

## Best Practices: Navigate LA Advising Summary Reports and Notes

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The Navigate LA platform allows for an integrated campus-wide advising summary reports and notes system. All advising interactions will be recorded on Navigate LA under an advising summary report to capture the advising session as it relates to the student’s academic success. This will lead to improved communication, and effective/efficient coordination among campus professional advisors, faculty advisors, and students.

This guide outlines the purpose of advising summary reports and notes on Navigate LA. It also provides specific tips and examples that advisors may use when documenting information in Navigate LA.

ADVISING SUMMARY REPORT	“Navigate LA” NOTES
<p><b>Why:</b> <i>Why document an Advising Summary Report on Navigate LA?</i></p> <ul style="list-style-type: none"> <li>To record the logistical details associated with an advising exchange/interaction, including attachments relevant to the session.</li> <li>Effectively communicate among professional and faculty advisors to personalize the advising experience for future advising follow-up.</li> </ul>	<p><b>Why:</b> <i>Why document Notes on Navigate LA?</i></p> <ul style="list-style-type: none"> <li>To provide an easy reference to documentation (e.g., a curriculum roadmap, personal/academic/professional goals).</li> <li>Interaction concerning student, but not with the student directly.</li> </ul>
<p><b>Communication Content:</b> <i>The content of a Navigate LA Advising Summary Report aims to communicate...</i></p> <ul style="list-style-type: none"> <li>A summary of the communication exchange (in-person, virtual, phone or email) during the advising session as it relates to the <u>student’s academic success</u>.</li> <li>What was the student’s concern(s) or what was the student seeking help with?</li> <li>What steps were taken to address the student’s concerns?</li> <li>What advice and recommendations were made?</li> <li>What are agreed upon follow-up actions?</li> <li>Were specific referrals made?</li> </ul>	<p><b>Communication Content:</b> <i>The content of Navigate LA notes aims to communicate...</i></p> <ul style="list-style-type: none"> <li>Information not associated with an advising exchange/interaction.</li> </ul>
<p><b>Audience:</b> <i>Who can see the Navigate LA Advising Summary Report?</i></p> <ul style="list-style-type: none"> <li>Advising Reports can be viewed by the advisor who enters the report and other campus advisors who have access to the student’s profile.</li> </ul>	<p><b>Audience:</b> <i>Who can see the Navigate LA Notes?</i></p> <ul style="list-style-type: none"> <li>Navigate LA notes can be viewed by <i>EVERYONE</i> including the student or just the Advisor.</li> </ul>



## Family Educational Rights and Privacy Act (FERPA)

The Family Educational Rights and Privacy Act (FERPA) entitles students to access any notes considered part of their academic record. Any notes completed in the Navigate LA platform are considered part of a student’s academic record and are accessible by students, open records requests, and court subpoenas. This applies to notes, whether they are designated as shared with students in the platform or not.

### Things to ask yourself when writing a Navigate LA Advising Summary Report...

- Is this something the student would want other people to know?
- Is this something another advisor would need to know? Why?
- Is this something that is within my scope of practice to say? (i.e., Do I have the necessary training, and is this something related to my area of professional expertise?)
- Are the details in my report based on fact?

### Things to ask yourself when writing Navigate LA Notes...

- Are these notes associated with an advising exchange/interaction? If so, this information should be included in the Advising Summary Report and NOT under Navigate LA notes.

### Tips for Writing Advising Summary Reports:

- Describe, don’t evaluate.
- When in doubt, leave it out.
- Use them, their, they pronouns if you haven’t asked for their pronouns.
- The report summary should be academic- related.
- Avoid including personal potentially sensitive content, such as:
  - Medical/mental health concerns
  - Legal problems
  - Relationship problems
  - Family concerns
  - Conflicts with specific instructors

### Tips for Writing Navigate LA Notes:

- Include information not associated with an advising exchange/interaction such as:
  - Attachments requested by students such as curriculum sheets, roadmaps, and forms
  - Event flyers
  - Campus Resource Information
  - Student Organization Contact Information



SAMPLE ADVISING REPORTS: DO's AND DON'Ts	
DO	DON'T
<p>Briefly summarize what was discussed as it relates to the student's academic success for future reference by professional advisors, student, faculty advisors, and other support staff.</p>	<p>Summarize everything that was discussed. An Advising Summary Report is intended to be a brief record of the advising interaction highlighting recommendations.</p>
<p><b>Sensitive and/or personal Information:</b></p> <ul style="list-style-type: none"> <li>Referred student to a student support service for additional support.</li> </ul>	<p><b>Sensitive and/or personal Information:</b></p> <ul style="list-style-type: none"> <li>Recommended student to seek psychological assistance through Counseling and Psychological Services (CAPS) on campus. I suspect depression.</li> <li>Referred student to the Office for Students with Disabilities (OSD). I suspect a learning disability.</li> <li>Asked student to confer with Mr. Y about difficulty getting accommodations for visual disability.</li> <li>Student will see University Police about being stalked by ex-girlfriend.</li> </ul>
<p><b>Judgements:</b></p> <ul style="list-style-type: none"> <li>Student is concerned about grades in two courses.</li> <li>Student is considering whether their current major is a good fit. I helped them consider their options.</li> <li>Student needs to complete BIO XXXX before they can apply for their major.</li> </ul>	<p><b>Judgements:</b></p> <ul style="list-style-type: none"> <li>Student is not motivated to succeed in classes this semester.</li> <li>Student is struggling. I think he would have been better off at a community college.</li> <li>I doubt student's ability to succeed in this major.</li> </ul>
<p><b>Student Instructors:</b></p> <ul style="list-style-type: none"> <li>Encouraged student to take ENGL XXXX.</li> <li>Recommended to take Math XXXX.</li> </ul>	<p><b>Student instructors:</b></p> <ul style="list-style-type: none"> <li>Student is having a personality conflict with his English instructor.</li> <li>Student is considering dropping Math XXXX because of a problem with the professor.</li> <li>Student indicated that she is considering filing a sexual harassment charge against her Political Science professor.</li> </ul>



SAMPLE ADVISING REPORTS: DO'S AND DON'Ts	
<p><b>Personal Concerns:</b></p> <ul style="list-style-type: none"> <li>• Student reported extenuating circumstances related to their academic progress this semester.</li> <li>• Student discussed a difficult situation and requested help from a campus support service.</li> <li>• Student disclosed a personal situation that's having an impact on how things are going this semester.</li> </ul>	<p><b>Personal Concerns:</b></p> <ul style="list-style-type: none"> <li>• Parents are going through a divorce.</li> <li>• Student was assaulted earlier this academic year.</li> <li>• Sister has cancer; student is having a very difficult time staying focused on academics.</li> <li>• Student must go to court next week; will miss classes.</li> <li>• Student shared problems she is having with motivation and time management.</li> </ul>
<p><b>Referrals:</b></p> <ul style="list-style-type: none"> <li>• Referred student to a student support service office.</li> <li>• Referred student to Financial Aid Office.</li> <li>• Referred student to Center for Academic Success - CAS</li> </ul>	<p><b>Referrals:</b></p> <ul style="list-style-type: none"> <li>• Referred student to OSD.</li> <li>• Referred student to CAPS.</li> <li>• Referred student to Health Center.</li> </ul>
<p><b>Attachments:</b></p> <ul style="list-style-type: none"> <li>• Attach important documents discussed.</li> </ul>	<p><b>Attachments:</b></p> <ul style="list-style-type: none"> <li>• Do not attach emails with sensitive/private content.</li> </ul>
<p><b>Emails:</b></p> <ul style="list-style-type: none"> <li>• Document an email exchange between student and advisor demonstrating the advisors' recommendations and referrals.</li> </ul>	<p><b>Emails:</b></p> <ul style="list-style-type: none"> <li>• Do not record "one-way" emails from the advisor. Do not copy &amp; paste information in the email that contains sensitive or personal information.</li> </ul>



### SAMPLES: ADVISING SUMMARY REPORT & "Navigate LA" NOTES

#### Sample Advising Summary Report

1. Worked together on an educational plan for 2017-2018. Student was seeking help concerning tutoring for ENGL XXXX. Student was referred to the writing center. Student requested for the educational plan discussed to be added to the Navigate LA Notes for easy access.
2. Student came in to discuss schedule for Spring 2018. They expressed concerns regarding successfully completing Math XXXX and their major. We explored two majors that they may want to consider, and I referred them to the tutorial center to get help with math as well as the career center for additional major exploration.
3. Student came in to specifically discuss a personal situation that is impacting how things are going this semester. I referred the student to a student support service for additional support.

#### Sample Navigate LA Notes

1. Educational Plan discussed attached.
2. Helped with Spring 2018 schedule
3. (Notes not entered)