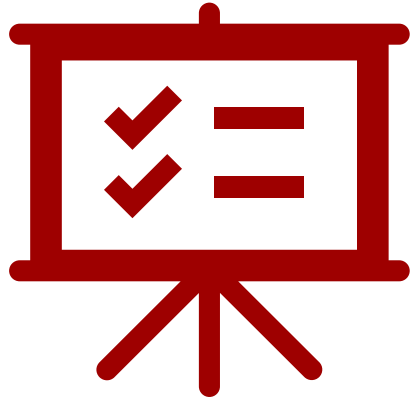# Best Practices in Advising Notes

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Agenda

- Why documentation matters
- When to save a note
- What to include in a note (and what *not* to include)
- Ways to streamline note taking

Advising Notes: <u>Why</u> Documentation Matters
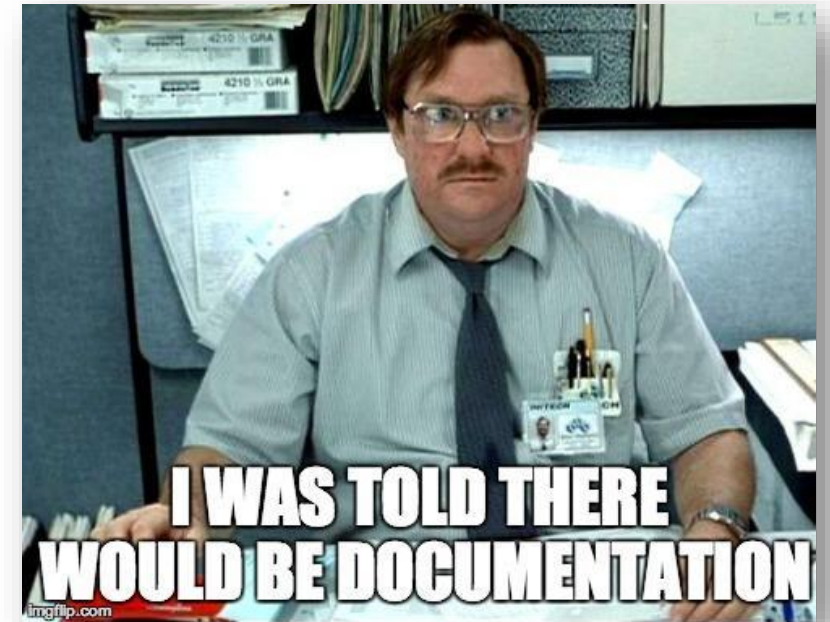
Why Documentation Matters

- To accurately and consistently document policy, procedures, practice, and our interactions.

- To ensure a shared understanding of communication between us, the parents/families, and the student.

- To support our students (and foster rapport) through streamlined communication when working with a variety of constituents across campus.

- To support our colleagues in supporting our students.

- To ensure that we have documentation of the interaction in case questions/challenges with a situation emerge.

Advising Notes: <u>When</u> to Document

When to Save an Advising Note

- Every **substantial advising-related contact** (phone, email, in-person) with a student or relating to a student should be documented.
  - Includes parent/family interactions and interactions with others on campus about a student.

- Record notes as soon as you're able to so that others on campus have the most up-to-date information.

- Overarching expectation: record a note at the *end* of *every* student interaction.
  - (e.g., after several email exchanges, copy/paste entire thread into one advising note)

- You do NOT need to document academic events or announcements that others do *not* need to be aware of.

Advising Notes: <u>What</u> to Document

Topic areas to document

Document:	Examples:
Course/degree planning conversations and recommendations	• Course recommendations and/or substitutions • Approved academic plans • Registration PIN deletion (recommended)
Policy interpretations and recommendations	• Leaves of absence • Academic standards • Academic exceptions • Grade petitions
Issues or problems raised during the interaction	• Difficulty in a particular course • Follow-up on submitted alert(s)
Action items and reminders for both students and advisors	• Reminder to bring registration plan next appointment • Reminder for advisor to connect student with pre-health advisor
Possible consequences of not following recommendations or advice	• Explanation to a student for the importance for remaining above a 2.0 GPA in order to remain in good standing
Resources and referrals	• Referrals to academic *and* campus life resources (i.e. The Writing Center, Student Outreach and Support, etc.)
Outreach attempts (if interaction initiated by advisor); Missed appointments	• Outreach to student for alert follow-up • Outreach to student for incomplete(s) • Outreach to student inviting them in for an appointment • Student no-shows for scheduled appointments

Advising Notes: How (and What) to Document

How to properly document notes

✔ Do:

- Briefly summarize what was discussed as it relates to student success for future reference by yourself, the student, or other student success staff.

Recommendations: "Recommended taking MATH 1951 for CHEM major."
Advice: "Cautioned against taking 18 credits while working part-time."
Referral: "Referred student to the Math Center for help with upcoming exam."
Action plan: "Student plans to schedule student success coaching and make follow-up appointment after mid-terms."

✘ Don't:

- Summarize *everything* that was discussed in the interaction. Notes are meant to be brief and highlight recommendations, referrals, and follow-up plans. Don't include unnecessary details.

Unnecessary information: "She has been having a good week and is looking forward to May Days."

How to properly document notes

✅ **Do:**

- Use a subject line that is informative and specific.

Subject: Spring 2022 registration plan

❌ **Don't:**

- Use a subject line that is broad or vague.

Subject: Student Appointment

How to properly document notes

✓ Do:

- Focus on including fact-based, academic notes.

  - "Student is concerned about grades in MATH 1200 and FSEM 1111."
  - "Student is questioning whether engineering major is a good fit. We spoke about other options, such as Computer Science."
  - "Student needs to complete MATH 1953 before she can apply to pre-health program."

✗ Don't:

- Include speculation, subjective opinions, or judgements.

  - "I don't think the student is very motivated this quarter."
  - "Her personality isn't a good fit for the STEM program. I think she'd feel more at home in a creative or artistic field."
  - "He has probably been avoiding MATH 1953 because he struggled in MATH 1952."

How to properly document notes

✔ Do:

- Use general, overarching language about sensitive subjects and concerns.

> - "Student reported **extenuating circumstances** related to his academic performance this quarter."
> - "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 term."

✘ Don't:

- Include sensitive or personal information, such as medical diagnoses, legal issues, family concerns, relationship issues, or specific instructors.

> - "Student's parents are going through a divorce."
> - "She reported she was assaulted by her boyfriend earlier this year."
> - "Student was recently diagnosed with clinical depression."
> - "Student has to go to court tomorrow morning and will miss her Spanish class."

How to properly document notes

✓ Do:

- Spell things out for a general audience.

> "Called and left a **voicemail** for student's parents."

✗ Don't:

- Use acronyms or codes that others on campus may not readily understand.

> "Left **vm** for student's parents."

How to properly document notes

Do:

- Include referrals made to the student.

> - "Referred student to the Health and Counseling Center."
>
> - "Referred student to Student Outreach and Support."
>
> - "Referred student to Disability Service Program."

Don't:

- Include detailed information about sensitive referrals.

> - "He said he can't concentrate because of relationship problems with his girlfriend. I referred him to the Health and Counseling Center."
> - "Student in financial and academic distress. Submitted a SOS referral for help."
> - "Student reported having a lot of test anxiety. I referred him to Disability Services."

How to properly document notes

✅ Do:

- Factually summarize issues going on with specific courses.

  - "Student is encountering challenges with MATH 1200 course."

  - "Student is going to apply for a grade appeal for PSYC 1001."

❌ Don't:

- Report problems with specific instructors.

  - "Student is having a personality conflict with MATH 1200 instructor.

  - "Student said PSYC 1001 instructor assigned an unfair final grade."

How to properly document notes

✓ **Do:**

- Write all advising notes as if the student (and others) will read them.

- For parent/family interactions, include confirmation of an active FERPA on file.
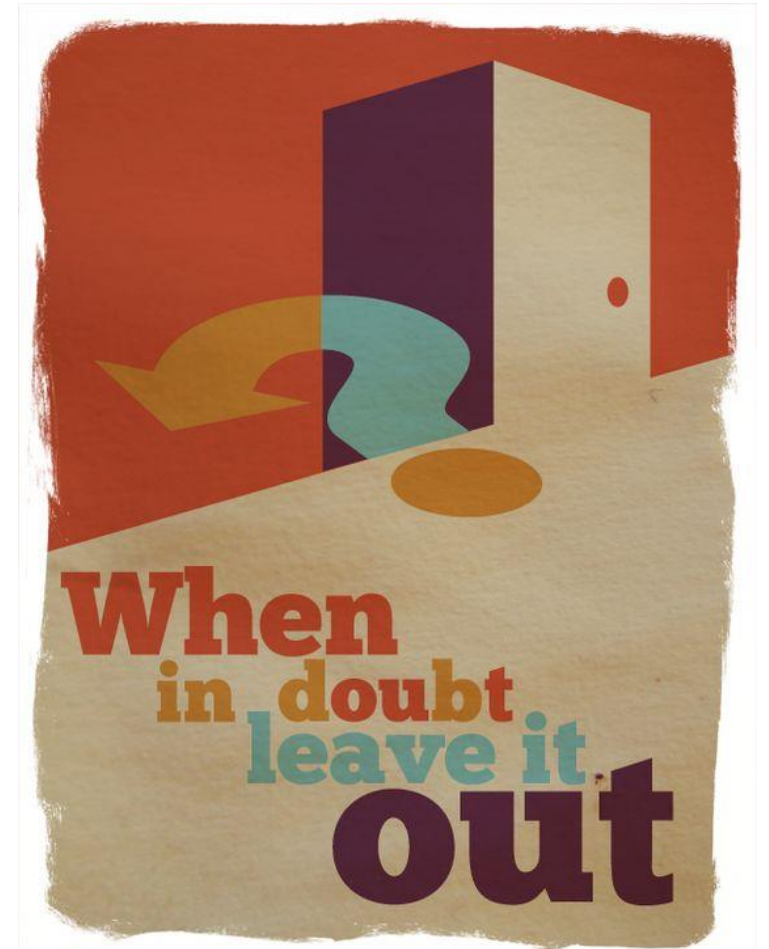
Self-Check Questions

When entering your comments, assume others will read your comments and ask yourself:

- Is this something you think the student would want other people to know during their academic career at DU?

- Is this something another colleague would need to know? Why?

- Are the details in my reports based on fact or expert opinion, and not self-perspective or hearsay?

- Inspire Advising Note Guidelines

Remember, You Should Check Yourself Before You Wreck Yourself

your ecards
someecards.com
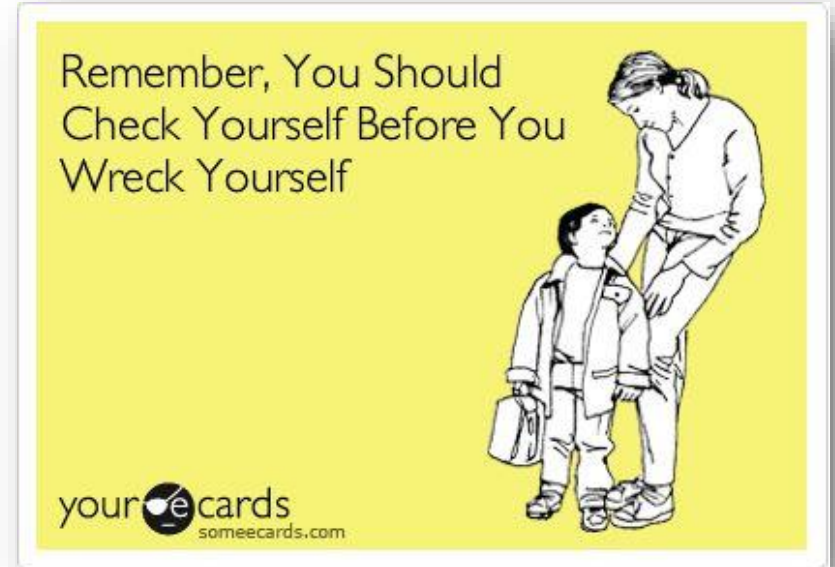
Advising Notes: How to Streamline Note Taking

Streamlining note documentation

- Notes connected to an appointment in Inspire
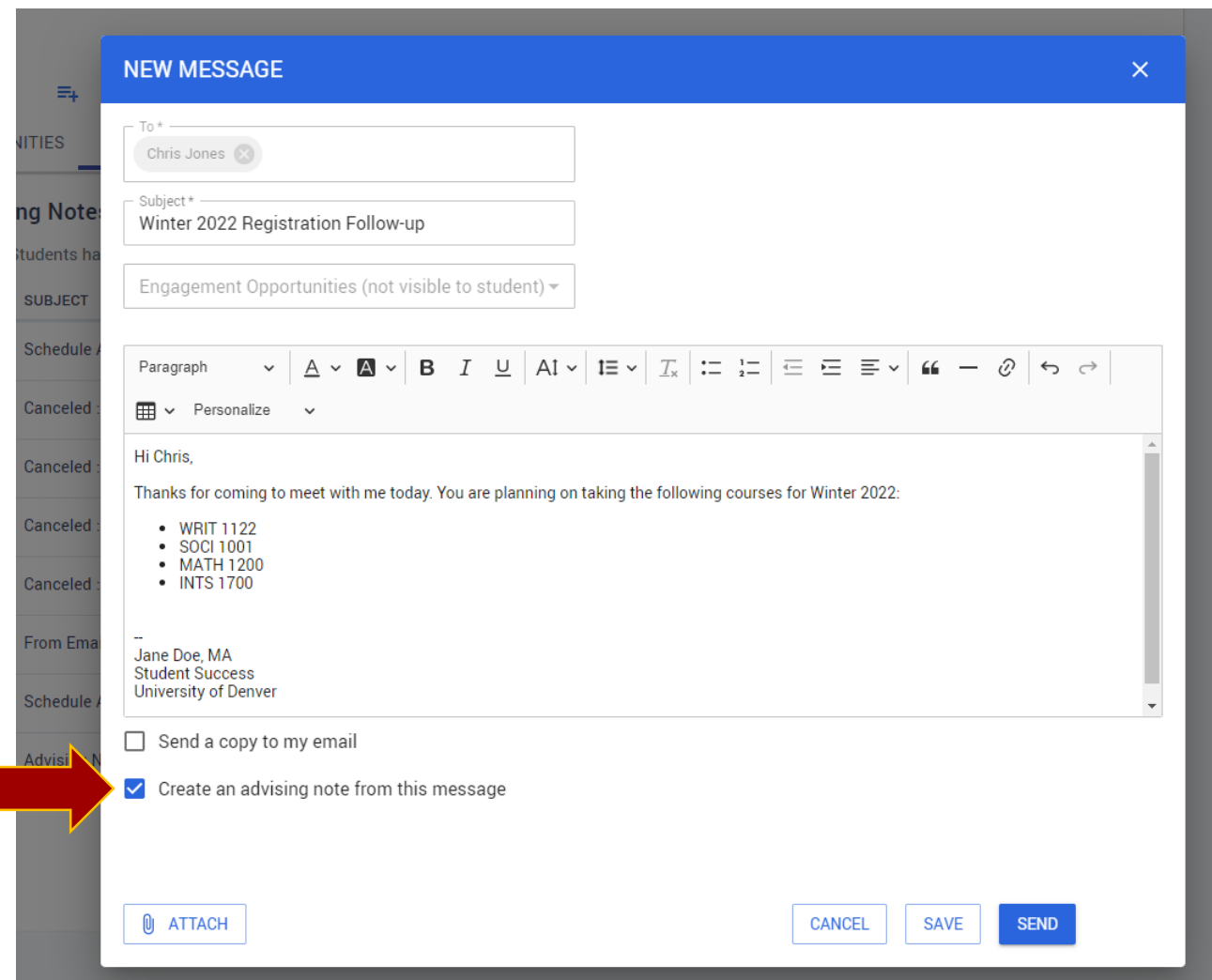
Streamlining note documentation

Notes you'd like to email the student *and* save in Inspire

- Save initial message as note (so others on campus know you're trying to connect with student)

- Then, when interaction is complete, update note with overarching points (or full thread if important).

- Messages sync with Outlook
  - If student replies, reply will go to your DU email inbox and entire thread will be saved in Inspire *communications (**not** in notes)*.

Streamlining note documentation

- Student-initiated email conversation
  - Once interaction has completed, summarize overarching points in advising note (or copy/paste interaction *if important*).
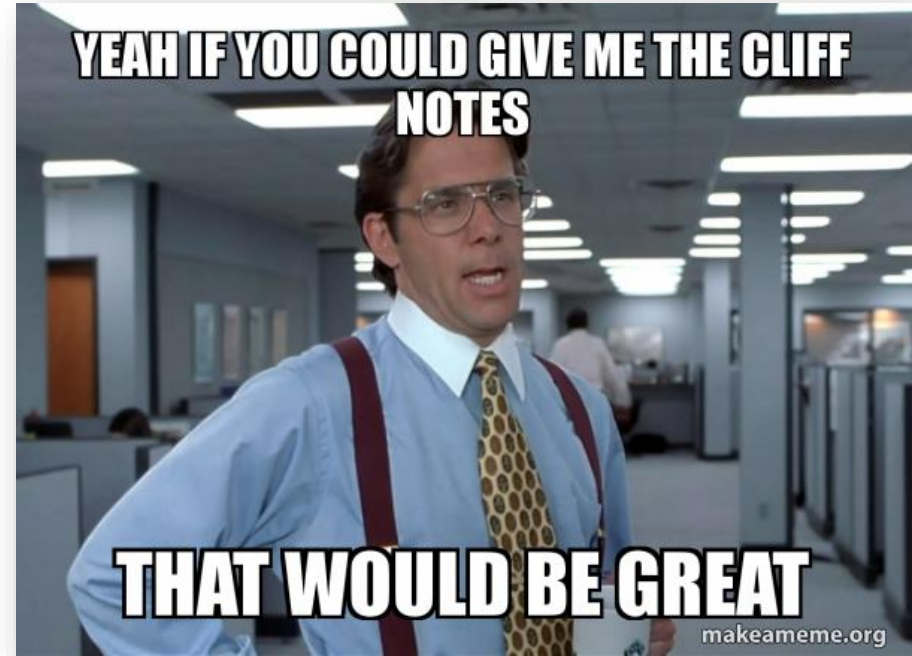
Practice: Write advising notes for following scenarios

- You have a brief advising meeting in which the student shared which classes they are taking next quarter, the two of you reviewed how they fit into overall degree progress, and you deleted their PIN.

- A student sent you an email describing multiple instances in which they perceived that the professor for a course was inflexible, inconsistent, and unhelpful. They asked whether they should complain to someone about the professor, whether it was a good idea to drop the class this late in the quarter, and what their options were if they stay in the class but receive a grade they don't think is fair.

- A student discloses that a close family member died tragically and unexpectedly, and they have to travel for the funeral. They also indicated that they are having a hard time dealing with it because of a past traumatic experience. They asked for your input about what this means for their classes.

- A father called to discuss son's recent diagnosis of dyslexia and what options there are to support him. He also discloses his recent divorce, mentioning that this may also be having an impact on his son's performance. There is no active FERPA on file.

Questions?