

Guidelines for Advising Reports

in



NAVIGATE

QUICK TIPS

BE BRIEF BUT DESCRIPTIVE

- Timely, purposeful advising reports document student interactions and provide context and history for tracking student progression toward their academic, personal, and career goals.
- Advising reports also represent an expedient and secure way to share critical information that can be used to inform, assist, and maximize future student advising contacts.

FERPA

FAMILY EDUCATION RIGHTS AND PRIVACY ACT OF 1974

As with any document containing a student's personally identifiable information, Navigate advising reports are part of a student's education records and are subject to FERPA. Please visit [HERE](#) for more information.

USE OBJECTIVE WRITING

MAINTAIN APPROPRIATE LEVELS OF DISCLOSURE

- Fact-based, descriptive notes convey the unique dynamics of each student advising contact.
- Narrative notes are encouraged for readability and nuanced circumstances, but bulleted summaries can also be effective.
- Exercise care when recording information, conversations, or referrals of a highly personal or sensitive nature. Do not diagnose, assess, or offer personal judgement about the student or their circumstance.

BEST PRACTICES

KEEP NOTES BRIEF & SUCCINCT

- Be specific when describing what was discussed and agreed upon between you and the student.
- Include general information about the student.
- Record all courses you recommend the student take (and why, if appropriate).
- Note all referrals that were made.

**CLICK HERE TO VIEW EXAMPLES OF
SUCCESSFUL ADVISING REPORTS**