



With FERPA in mind:

Assume students, parents, or the general public will read anything and everything you have written.

When writing your advising reports and notes, ask yourself the following questions:

- 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? Do I have the necessary training, and is this something germane to my area of professional expertise?
- Are the details in my notes based on fact or do they merely represent my own observations, perspectives, guesses, predictions, diagnoses, etc.?

Advising reports and notes should be academic-related and avoid including personal, potentially sensitive content.

Personal and/or sensitive content, whether reported by the student or assumed by you, may include:

- Medical / mental health concerns
- Legal problems
- Relationship problems
- Family concerns
- Conflicts with specific instructors
- Information about academic integrity or student conduct proceedings

Tips to Remember

*“Describe, don’t evaluate”
“When in doubt, leave it out”*

Recording Advising Reports and Notes – Dos and Don'ts

<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>	<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"> • Recommendations: “Recommended student take MATH 116 to create a more solid mathematic foundation.” • Advice: “Cautioned against taking 18 credits this semester given work schedule.” • Referrals: “Referred to Career Services.” • Action Plans: “Student plans to follow up with tutoring and schedule an appointment with me after mid-terms.” 	<ul style="list-style-type: none"> • Include unnecessary details: “She said she has been having a good week and is especially excited about moving into a different apartment.” • Include personal/sensitive information: “Student disclosed that she has been visiting the Counseling Center.” • Include subjective opinions.
<p> Summarize specific course recommendations</p> <ul style="list-style-type: none"> • “Encouraged student to take SOC 250 as a gen ed.” • “Recommended student take BIOL 151 fall semester 2021.” 	<p> Report problems with specific instructors</p> <ul style="list-style-type: none"> • “Student doesn't like his MATH 225 instructor.” • “Student said GEOG 210 professor has unfair grading policies.”
<p> Spell things out for a general audience and/or write fact-based academic-related notes</p>	<p> Use acronyms students and other campus support staff may not understand. Include speculation, subjective opinions, or judgments</p>
<ul style="list-style-type: none"> • “Student is concerned about grades in two courses.” • “Student is considering whether his current major is a good fit. Helped him consider other options.” • “Student needs to successfully complete PSYC 101 before taking any upper level PSYC courses.” 	<ul style="list-style-type: none"> • “I don't think she is very motivated this semester.” • “His personality isn't a good fit for STEM fields. I think he'd feel more at home doing something artistic or creative.” • “She has probably been avoiding BIOL 221 because she struggled with BIOL 121.”
<p> Use general or coded language concerning sensitive material</p>	<p> Include sensitive information, personal concerns, private matters</p>
<ul style="list-style-type: none"> • “Student reported extenuating circumstances related to his academic progress this semester.” • “She 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.” 	<ul style="list-style-type: none"> • “Student's parents are going through a divorce.” • “She reported she was assaulted by her boyfriend earlier this year.” • “Student was recently diagnosed with an autoimmune disorder.”
<p> Record referrals made and resources shared</p>	<p> Report details surrounding sensitive referrals</p>
<ul style="list-style-type: none"> • “Shared information about the Counseling Center.” • “I discussed resources at Student Health Service.” • “Referred to Financial Aid Office.” • “Referred to Student Success Center.” 	<ul style="list-style-type: none"> • “He said he can't concentrate because of relationship problems with his girlfriend. I referred him to the Counseling Center.” • “He said he's been having a lot of headaches lately. I'm concerned something more serious may be going on. I suggested he go to Student Health Service to get it checked out.” • “Little financial support from family. First Generation student with significant debt building up.”
<p> Include notes about positive student behaviors</p>	<p> Include negative judgements student behaviors</p>
<ul style="list-style-type: none"> • “Student came prepared for session with course plan filled out.” • “He has spent time talking with two EE professors to learn more about potentially hanging to that major.” 	<ul style="list-style-type: none"> • “She seems like she just blows off advising appointments. I can't get her to be serious and plan ahead.” • “He seems pretty uninformed about the real world after college and hasn't followed through with plans to get information from his Sociology professor. I think he needs to be more realistic.”