

Guidelines for Advising Notes

Central Washington University

Objectives

- Enhance service to students.
- Facilitate sharing of advising information for coordinated care.
- Improve advisor effectiveness and institutional integrity.

Purpose

- Provides a summary of the advising session.
- Written with the student's benefit in mind.
- Useful for future advising contacts (by you or another advisor).
- Helps facilitate the student/advisor relationship and provides continuity to the student's advising experience.
- Provides data for assessment purposes.

Consider

- Notes become part of the student record.
- Describe, do not evaluate.
- Use neutral language.
- Be concise.
- Copy and paste should be done with care. (e.g., Do not include HIPPA protected information in notes).
- Use the [Behaviors of Concern](#) reporting tool to detail behavioral concerns (this will be sent to the Office of the Dean of Student Success, Case Managers)

Things to include:

- Enough context to help future advisors (including yourself) understand the student and the advice given.
- Options for academic/life planning that were discussed (e.g. course requirements and sequencing information, referral to internship opportunities, locating scholarships, study abroad options, etc.)
- Action the student needs to take following the advising appointment.
- Possible consequences of not following advice given (e.g. not meeting requirements for major).
- Documentation of action taken by the advisor (e.g. course exceptions).
- Referrals to other resources.

Things NOT to include:

- Detailed information of a sensitive or protected nature (e.g., medical or counseling).
- Subjective judgments and personal opinions about the student.
- Personal/negative comments about university employees or student(s).
- Data that is already included elsewhere in the student record.

General Guidelines: Advising Notes Examples

Include

1. . . . notes that will help the student.
 - “Asked student to bring list of ten possible courses for next quarter to advising session.”
 - “Reminded student to get transcripts from YVC sent to the Admissions Office by June 30 to avoid registration issues.”
2. . . . notes that will help other advisors.
 - “Encouraged student to enroll in MTH 100C based placement score and interest in Computer Science.”
 - “Student took GEOG 250 out of interest even though they already have credit for HIST 143. Understands these fall under K2. One may end up being counted as an elective.”
3. . . . comments that help you in future interactions with student.
 - “Student came to session prepared with questions about major exploration and ideas around what interests they had. Wants to pursue interest and personality inventories offered by career services.”
 - “Student expressed an interest in attending dental school at UW.”
4. . . . list of courses discussed.
 - “Student is planning on taking the following courses Spring quarter: PSY 300, PSY 362, ENG 102. PSY 301 would be good alternative if GE courses is full.”
 - “Summer classes we discussed were ENG 102 and SOC 101. Will take another option in P3K6 if SOC 101 is full.”
5. . . . notes that reflect the relational aspect of advising.
 - “Encouraged student to make an appointment to see me after final grades are posted.”
 - “We agreed to meet once a month during the Fall quarter to help student monitor progress.”
6. . . . possible consequences of not following advice given.
 - “Discussed need to take MATH 100C Fall quarter so MATH 153 can be taken in Winter and student can be admitted to degree program and delay in time to degree if MATH is not completed.”
 - “Student wants to enroll in 18 credits. Cautioned regarding heavy academic load.”
7. . . . non-sensitive referrals.
 - “Encouraged student to see Dr. Pearson about possibility of getting general education credit for some transfer courses.”
 - “Encouraged student to make appointment with career counselor.”

Exclude

1. . . . your subjective judgments about the student.
 - “Student lacks the motivation and drive necessary to persist.”
 - “Based on recent struggles, I think student would have been better off at community college.”
 - “Student admits to making poor choices outside of the classroom that are impacting their academic success. I believe they need to take some time-off to get squared away. The student is too smart not to complete their degree and I shared this with them.”
2. . . . referrals or other information of a sensitive or personal nature.
 - “Student’s parents are going through a divorce. Recommended student seeks counseling support to help overcome depression. Made referral to SMaC”
 - “Referred student to Disability Services for testing. I suspect a learning disability.”
 - *Sentence below is a hypothetical example sent by a mother included in notes by advisor via copy and paste:*
 - “. . . since my son is currently taking Ritalin to overcome ADHD . . .”
3. . . . comments regarding student’s professors.
 - “Student does not respect their ENG 101 professor and believes they grade unfairly. I sympathized with the student and expressed my concerns about the course.”
 - “Student is considering dropping UNIV 101 because they do not like their instructor.”