



Guidelines for Advising Notes in RunnerConnect (Navigate)

The Appointment Summary Report in RunnerConnect is used to document your student interactions (phone, email, appointment).

The screenshot shows the 'Appointment Summary' form in RunnerConnect. The form is divided into two main sections: 'Appointment Details' and 'Appointment Summary'. The 'Appointment Details' section includes fields for Appointment, Appointment Campaign, Care Unit, Location, Service, Course, Meeting Type, Date of visit, Meeting Start Time, and Meeting End Time. The 'Appointment Summary' section includes fields for Student Supports Discussed, Referrals Made, Session Objectives, Follow-ups Needed, and a list of checkboxes for student status (e.g., Student Arrived on Time Ready to Start the Session, Student brought necessary documents, Student enrolled in 15+ units in current term, Student on track to complete 2/4 year graduation). The 'Appointment Summary' section also includes a rich text editor for notes. The 'Appointment Details' section is highlighted with a blue circle, the 'Appointment Summary' section is highlighted with a yellow circle, the 'Course' field is highlighted with an orange circle, the 'Meeting Type' field is highlighted with a green circle, and the 'Attendees' field is highlighted with a blue circle.

Appointment Details auto-fills all boxes except **Course** (unless appointment was made for a specific course) and **Meeting Type** if the student made an appointment through RunnerConnect and you document the Appointment Summary through the Upcoming Appointments tab. If you document a student interaction through the Report on Appointment link on a student's RunnerConnect page, you will need to fill in the Appointment Details.

Course: interaction/meetings can be associated with a course. This area does not autofill until the student has made an appointment for a meeting about a specific class (this would be set up in the

faculty's Availability). To associate the interaction/meeting with a course you can start typing in the course (i.e. SOC 2018) and a list will pop up that provides you classes to choose from.

Meeting Type: Allows you to indicate if the student interactions/meeting was In-person, by Phone, or Online.

Attendees: The student(s) and Organizer (staff/faculty making the report) will populate in this area. If you are documenting a group session and 1 or more of the group didn't attend, you can uncheck the box next to their name and their History page will show them as a No-Show to the appointment.

Student Supports Discussed, Referrals Made, Session Objectives, and Follow-ups Needed: These are open text boxes and text is not required, however, documentation in these areas can be helpful to future meetings and/or in comparing your entire advisee group. Below the text boxes are radial buttons that you can choose to click to provide more details about your interaction/meeting.

Appointment Summary: This is an open text box for you to document your interaction/meeting details.

Reasons to create an Appointment Summary:

1. As a reminder of the student interaction for future interactions by yourself or another student success staff/faculty
2. Help other campus staff provide consistent communication
3. Record valuable information on a student's use of campus support services, referrals made by staff/faculty, and student preparedness

Benefits of creating an Appointment Summary

1. Support students by providing continuity and consistency in advising
2. Build student trust by showing them you remember details of your last meeting

When documenting in Appointment Summary:

1. Documentation must be kept in accordance to FERPA guidelines:
<https://www.csub.edu/registrar/confidentiality-and-privacy-rights>
2. Record detailed information about the appointment/interaction with the student that you or another faculty/staff member would need to know or find helpful in future appointments
 - a. Synopsis of advising session/interaction
 - b. Reason for student seeking help
 - c. How student's concern/need was addressed
 - d. Resource and/or referral recommendations made
 - e. Student's goals
 - f. Whether the student is on track for a 4-year graduation
 - g. Agreed follow-up actions/milestones
 - h. Items pertaining to CSUB/CSU policies
3. The documentation is viewable to all staff/faculty within your CareUnit (i.e. Advising, Tutoring, Financial, etc).
 - a. Is your documentation something that other campus support personnel need to know

4. Make your documentation fact based and descriptive
 - a. Avoid violating the student's right to privacy by not detailing personal facts such as
 - i. Mental health/wellness details
 - ii. Citizenship status
 - iii. Legal or financial problems
 - iv. Relationship problems and family issues
 - v. Student's opinions about professors/classes/assignments etc
5. Exclude the following when documenting:
 - a. Personal facts
 - b. Opinions, judgements about the student
 - c. Comments about another staff/faculty
 - d. Student's health or disability
 - e. Student opinions on a particular course, staff/faculty member, or other student

Items to remember when documenting in RunnerConnect:

1. Students cannot view the documentation but can request them. Documentation can also be subpoenaed by third parties under FERPA guidelines.
2. You can keep notes in a separate, properly protected personal file if there is something you need to remember, but do not want to include it in RunnerConnect. These notes can also be requested by students and/or subpoenaed by third parties under FERPA guidelines.

Documentation Guideline Examples:

1. Include notes that will help the student
 - "Student should remember to take the Calculus Placement exam before registering for fall semester."
 - "Asked student to bring a list of possible course electives for next semester to our next meeting."
 - "Reminded student to send College Board scores in to Records office ASAP"
 - "Discussed importance of retaking CRJU1008 next semester and impact on GPA."
 - "Student missed scheduled meeting. Sent them a message indicating they need to reschedule an appointment as soon as possible to avoid registration delay."
2. Include notes that will help future advisors understand the student or the advice that you gave.

- “Encouraged student to enroll in Math2120 because of interest in teaching career.”
 - “Explained general education courses and thematic minor to student.”
 - “Student intends to transfer to UCLA. Plans to take engineering prerequisite courses at CSUB.”
3. Include list of courses approved, along with alternatives.
- “We agreed to the following 15 units for spring semester: PSYC 2030, HIST 1228, PSYC2230 or 3210 or 3220, PSYC 3110, and a GE Area D.”
 - “Summer classes we discussed were Math2510 and BIOL2010 for 8 units. Will take CHEM2300 if one of the previous courses fills up.”
4. Include notes that will facilitate the relationship with the student.
- “Encouraged student to make an appointment to come see me after mid-term grades are posted.”
 - “Reminded student to make an advising appointment well in advance of their enrollment date.”
 - “We agreed to meet once a month during the spring semester to monitor their academic progress.”
 - “Commended student for their excellent grades last semester.”
5. Include possible consequences of not following advice given.
- “Discussed need to retake Math2200 in spring semester because it is a prerequisite for their 2nd year major courses and that they would not be able to register in 2nd year courses without passing Math2200.”
 - “Student wants to enroll in 18 units next term. I cautioned them against such a heavy academic load because their GPA is below 3.0. Emphasized that the higher academic load could further impact their GPA.”
 - “Reminded student that they must pass at least 13 units this term in order to retain scholarship.”
6. Include referrals of a non-sensitive nature

- “Encouraged student to visit tutoring to improve English grade.”
 - “Recommended student meet with CECE advisor to discuss the 2 internship opportunities they applied for on Handshake.”
 - “Student is interested in joining Sensational Sophomores. I referred them to Student Programming office to learn more about the program.”
 - “Recommended that the student contact the Veteran’s Student Center to discuss their Veteran’s benefits.”
 - “Student stated they have a diagnosed learning disability. I referred them to SSD office.”
 - “Recommended student seek assistance through the Counseling Center.”
7. Include comments that help you in future interactions with the student. (Perhaps in helping with reference letters or scholarship applications.)
- “Student was well prepared for advising session with a schedule already planned out.”
 - “Student has consistently expressed an interest in attending dental school. Recently, they took on the role of Dental Club Treasurer.”
8. Exclude subjective judgments about the student, especially when they are negative.
- “Student is not motivated to success in classes this semester.”
 - “Student is struggling in al classes. I think he would have been better served at a community college.”
 - “I doubt student’s ability to succeed in this major.”
9. Exclude referrals of a sensitive or personal nature.
- “Student saw a counselor at the Counseling Center and I suggested they continue to do so.”
 - “Referred student back to their SSD counselor to work out accommodations.”
 - “Student will meet with the Title IX Coordinator about experiences of being stalked.”

- “Student will meet with Student’s Rights and Responsibilities to discuss their conduct violation for drinking on campus.”

10. Exclude comments regarding student’s instructors, especially when they are negative.

- “Student is having a personality conflict with their COMM1008 instructor.”
- “Student is considering dropping PHIL1018 because they do not like the way the professor’s teaching style.”
- “Student indicated that they are considering dropping their MATH1060 course because they believe their teacher is rude.”

11. Exclude personal concerns of the student.

- “Student’s parents are divorcing this summer.”
- “Student was sexually assaulted earlier this year.”
- “Sister has cancer. Student is having a very difficult time staying focused on academics.”
- “Student has to go to court with next week for DWI; will miss classes.”