**Purpose of Advising Notes**

Advising notes are used to help the advisor and the student recall information covered in advising meetings, emails, and phone conversations. The primary purpose should be to convey the main substance of the appointment, the goals and outcomes of the meeting, and any agreed-upon follow-up or action items for both the advisor and the student.

**Why Take Advising Notes?**

- Help students remember advice they received during advising appointments.
- Help advisors and other student support staff communicate and provide consistent service.
- Create an “institutional memory” of contacts and recommended actions.
- Personalize the advising experience by refreshing the advisor’s recollection of previous conversations.

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**FERPA and Advising Notes**

The Family Educational Rights and Privacy Act (FERPA) entitles students to access any notes considered part of their academic record. Any notes entered in EAB Pathfinder or DegreeWorks are considered part of a student’s academic record and are accessible by students, open records requests, and court subpoenas.

*NORE: This applies to notes whether they are designated as shared with students or not.*

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**Best Practices of Note-taking**

- Assume students, parents, or the general public may read what you write.
- Describe (objective), do not evaluate (subjective). Be Factual.
- Keep notes academic related and avoid including personal, potentially sensitive content.
- Document referrals; this indicates you did something about the student’s situation.

Ask the following questions to help you determine appropriate language and content for notes:

1. *Is this something the student would want other people to know?*
2. *Is this something another advisor would need to know? Why?*
3. *Is this something that is within my expertise and scope of practice? (i.e., Do I have the necessary training, and is this related to academic advising?)*
4. *Are the details in my notes based on fact? Or, do they represent my own perspectives, guesses, diagnoses, etc.*

If you answer ‘No’ to any of these questions, you may want to revise the content of the notes.
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**General Guidelines for Advising Notes**

Include notes that help current and future advisors understand the student's situation and the advice you gave. *Briefly summarize what was discussed as it relates to academics and student success.*

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<td>• Discussed interest in Psychology minor. Encouraged her to take PSYC 101 to explore that interest.</td>
<td>Don’t include unnecessary details.</td>
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<td>• Student wants to take MATH 141 even though he has AP credit for the course. He feels it will help him be better prepared for future courses in the program.</td>
<td>• She signed a lease this week to live in XXX apartments next year and is excited to buy groceries and cook at home.</td>
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<td>• Advised to take XXcourseXX next semester to stay on sequence in the program of study.</td>
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Include information and action items for the student and possible consequences of not following advice given.

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<td>• He most likely won’t get the GPA needed to stay in the program, even with grade forgiveness.</td>
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