

## Advising Refresher: Best Practices for Advising Notes

### ***Why take notes?***

- Advisors need to document advising contacts adequately to aid subsequent advising interactions
- Notes help provide a consistent advising experience for the student
- Other advisors will be able to see how the student was previously advised and provide a more continuous advising experience (vs. making the student repeat information for each advisor)
- Provides documentation that can easily clear up misunderstandings between students and university personnel
- Documentation also provides protection in case of legal action

### ***Tips for Effective Note Taking***

- Write your notes on a student meeting as soon as possible
- Be factual and objective.
- When framing your notes consider including information that:
  - Helps the student
  - Helps future advisors or colleagues understand the student or the advice you provided
  - Includes a list of courses you advised the student to take along with alternatives
  - Facilitates the relationship with the student
  - Explains possible consequences if advice is not adhered to
  - Includes referrals of a non-sensitive nature
  - Includes referrals of a sensitive nature, with limited details
  - Helps you in future interactions with the student

### ***Do's and Don'ts***

#### ***DO:***

- ✓ Keep notes as brief & succinct as possible
- ✓ Be specific when describing what was discussed & agreed upon between you & the student
- ✓ Include general information about the student
- ✓ Record all courses you recommend the student take (& why if appropriate)
- ✓ Note all referrals that were made

#### ***DON'T:***

- ✗ Write in code.
- ✗ Write subjective comments about the student
- ✗ Include student's comments about faculty or staff, especially negative ones
- ✗ Include personal information about the student that is sensitive
- ✗ Include your personal thoughts about the student