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
Why: *Why document an Advising Summary Report on Navigate LA?* • To record the logistical details associated with an advising exchange/interaction, including attachments relevant to the session. • Effectively communicate among professional and faculty advisors to personalize the advising experience for future advising follow-up.	Why: *Why document Notes on Navigate LA?* • To provide an easy reference to documentation (e.g., a curriculum roadmap, personal/academic/professional goals). • To share academic documentation with student, while being saved on the Navigate LA platform.
Communication Content: *The content of a Navigate LA Advising Summary Report aims to communicate…* • A summary of the communication exchange (in-person, virtual, phone or email) during the advising session as it relates to the student's academic success. • What was the student's concern(s) or what was the student seeking help with? • What steps were taken to address the student's concerns? • What advice and recommendations were made? • What are agreed upon follow-up actions? • Were specific referrals made?	Communication Content: *The content of Navigate LA notes aims to communicate...* • Information not associated with an advising exchange/interaction.
Audience: *Who can see the Navigate LA Advising Summary Report?* • Advising Reports can be viewed by the advisor who enters the report and other campus advisors who have access to the student's profile.	Audience: *Who can see the Navigate LA Notes?* • Navigate LA notes can be viewed by *EVERYONE* including the student, not just the Advisor.

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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:
 	
• Be objective.
• 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

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SAMPLE ADVISING REPORTS: DO's AND DON'Ts	
DO 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.	**DON'T** Transcribe everything that was discussed.
Sensitive and/or personal Information: • Referred student to a student support service for additional support.	Sensitive and/or personal Information: • Recommend student to seek psychological assistance through Counseling and Psychological Services (CAPS) on campus. I suspect depression. • Referred student to the Office for Students with Disabilities (OSD) about difficulty getting accommodations for visual disability. • Student will see University Police about being stalked by ex-girlfriend.
Student self-reports vs Judgments: • Student expressed concerned about grades in two courses. • Student is weighing whether their current major is a good fit. We reviewed various majors and requirements and career exploration. They expressed interest in Sociology. • Student is aware they must repeat BIO XXXX and earn a X grade by end of Spring 26 to graduate.	Student self-reports vs Judgments: • I think the student is not motivated to succeed in classes this semester. • Student is struggling. I think he would have been better off at a community college. • I doubt student's ability to succeed in this major.
Academic Grievance: • Students expressed concerns around their class experience, informed student about the academic grievance process.	Academic Grievance: • Student is having a personality conflict with her instructor, and she is considering filing a Title IX harassment charge against her Political Science professor.
Personal Concerns: • Student reported extenuating circumstances related to their academic progress this semester. • Student discussed a difficult situation and requested help from a campus support service. • Student disclosed a personal situation that's having an impact on how things are going this semester.	Personal Concerns: • Parents are going through a divorce. • Student was assaulted earlier this academic year. • Sister has cancer; student is having a very difficult time staying focused on academics. • Student must go to court next week; will miss classes.

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SAMPLE ADVISING REPORTS: DO's AND DON'Ts	
Referrals: • Referred student to a student support service office. • Referred student to Financial Aid Office. • Referred student to Center for Academic Success – CAS.	Referrals: • Referred student to OSD. • Referred student to CAPS. • Referred student to Health Center.
Attachments and Emails: • Attach important documents discussed. • Document an email exchange between student and advisor demonstrating the advisors' recommendations and referrals.	Attachments and Emails: • Do not attach documents or copy/paste emails with sensitive/private content. • Do not record "one-way" emails from the advisor.

SAMPLES: ADVISING SUMMARY REPORT & "Navigate LA" NOTES	
Sample Advising Summary Report 1. Worked together on an educational plan for 2024- 2025. 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. California Promise Student came in to discuss schedule for Spring 2025. They expressed concerns regarding successfully completing Math XXXX and their major. We explored the CAP Requirements, and I referred them to the tutorial center to get help with math. 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 services for additional support.	Sample Navigate LA Notes 1. Educational Plan discussed attached. 2. Sent California Promise info to student. 3. (Notes not entered)