Advising Notes – Best Practice at Southeast – Use SupportNET for recording advising information and appointments

- Advising Notes: Add Note (select Advising Notes) and record appointment information
- Change the date, if needed, to the exact date that you met with the student.
- Add **Subject** line (*Important for describing & organizing the note types, ie: Spring 2019 advising notes*).
- The note type "Advising Notes" is a template that lists relevant advising information that will need to be filled in based on the outcomes of the advising appointment in the *Note space.
- You have options at the end to send email copies to yourself or the student.
- Note Sharing will default as "shared," which means that individuals with the roles listed who have a relationship with the student (listed in the blue box labeled "Note Permissions" beneath the Note Sharing settings) will be able to view this note on the student folder.

    Best Practice – **always send a copy of advising notes to the student so both parties have a record of what was discussed.

- If you select the radio button to make the note "private," only you will be able to see the comment.
- Click **Submit**.

Record Individual Outcomes on the Appointment (Calendar) icon

- Record No-Shows
- Document the Time and Duration of Your Meeting (optional)

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.

   - 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.

   - Stick to the facts. Work to eliminate subjectivity from your notes.
   - 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.
   - Express concerns in terms of observed behavior. "Student was easily distracted."
   - 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 is full/not available.

   - "We agreed to 15 credits for spring including the following courses: 1, 2, 3"
   - Use the note type "Advising Notes" and fill in the template prompts within the *Note to fill in relevant advising information.

4. Include possible consequences of not following advice.

   - "Discussed taking class X in Spring or class Y can't be taken the following Spring."
   - "Explained GPA requirement by end of Spring semester to be admitted to the major."
   - "Cautioned student about taking more than 18 credits next semester."

5. Include comments that will facilitate your relationship with the student.

   - "We agreed to meet in a month. Student will schedule."
   - "Encouraged student to make an appointment to check in before midterms."

6. Include information about referrals of a non-sensitive nature.

   - "Encouraged student to visit the Writing Center."
   - "Recommended the student speak with the associate dean about transfer credits."

7. **DO NOT** include negative comments about instructors, other advisors, or staff.

   🚫 "Student says her professor doesn't like her and isn't fair."

8. **DO NOT** include subjective judgements about the student.

   🚫 "I doubt the student's ability to succeed in this major."