Notes – Standards, Guidelines, and Best Practices

Notes provide an important history of information discussed with the student and should be written during or as closely following the meeting as possible. Notes are part of a student’s education record that will benefit both you and future advisors/student services staff who are assisting the student. The Family Educational Rights and Privacy Act of 1974 (FERPA) states all students have a right to view their education record—including advisor notes—therefore, it is especially important notes are professionally written. Please keep the following in mind.

1. Include notes that will help both the student and a future advisor or other support staff.
   o Include important details. Ask yourself, “Will my notes give the next advisor a clear understanding of what has been discussed previously?”

2. Write all notes as if the student will read them.
   o Stick to the facts. Work to eliminate subjectivity from your notes.
   o Notes are not clinical notes so avoid statements such as, “Student appears to have ADD,” or “Student is depressed,” even if you are a trained or licensed mental health provider.
   o Express concerns in terms of observed behavior. “Student was easily distracted.”
   o If you have a personal concern or must include a subjective statement, frame it as such: “I am concerned about ‘A’” or “In my opinion, ‘B’” to express personal concern without stating that concern as a fact.

3. Include lists of courses approved along with alternatives if a course fills.
   o “We agreed to 15 credits for spring including the following courses: 1, 2, 3”

4. Include possible consequences of not following advice.
   o “Discussed taking class X in Spring or class Y can’t be taken the following Spring.”
   o “Explained GPA requirement by end of Spring semester to be admitted to the major.”
   o “Cautioned student about taking more than 18 credits next semester.”

5. Include comments that will facilitate your relationship with the student.
   o “We agreed to meet in a month. Student will schedule.”
   o “Encouraged student to make an appointment to check in before midterms.”

6. Include information about referrals of a non-sensitive nature.
   o “Encouraged student to visit the Writing Center.”
   o “Recommended the student speak with the associate dean about transfer credits.”

7. DO NOT include information of a sensitive or private nature.
   o There is no such thing as private notes in an online system. Do not use the Private Note check box as checking this box does NOT make it a private note.
   o “Student’s mother is very sick and she is thinking of going home.”
   o “Student reported being assaulted. Referred her to counseling.”

8. DO NOT include negative comments about instructors, other advisors, or staff.
   o “Student says her professor doesn’t like her and isn’t fair.”

9. DO NOT include subjective judgements about the student.
   o “I doubt the student’s ability to succeed in this major.”