Advising Notes – Best Practice Recommendations

Recommendations for Writing Advising Reports / Notes

- Write notes as soon after the appointment as you are able – within 24 hours is best.
- Include information that will help you to recall the conversation at a later time.
- Include any referrals to campus offices, staff/faculty, or resources.
- Provide an objective assessment of the student’s disposition, if relevant.
- Do NOT include any information that you would not want the student to read.
- Encourage students to take responsibility for taking their own notes during the meeting.

Sample Advising Reports / Note Entries

1. *Met with James today to discuss possible change of major to Finance. We reviewed requirements and dates for the application, as well has his grades so far in related courses. He plans to take ECON 103 and MATH 221 in Spring 2017 before submitting his application.*

2. *Alicia made an appointment for today to discuss her struggle with MATH 241. She is feeling very nervous about her ability to raise her grade. We reviewed her grades so far and discussed tutoring options. She indicated that since she has class in the ISE Lab, she’d like to start there. However, I also showed her how to access the individual tutoring in the OAE as well as the Math Tutorial Lab in McKinley. We made plans to meet again in two weeks, so that she can review her progress before the 10/25 Academic Penalty Deadline. She understands that after 10/25, she can no longer make adjustments to her enrollment or grading status.*

Purpose of Advising Reports / Notes

Advising Reports / Notes help advisors maintain an accurate record of advising, referrals, and recommendations. Advising notes, including those entered in online platforms, become a part of the students’ academic record. Advisors should ensure that notes are complete, professional, and able to be reviewed by the student, other assigned advisors, and/or other campus professionals, as required. Notes entered into the system should be brief, academically-focused, and understandable when read individually. Below are examples of what to include and not to include in a note.

Information to include, with examples:

1. Lists of **approved courses**, along with alternative options.
   - *During registration advising, the student agreed to enroll in the following for Spring 2017: ENGL 110, MATH 241, PSYC 100, ECON 101. If student is unable to enroll in ECON 101, she will look for Group A breadth elective.*

2. **Action items and reminders** for student; as well as **administrative information** for your record keeping.
   - *Asked student to prepare list of alternate majors and possible courses for registration advising appointment; Student missed scheduled appointment on 10/25/2016.*
3. Possible consequences of not following the given advice.
   - Discussed the need for student to earn a 2.0 GPA this semester to avoid being placed on academic probation; Cautioned student against taking 18 credit hours while working.

4. Notes that will help the advisor recall specific advising information, or help future advisors or other advisors working with the student understand the student or advice that was provided.
   - Student is taking MUSC 185 due to her desired minor in Music – Musical Studies.
   - Student decided to retake MATH 241. Although they have AP credit for MATH 241, they would feel more comfortable taking the course at UD before moving on to MATH 242.

5. Referrals to other campus resources
   - Referred student to meet with the Director of Undergraduate Programs in the Department of Communication to discuss their competitiveness to enter the program.
   - Referred student to Disability Support Services (DSS) to discuss possible accommodations.

6. Comments that help you in future interactions with student (e.g., creating reference letters for students)
   - Student has expressed interest in becoming a physical therapist. Shared that they are the new president of Pre-Health Club; Student indicated they are doing a summer internship.

7. Summaries of emails from referred parties (irrelevant to academics)
   - Received email from Jasmine Adams regarding enrollment approval in CISC 108 for Fall 17.

Information NOT to include, with examples:

1. Personal judgments or editorial comments about the student, especially when negative.
   - DO NOT WRITE: Student is not strong in math or sciences, but wants Biomedical Engineering. This will never happen!
   - DO WRITE: Encouraged student to continue career and major exploration process due to grades in math and science.

2. Comments regarding student's instructors, especially when negative.
   - DO NOT WRITE: Student is planning to drop ENGL 110, because she is not partial to instructor's teaching style.
   - DO WRITE: Discussed different teaching and learning styles and effective strategies for ENGL 110.

3. Details about a student's diagnosis or possible diagnosis.
   - DO NOT WRITE: Student told me he has bipolar disorder and will be out of school having treatments.
   - DO WRITE: Taking grades of “I” for Fall 2016 courses due to medical issue.

4. Details about student's personal hardships or concerns.
   - DO NOT WRITE: Student feeling upset about breaking up with long-time girlfriend.
   - DO WRITE: Student discussed personal challenges. Referred student to Counseling Center.

Example for Registration Advising:

Met for Registration Advising on 11/1/16; Discussed the following 16 credits for Spring 2017: ENGL 110, MATH 221, ECON 103, PSYC 100 (or SOCI elective), and GEOL 105/115 (or other MNS&T elective with lab); Discussed the importance of doing well in all courses, but especially MATH and ECON for application to Marketing major; Alternate major suggested by student: Accounting. Alternate majors suggested by Advisor: Economics; Suggested tutoring support through OAE for MATH 115.
Electronic Documentation (Advising Reports, Alerts, Notes, etc.):

UD employees whose access to BHSC affords them the ability to write advising reports, alerts, and notes must conform to federal law and institutional policies. Similarly, the National Academic Advising Association (NACADA) Statement of Core Values provides direction:

- Advisors [and academic support professionals] respect student confidentiality rights regarding personal information. Advisors [and academic support professionals] practice with an understanding of the institution's interpretation of applicable laws such as the Family Educational Rights and Privacy Act (FERPA).

- Advisors [and academic support professionals] seek access to and use student information only when the information is relevant to the advising process. Advisors [and academic support professionals] enter or change information on students' records only with appropriate institutional authorization to do so.

- Advisors [and academic support professionals] document advising contacts adequately to meet institutional disclosure guidelines and aid in subsequent advising interactions.

Advisors and academic support professionals must:

- Make and view notes only for students with whom they directly work. It is a violation of FERPA to access data for which you do not have an educational need to know.

- Inform students that they will be keeping notes relevant to their academic progress that may be accessed by other advisors or academic support professionals who are also working with the same students.

- Recognize that advising reports and notes are considered part of the student’s educational record and that students can request to inspect their educational record. Educational records can also be subpoenaed.

- Record information that is clear, professional, and relevant. Advising reports and tutoring reports provide a summary of meetings with students. Documentation should be objective, concise, and void of judgements or value statements.

- Include information in advising reports, tutoring reports, and notes which will be helpful during future appointments with the student, this includes documentation indicating policies, procedures, requirements, deadlines, etc. shared with the student.

- Focus on information pertaining to the student’s academic progress, situation or questions. Details regarding medical, personal, or other sensitive issues should be avoided.