

Navigate360: Appointment Summaries Best Practices

Best practices and examples for writing Appointment Summaries in Navigate360

Why Write Summaries in Navigate360?

- Personalize advising experiences and foster rapport with students with a quick review of previous meetings (recommendations, goals, plans, concerns) and picking up where you left off
- Increase consistent service and reduce conflicting advice or redundancies across offices
- Limit students’ forgetting or misremembering advising sessions
- Create ‘institutional memory’ of contacts and recommendations to get the next advisor up to speed quickly
- Reduce clutter in DegreeWorks notes for colleagues in Financial Aid, Registrar, and others
- Provide documentation in the event of future dispute of advice given

General Guidelines

- Write appointment summaries as soon as possible (details and memory)
- Write appointment summaries as if the student, parents, or the general public will read them
- Be brief and succinct but be specific and include key details. Use bullet points or lists as needed.
- Document objective facts and observed behavior rather than opinions, guesses, judgements, or feelings. Describe, do not evaluate.
- Always include the specific courses in which the student was advised to register. Use bullet points, lists, copy/paste from Degree Works plan, or add as an attachment.
- Parts or all post-appointment emails to students can be copied and pasted as summaries for efficiency, but not all emails need to be added as notes or summaries. If copying/pasting an email, provide a brief summarization at the top of the note.
- Create advising summaries which are academic-related, but omit personal or sensitive content
- Due to system data-storage limitations, images or tables that are copied/pasted directly into the summary text may not remain accessible over time and can later appear as broken or inaccessible image icons. For long-term image & table storage, it is recommended to upload as an attachment.

What to Include and Examples

INCLUDE	EXAMPLES
Recommendations, advice, referrals and action plans discussed for student success	<ul style="list-style-type: none"> ✓ Student should take math placement exam by mm/dd/yyyy. ✓ Advised student to send transcripts to Admissions by mm/dd/yyyy.
Notes to help future advisors understand the advice given to the student	<ul style="list-style-type: none"> ✓ Explained gen ed courses and licensure requirements for ELEM ed students. ✓ Discussed articulation between community college and ETSU for summer coursework. ✓ Will take 12 credit hours in Spring to play sport and take course(s) in summer to stay on track with prereqs.
Fact-based academic-related information shared by the student	<ul style="list-style-type: none"> ✓ Student concerned about grades in two courses. ✓ Student considering three minors – Environmental Studies, Gen Business, or Linguistics. Provided course catalog links and contacts for minor advisors.
List of approved courses and alternatives	<ul style="list-style-type: none"> ✓ Student agreed to 15 credit hours in Spring: ENGL 1020, HIST 2020, CSCI 1100, SPAN 1020, ANTH 1240. May take HDAL 2340, ECON 1050, or PSCI 1100 as alternative Soc/Behav or Nat Sci.
Student/Advisor relationship building notes/reminders	<ul style="list-style-type: none"> ✓ Student should make advising appointment early next semester. ✓ Asked student to make an appointment after midterm grades are posted.

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	<ul style="list-style-type: none"> ✓ Congratulated student on hard work and excellent grades over summer.
Possible consequences of not following advice	<ul style="list-style-type: none"> ✓ Discussed off sequence graduation if MATH is delayed past Spring. ✓ Notified student that final requirements must be taken in Summer to apply to program in Fall.
Referrals to campus resources	<ul style="list-style-type: none"> ✓ Advised student to speak with career advisor about resume for internship. ✓ Recommended speaking with Dr. Smith about graduate school. ✓ Referred student to veteran’s affairs to discuss VA benefits. ✓ Student asked about tutoring. Discussed CFAA and TRiO as options. ✓ Student noted a difficult situation and asked about campus resources
Positive student behaviors	<ul style="list-style-type: none"> ✓ Student came to meeting with tentative schedule mapped out based on DegreeWorks grad plan.

What to Exclude and Examples

EXCLUDE	EXAMPLES
Details about sensitive or personal referrals (health, disability, etc.)	<ul style="list-style-type: none"> × Sent student to Dean of Students for stalking incident. × Recommend Counseling Center for depression. × Advised student of resources available at Disability Services.
Details about other personal or sensitive concerns the student has (legal, relationship, family)	<ul style="list-style-type: none"> × Parents are divorcing and student is having trouble focusing × Sister has cancer and is driving home every weekend to help family with chores and money × Student missed classes because of going to court for DUI
Student’s comments about faculty, instructors, professors	<ul style="list-style-type: none"> × Student is considering dropping COMM 2025 because of a problem with the professor × Student is considering filing grievance against PSYC 1310 professor × Student might drop CSCI 1110 due to language barrier with instructor
Subjective opinion or judgement or negative student behavior	<ul style="list-style-type: none"> × Student doesn’t seem serious and probably will not persist in major × Student should have gone to community college – doesn’t seem ready for college.

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 Navigate360 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 & Appointment Summaries whether they are designated as shared with students in the platform or not.