Navigate: Appointment Reports and Notes

EAB Navigate facilitates a campus-wide student support network by allowing advisors, faculty, and other professionals to share Appointment Summaries and Notes that document relevant information from interactions with students. This facilitates a more personalized, coordinated, efficient, and transparent experience in advising by providing a single accessible repository of communication and meetings.

Why create an Appointment Summary:

- Support comprehensive advising from multiple individuals/departments
- Can remind the advisor of previous discussions with the student
- Document student progress and create an "institutional memory" of contacts and recommendations
- Record data on student use of support services and associated outcomes

What is an Appointment Summary: This is a brief record of advising appointment with student as it relates to student success for future reference by yourself, other staff, and future advisors with information about recommendations, referrals, and follow-up plans. This might include the following:

- Was the student seeking help or advice? What for?
- What steps were taken to address the student's concerns?
- What advice and recommendations were made?
- What follow-up actions were agreed upon? Were specific referrals made?

Why create a Note: This is a brief record of information that was provided to the student, updates to student accounts, or information about a student that does not relate to a specific advising appointment

- Record outcomes of efforts to resolve an issue for the student
- Track communication of important notices to the students
- Record significant information learned outside of an advising appointment (e.g., changes in registration, financial aid, etc.)

What is the difference between an Appointment Summary and a Note?

- Appointment Summary – information about advising appointment and should always be tied to a specific advising encounter between the advisor and student
- Note – information about the student that was gained outside of the appointment, more transactional in nature

Where are these located?

Advising Reports and Notes are visible under the student's **History** tab

How are Appointment Summaries and Notes created?

Advisors can click on the **Report on Appointment** link on the students' page, or reports may be created from the **Appointments** section of the staff home page for scheduled appointments

Who can see these: Advisors and Faculty have permission to see students' advising reports.

> *Any Appointment Summary or Note is considered part of a students' academic record, so the student has the right to subpoena their records under FERPA. Assume students, parents, and the general public will read anything that you have written. When writing notes and reports, consider your scope of practice, and think about creating a descriptive report versus an evaluative one.*

Dos and Don'ts of Advising Reports

Do	Don't
Briefly summarize what was discussed as it relates to student success for future reference by the student, support staff, and advisors	Summarize everything that was discussed.
Recommendations: "Recommend student take M151 over the summer as prereq for M171 in the fall." Advice: "Cautioned against taking 18 credits this semester given work schedule" Referrals: "Referred to Career Services to discuss internship procedures." Action Plans: "Student plans to go to ACE for CHMY tutoring. Will follow up at 40th day."	Unnecessary detail: "She said she has been having a good week and is excited about moving in with friend." Personal/sensitive information: "He disclosed that he has been going to Counseling." Subjective opinions: "Based on what she's saying, it sounds like she is dealing with some depression and anxiety"
Summarize specific course recommendations	Report personal issues with specific instructors
"Encouraged student to take HSTA101" "Recommended student takes ECNS 201 fall 2023"	"Student thinks EGEN attendance policy is unfair" "Student doesn't like his M191 instructor"
Spell things out for a general audience	Use acronyms students and other campus support staff may not understand
"Student's progress toward degree is on track"	"Student is making excellent ptg"
Write fact-based, academic-related notes	Include speculation, subjective opinion, or judgements
"Student is concerned about grade in ECIV course" "Student is considering whether current major is a good fit. We reviewed other options" "Student needs to complete remaining pre-nursing requirements with B+ or higher for Nursing GPA requirements"	"I don't think he is very motivated this semester" "Her personality isn't a good fit for our department. I think she'd feel more at home in one of the other majors." "He has probably been avoiding CHMY141 because he didn't take Chem in high school."
Use general or coded language concerning sensitive material	Include sensitive information, personal concerns, or private matters
"Student reported *extenuating circumstances* related to his academic progress this semester." "She discussed a *difficult situation* and requested help from a campus support service" "Student disclosed a *health situation* that is having an impact on how things are going this semester"	"Student's parents are going through a divorce" "She reported that she was assaulted by her boyfriend earlier this year" "Student was recently diagnosed with an autoimmune disorder"
Record referrals made and resources shared	Report details surrounding sensitive referrals
"Shared information about Wellness and Counseling" "Referred to Financial Aid for more information" "Discussed resources at Student Health Center"	"She said she can't concentrate because she feels overwhelmed by the stress of school and family." "Little financial support from family and has quite a lot of debt building up" "She said she has been having a lot of headaches, and I am concerned something serious may be going on. Encouraged her to get it checked out."
Include notes about positive student behaviors	Include negative judgements about student behaviors
"Student came prepared for session with course grid filled out for next semester." "She has spent time speaking with Metallurgy faculty to learn more about possibly switching to that major."	"She seems like she blows off advising appointments. I can't get her to be serious and plan ahead." "He seems pretty uninformed about the real world after college and hasn't followed through with meeting with Career Services. I think he needs to be more realistic."

Adapted from Rutgers University's Navigate Guides Template