

Appointment Summary Report

The Appointment Summary Report function in EAB Navigate allows for an integrated campus-wide advising notes sharing system. These notes may be available to other advisors, staff, faculty, and even the student themselves. As such, it is crucial to keep the audience in mind as you craft your notes.

Benefits of Appointment Summaries

Advisors are encouraged to document advising interactions in the Appointment Summary Report to improve communication, coordination, efficiency, transparency, and a more personalized student advising experience.

Why make appointment summaries?

- Enhances campus advising services to students
- Facilitates sharing of advising information across campus
- Improves advisor effectiveness and institution integrity
- Helps facilitate the student/advisor relationship and provides continuity and consistency to the student's advising experience
- Helps students remember advice they received during advising
- Personalizes the advising experiences by refreshing the advisor's recollection of previous conversations

The content of appointment summaries aims to communicate:

- What was the student seeking help with?
- What steps were taken to address the student's concern?
- What advice and recommendations were made?
- What are agreed upon follow-up actions? Were referrals made?
- Overall, summarize what was discussed as it relates to the student's academic success

Important to Keep in Mind

- ✓ Reports cannot be erased or updated once submitted
- ✓ All Appointment Summary Reports entered under this system are considered part of the student's permanent educational record and are accessible by students, open records requests, and court subpoenas. Be aware that the student or other relevant parties may file a request and be allowed to view all notes in their record.
- ✓ Inform the student that you will be making an advising-related note in the student's record. This allows for advisors across campus to best help the student with advising needs.
- ✓ When writing a summary, ask yourself the following questions:
 - Is this something the student would want other people to know?
 - Is this something another advisor would need to know? Why?
 - Are the details in my notes based on facts or do they merely represent my own observations, perspectives, guesses, predictions, diagnoses, etc.
- ✓ **Notes should be academic-related and avoid including personal, potentially sensitive content.** Personal and/or sensitive content, whether reported by the student or assumed by you, may include:
 - Medical/mental health concerns
 - Legal problems
 - Relationship problems
 - Family concerns
 - Conflicts with specific people

Recommendations for Appointment Summary Reports

DO	DON'T
<p>Briefly summarize what was discussed as it relates to student success for future reference by the student or advisors.</p>	<p>Summarize everything that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals, and follow-up plans.</p>
<ul style="list-style-type: none"> ✓ Recommendations: “Recommended student to take Math/DS 110 because of their interest in pursuing a Business major.” ✓ Advice: “Cautioned against taking 18 units this semester while also working full-time.” ✓ Referrals: “Student should declare the major with department as soon as possible.” ✓ Action Plans: “Student will schedule another appointment after the class schedule becomes available.” 	<ul style="list-style-type: none"> • Include unnecessary details: “Student said they have been having a good week and is especially excited about moving into a different apartment.” • Include personal/sensitive information (see examples below). • Include subjective opinions (see examples below).
<p>Summarize specific course recommendations</p>	<p>Report problems with specific instructors</p>
<ul style="list-style-type: none"> ✓ “Encouraged student to take IR 104 as a general education course and to further explore the IR major.” ✓ Recommended student to take a GE C2 course that also satisfies the AERM requirement. 	<ul style="list-style-type: none"> • “Student doesn’t like their BIOL instructor.” • “Student said their PSYCH professor has a strict attendance policy.”
<p>Write fact-based academic-related notes</p>	<p>Include speculation, subjective opinions, or judgments</p>
<ul style="list-style-type: none"> ✓ “Student is concerned about progress in English course. We discussed tutoring & support services.” ✓ “Student is considering whether their current major is a good fit. Discussed related major options that match their strengths.” ✓ “Student needs to complete pre-requisite courses for KIN major in order to declare.” 	<ul style="list-style-type: none"> • “I don’t think the student is completely focused on their academics this semester.” • “The student’s personality is not a good fit for Engineering. I think they would do better in the Criminal Justice major.” • “The student has probably been avoiding UD-B because they struggled in B1 and B2.”
<p>Use general language concerning sensitive material</p>	<p>Include sensitive information, personal concerns, private matters</p>
<ul style="list-style-type: none"> ✓ “Student reported extenuating circumstances related to their academic progress this semester. Discussed the withdrawal petition process.” ✓ “Student wanted to learn more about campus resources. We discussed various support programs.” 	<ul style="list-style-type: none"> • “Student’s parents are going through a divorce.” • “She was recently diagnosed with depression.” • “Student is unsure about their ability to do really well this semester because they are more invested in their internship.”
<p>Record referrals made</p>	<p>Report details surrounding sensitive referrals</p>
<ul style="list-style-type: none"> ✓ “Referred to major department to discuss impaction, applying, and major requirements.” ✓ “Referred to Undergraduate Advising Center to discuss outstanding GE and non-major graduation requirements.” ✓ “Referred to campus tutoring for support.” ✓ “Referred to on-campus support services for additional support.” ✓ “Student is planning to transfer to another university. Advised to connect with the Admissions Office at the university of interest.” 	<ul style="list-style-type: none"> • “The student said they cannot concentrate because of relationship problems with their partner. I referred the student to Counseling and Psychological Services.” • “The student said they have been having a lot of headaches lately. I am concerned something more serious may be going on. I suggested the student go to Student Health Services to get it checked out.” • “Little financial support from family. First generation student with significant financial debt.” • “Student reported having a lot of test anxiety.”

Portions are summarized or directly adapted from: *Adopting a Campus-Wide Student Notes System*. www.eab.com