

Advising Summary Reports – Best Practice Recommendations

January 2019

Recommendations for Writing Summary Reports in Navigate

- Write reports as soon after the appointment as you are able – within 24 hours is best.
- Include information that will help you to recall the conversation at a later time.
- Include any referrals to campus offices, staff/faculty, or resources.
- Do NOT include any information that you would not want the student to read
- Encourage students to take responsibility for taking their own notes during the meeting.

Sample Summary Report Entries

- *Met with James today to discuss possible change of major to Finance. We reviewed requirements, as well as his grades so far in related courses. He plans to take ECON 103 and MATH 221 in Spring 2019 before making the change.*
- *Alicia made an appointment for today to discuss her struggle with MATH 241. She is feeling very nervous about her ability to raise her grade. We reviewed her grades so far and discussed tutoring options. We made plans to meet again in two weeks, so that she can review her progress. She understands that after 10/31, she can no longer make adjustments to her enrollment or grading status.*

Purpose of Advising Summary Reports

Advising Summary Reports help advisors maintain an accurate record of advising, referrals, and recommendations. Summary reports, including those entered in online platforms, become a part of the students' academic record. Advisors should ensure that report notes are complete, professional, and able to be reviewed by the student, other assigned advisors, and/or other campus professionals, as required. Report details entered into the system should be brief, academically-focused, and understandable when read individually. Below are examples of what to include and not to include in a summary report.

Information to include, with examples:

1. Lists of **approved courses**, along with alternative options.

Example: *During registration advising, the student agreed to enroll in the following for Fall 2019: ENGL 110, MATH 241, PSYC 100, ECON 101. If student is unable to enroll in ECON 101, she will look for an elective.*

2. **Action items and reminders** for student; as well as **administrative information** for your record keeping.

Example: *Asked student to prepare list of alternate majors and possible courses for registration advising appointment; Student missed scheduled appointment on 10/25/2018.*

3. Possible **consequences** of not following the given advice.

Example: *Discussed the need for student to earn a 2.0 GPA this semester to avoid being placed on academic trial; Cautioned student against taking 18 credit hours while working.*

4. Report details that will help the **advisor recall** specific advising information, or **help future advisors** or other advisors working with the student understand the student or advice that was provided.

Example: Student is taking MUSC 185 due to her desired minor in Music.

Student decided to retake MATH 241. Although they have AP credit for MATH 241, they would feel more comfortable taking the course at UVM before moving on to MATH 242.

5. **Referrals** to other campus resources

Example: Referred student to meet with the Director of Undergraduate Programs in the Department of Communication to discuss their competitiveness to enter the program.

Referred student to Student Accessibility Services (SAS) to discuss possible accommodations.

6. **Comments that help you in future interactions** with student (e.g., creating reference letters for students)

Example: Student has expressed interest in becoming a physical therapist. Shared that they are the new president of Pre-Health Club; Student indicated they are doing a summer internship.

7. Summaries of **emails from referred parties** (irrelevant to academics)

Example: Received email from Jasmine Adams regarding enrollment approval in CISC 108 for Fall 19.

Information NOT to include, with examples:

1. **Personal judgments or editorial comments** about the student, especially when negative.

DO NOT WRITE: Student is not strong in math or sciences, but wants Biomedical Engineering. This will never happen!

DO WRITE: Encouraged student to continue career and major exploration process due to grades in math and science.

2. Comments regarding student's **instructors**, especially when negative.

DO NOT WRITE: Student is planning to drop ENGL 110, because she is not partial to instructor's teaching style.

DO WRITE: Discussed different teaching and learning styles and effective strategies for ENGL 110.

3. Details about a student's **diagnosis or possible diagnosis**.

DO NOT WRITE: Student told me he has bipolar disorder and will be out of school having treatments.

DO WRITE: Taking grades of "I" for Fall 2018 courses due to medical issue.

4. Details about student's **personal hardships** or concerns.

DO NOT WRITE: Student feeling upset about breaking up with long-time girlfriend.

DO WRITE: Student discussed personal challenges. Referred student to Counseling and Psychiatry Services.