

# NAVIGATE | NOTES & APPOINTMENT SUMMARIES

## Document students' history and inform future interactions.

Using Notes and Appointment Summaries allows advisors and student support staff to better collaborate.

### Benefits to documenting interactions with students

- Builds coordinated care and supports student success.
- Provides a more holistic view of how that student is navigating their college experience.
- Allows for robust reporting on all interactions with your students.

There are two main ways to document a student interaction in Navigate: an Appointment Summary or a General Note. Check out the differences below.

	APPOINTMENT SUMMARY	GENERAL NOTES
Tied to student appointment	✓	✗
Tied to an email exchange	✗	✓
Tied to an impromptu interaction	✗	✓
Can be shared with student	✗	✓
Viewable by all staff and administrators	✓	✓

### Best practices for documenting interactions

Use professional judgement to make a detailed summary of the interaction.

**Include:** facts, professional observations, recommendations made, referrals made to other offices, etc. **Do not include:** opinions, judgements, diagnoses, etc.

### Examples

- ✗ Hates his math professor and threatened to leave the university because of it.
- ✓ Has concerns about his math class and shared that he's considering transferring. Recommended he schedule an appointment with me to talk through options. I also provided tutoring and study buddies as resources to consider.
- ✗ Another death in the family but she seemed fine.
- ✓ Grandfather passed away so will be traveling for funeral. Recommended she connect with instructors to let them know. Also provided reminder of drop deadlines and contact information for Student Support and Accountability.
- ✗ Said she is struggling mentally, but does this every time she takes a hard class.
- ✓ Shared well-being concerns with me. Referred student to CAPS.



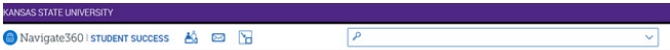
# NAVIGATE | NOTES

## Document emails and impromptu exchanges

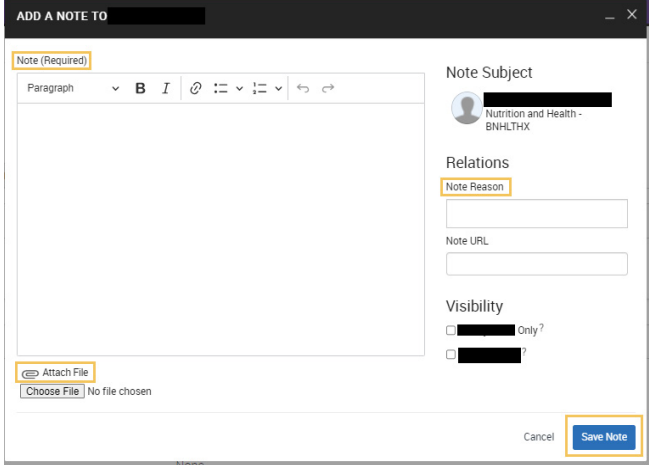
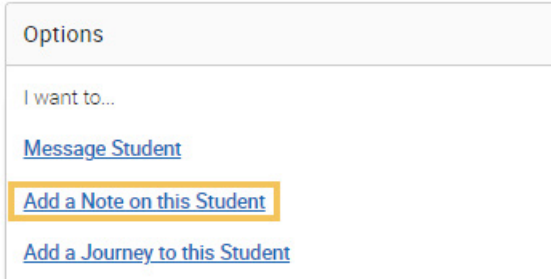
Using Notes in Navigate adds context to the student's history for advisors and campus partners. Notes are used for non-appointment documentation.

### How to add a Note in Navigate

1. Log in to Navigate with your K-State eID and password. To get started, visit [k-state.edu/navigate](http://k-state.edu/navigate) or [k-state.campus.eab.com](http://k-state.campus.eab.com).
2. Type the student's name in the search bar at the top of the screen. If you are assigned as the student's advisor in KSIS, you can also select the student from your list.
3. Click "Add a Note on this Student" from the menu options.
4. Enter Note content and attach files if appropriate. Example files include SAP appeal, late drop appeal form, long range plan, etc.
5. Select a Note Reason, if applicable.
6. Click "Save Note."



3. Click "Add a Note on this Student" from the menu options.



### Visibility

- Notes are viewable by all university staff by default and should be added for others to see.
- To restrict access to only you, click the radial button by your name. **Use this sparingly.**
- To share the Note with the student, click the radial button next to their name.



# NAVIGATE | APPOINTMENT SUMMARY

## Document appointments to build coordinated care

Completing an Appointment Summary in Navigate adds context to the student's history for advisors and campus partners. An Appointment Summary should be filled out after each student appointment.

### How to add an Appointment Summary in Navigate

1. Log in to Navigate with your K-State eID and password. To get started, visit [k-state.edu/navigate](http://k-state.edu/navigate) or [k-state.campus.eab.com](http://k-state.campus.eab.com).
2. Click on the Appointments tab.

Staff Home ▾

Students **Appointments** My Availability Appointment Queues

Upcoming Appointments

3. Click Actions to Add Appointment Summary.

Recent Appointments

Care Unit: All Care Units ▾

Actions		SERVICE	COURSE
<ul style="list-style-type: none"> <li>Add Appointment Summary</li> <li>Mark No-Show</li> <li>Issue Alert</li> </ul>	024	Advising	N/A
	(30m)		

4. Choose Care Unit, Location, and Services(s).
5. Mark whether or not a progress report was discussed in this appointment.
6. Attach file if applicable.
7. Write content.
8. Save This Report.