



## Best Practices for Making Student Notes

*Adapted from Missouri State University*

### What to include:

#### **Include notes that will help the student.**

- “Reminded student to get transcripts sent to the Admissions Office as soon as possible to avoid registration hold for spring.”

#### **Include notes that will help future advisors understand the student or the advice that you gave.**

- “Explained GCP courses and mapped out the following: ...”

#### **Include list of courses recommended, along with alternatives.**

- “Planned Spring courses including WRIT 1010 01, MATH 1360 02, and GCP courses. Back-ups include MEDC 2200 01 and 2800 02.”

#### **Include notes that will facilitate a relationship with the student.**

- “Encouraged student to make an appointment with me after midterms to check in.”

#### **Include possible consequences of not following advice given.**

- “Student intends to take 18 credits; discussed heavy academic load with other commitments and necessity to stay organized and manage deadlines in and out of school.”

#### **Include referrals of a *non-sensitive* nature.**

- “Encouraged student to make an appointment with a career counselor.”

#### **Include comments that help you in future interactions with the student.**

- “Student was well prepared for advising session and had tentative classes mapped out. Starting part-time job in Spring.”

### What to exclude:

#### **Exclude your subjective judgments about the student, especially when they are negative.**

- “Student is struggling in all courses; would be better off at community college.”

#### **Exclude referrals related to Title IX.**

- “Student disclosed information about a sexual assault.”

#### **Exclude comments regarding student’s instructors, especially when they are negative.**

- “Student is having a personality conflict with Public Speaking instructor.”

#### **Exclude personal concerns of the student.**

- “Student is going through a child custody battle.”

#### Takeaways

Document all student interactions.

Be factual. Be observational. Don’t diagnose. Describe, don’t evaluate.

If in doubt, leave it out!

Default to shared notes. Use private notes only when documenting highly sensitive information that should only be viewable by you.

Remember that everything noted in the student file, even in private notes/appointments, can be requested by the student under FERPA or could be subpoenaed by an attorney in a legal case.