal documents or notes used for this advising appointment. Don't attach documents that should be uploaded to IRIS, and know that the text of the attachment will not be searchable.
- Consider ending your advising appointments by going back over your selections on this form with the student as kind of a final check that you have answered all of the student's questions.
- Make sure to click **Save this Report**.

Notes

Notes are used when an advisor is not meeting with a student, but would like to record information, such as when reviewing a student's records. Notes can also be used to label and upload internal forms and handwritten advising notes. This area should not be used for uploading forms that would be uploaded to IRIS or other college or university systems.

- From a student's Overview page, select **Add Note on Student** from the right side navigation.
- Add any text you wish in the large text box.
- Attached a file if desired.
- Select a **Note Reason** on the right.
- Although it appears that you may select to have this note be private so only you see it, when we transfer the note to PS, it will become viewable by any staff with Campus Solutions access. And although it looks like you can select the option for students to see their own note, this option isn't functional in the mobile app. You can then ignore the options under Visibility.

Final word on Navigate Notes

- **It is a campus expectation that ALL advising notes will be recorded in Navigate.** Notes are vital for the continuous care of students as they move among several advising offices and staff. Isn't it a relief when you have a tricky student problem crop up to find that there are clear notes left by the last person who spoke with that student?
- Some general note-keeping guidelines to protect student confidentiality:
  - **Include in notes**: Brief information that will help other staff who interact with the student understand the student's situation and advice that you have 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 staff members.
  - 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.
- Click on the **History** tab at the top of the student's overview page to review Advising Reports and Notes for a student.

Actions from a Search

Generate a list of students based on a number of filters (review from Practice Exercises #1!).

1. Once you have generated a list, click the box next to a student name to select a student OR click the box next to "ALL" to select all students on the list.

2. Then click the drop down arrow beside "Actions" on the left hand side.

3. Explore the available actions to see how each can be used:
   - Send Message (remember that no messages are sent from the training site.)
   - Appointment Campaign
   - Note
   - Others of your choice!

4. Remember to find your Saved Searches using the "bookmark and plus sign" icon on the left navigation bar.