

CAL STATE EAST BAY

Guidelines for Appointment Summaries and Notes in The Bay Advisor

What is Bay Advisor?

The Bay Advisor, a product from the Education Advisory Board (EAB), is a tool for faculty and professional advisors to identify, track and share advising appointment summaries and notes that document interactions and other relevant information of students to assist with timely graduation.

This student advising platform enables advisors to search for an individual student and groups of students, communicate through email or text, schedule appointments, and review student success markers, including missed core major classes, failed coursework, repeated coursework and university requirements.

The benefits of a single, accessible repository for appointment summaries and notes include improved communication, coordination, efficiency, transparency, and a more personalized student experience in advising. Timely, high quality academic advising is critical to meet student success goals set by CSUEB and the CSU-wide Graduation Initiative 2025.

What's the difference between an Appointment Summary and a Note?

- Advising Appointment Summaries document important information about advising appointments, such as dates, times, reasons and locations. An appointment summary should always be tied to a specific advising encounter (appointment) between you and a student or group of students. Summaries are not currently student facing.
- Notes describe information about the student that you gained outside of an appointment. They are often more transactional in nature. For example:
 - From the Registrar's office: "In compliance with CSUEB Repeat Policy, student has exhausted maximum allowed units"
 - From the major advisor: "Substituting XXX300 for YYY301 in the student's degree plan"
 - Any advisor leaves a voicemail or sends an email notification. Please include the actions and/or recommendations to the student in the note.
 - Notes are uploaded to PeopleSoft nightly and can be made viewable by the student in Bay Advisor with the selection of the appropriate visibility box.
- Both notes and appointment summaries should summarize a meeting, a phone call, or other student communication and provide clear, concise information to benefit other advisors or staff who may see the student in a future interaction.

Why should you create an Appointment Summary when meeting with a student?

- Reminder of the advice given during meetings with students (in person, by email, phone or Zoom).
- Help advisors and other student support staff communicate and provide consistent, informed service to benefit the student.
- Create an "institutional memory" of contacts and recommended actions.
- Record valuable data on student use of support services and associated outcomes.

The content of Appointment Summary aims to communicate:

- For what was the student seeking help?

- 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?
- Summary of what you discussed as it relates to student's success and graduation

Why should you create a Note?

- Record important information that you learned outside of an advising appointment (e.g. changes in registration, course substitutions, etc.)
- Record outcomes of your efforts to resolve issues for the student.
- Want to publish a file or notes for students to view within Bay Advisor.

FERPA Considerations for Appointment Summaries and Notes

Please review the Student Privacy/FERPA Guidelines for Faculty and Staff at <https://www.csueastbay.edu/registrar/records/ferpa-privacy-policy.html>.

Individuals who have access to Bay Advisor must never share information learned from Bay Advisor with anyone who does not have Bay Advisor access. This includes not sharing information with parents/guardians or family members. Also, data should not be shared with faculty members, staff, or administrators who are not FERPA trained and/or do not have a legitimate educational interest. This expectation is to comply with FERPA and prevent sharing private information with others who do not have the right or permission to view a student's educational record.

Guidelines for writing appointment summaries and notes:

- Write (and advise) within your scope of practice.
- Details are based in fact and do not represent observations, perspectives, guesses, bias, predictions, etc.
- Describe don't evaluate.
- When it doubt leave it out.

Additional Best Practices for summaries and notes:

- Sensitive information should only be included when academically relevant and handled with discretion, given that all advisors with Bay Advisor access may view the student's advising history. It is best to note sensitive information under general headings of family, financial, academic, personal, or health.
- Use a professional, non-judgmental tone when writing notes. Record facts and observations, and NOT inferences or assumptions. For example, instead of writing, "Student seems depressed" or "Student appears anxious," state "Student talked about personal issues and current stressors."
- Keep advising records brief and relevant and use only the most commonly understood abbreviations (e.g. SCAA, AACE).
- Record information that the student communicates to you in their words. For example, "Student reports that she will be withdrawing for health reasons."
- Document information discussed regarding University and department policies and deadlines. For example, "Student inquired about withdrawing from a class. Explained procedure and informed student of the upcoming withdrawal deadline."
- Advisors are expected to document referrals to other departments, including campus offices such as Student Health and Counseling Services (SHCS), AACE: Advising, AACE: Career Education, Accessibility Services, and academic departments, but not include sensitive information related to the referral. These referrals are in a separate text box within the summary.

Advising Appointment Summaries & Notes Do's and Don'ts

Do	Don't
<p>Briefly summarize what was discussed as it relates to student success for future reference by the student, other support staff, and future advisors:</p> <ul style="list-style-type: none"> ● Recommendations: "Recommended student take Math 110 with Math 10 to assist with mathematical foundation." ● Advice: "Cautioned against taking 18 units this semester due to work/life/school balance." ● Action Plans: "Student plans to follow up with SCAA and schedule an appointment with me after Math midterm exam." 	<p>Summarize everything that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals, and follow-up plans:</p> <ul style="list-style-type: none"> ● Include personal/sensitive information: "Student disclosed they have been visiting Student Health and Counseling Services." ● Include unnecessary details: "Said she is having a terrible week and can't wait to move out of her apartment."
<p>Summarize specific course recommendations in the appropriate text box:</p> <ul style="list-style-type: none"> ● "Advised student to take HIST 110 for needed GE and Code." ● "Recommended SOC 1 at Chabot College this summer to finish GE area D." 	<p>Report problems with specific courses or instructors:</p> <ul style="list-style-type: none"> ● "Student reports his Math class is unorganized and he is lost." ● "Student said CRJ professor is unfair in grading."
<p>Spell things out for a general audience</p>	<p>Use acronyms that others may not understand.</p>
<p>Write fact-based academic related notes:</p> <ul style="list-style-type: none"> ● "Student is concerned about grades in two courses." ● "Student needs to follow prerequisite courses and roadmap" ● "Student is unsure of major fit. Discussed options and where to research information" 	<p>Include speculation, subjective opinions, or judgements:</p> <ul style="list-style-type: none"> ● "Student lacks motivation." ● "Her personality isn't a good fit for STEM majors." ● "He is avoiding Chem 111 because he struggled in CHEM 110."
<p>Use general or coded language concerning sensitive material:</p> <ul style="list-style-type: none"> ● "Student is dealing with a <i>personal event</i> and will need to make up class work." ● "Student reported <i>extenuating circumstances</i> related to their academic success this semester." ● "She discussed a <i>difficult situation</i> and has requested help from a campus support service." 	<p>Include sensitive information, personal concerns, and private matters:</p> <ul style="list-style-type: none"> ● "Student is pregnant, due date is in late March and will miss school." ● "Student's parents are getting divorced." ● "Student reported she was assaulted by her boyfriend earlier this semester." ● "He disclosed he was diagnosed with dyslexia."
<p>Record referrals made and resources shared:</p> <ul style="list-style-type: none"> ● "Shared information about Student Health and Counseling Services." ● "Referred to Financial Aid Office." ● "Referred to Accessibility Services." 	<p>Report details surrounding sensitive referrals:</p> <ul style="list-style-type: none"> ● "He said he can't concentrate because of relationship problems with his girlfriend. I referred him to SHCS." ● "Little to no financial support at home and a first gen student. Student debt is piling up and needs to see financial aid." ● "Student was in a car accident, broke their leg, and can't make it to classes."

<p>Include notes about positive student behaviors:</p> <ul style="list-style-type: none">● “Student came prepared for session with major roadmap filled out.”	<p>Include negative judgements on student behaviors:</p> <ul style="list-style-type: none">● “Student blows off advising appointments. I can’t get her to be serious or plan ahead.”
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Building a campus community that supports and cares for our students takes the efforts of us all. Communication is key to the coordinated care advising culture we strive to create, and with your help in creating these summaries and notes, we each support our students in our own way to meet their goals and graduate. If you have any questions or comments about The Bay Advisor, please contact bill.irwin@csueastbay.edu.