



Best Practices for Writing Advising Reports & Notes

What should go into a report/note?



- Fact-based, descriptive notes convey the unique dynamics of each student advising contact
- Be specific when describing what was discussed and agreed upon between you and the student
- Use the outline below to help structure the note/report
 - Reason for meeting
 - Information provided to student (e.g., change of major, academic planning, pre-reqs, drop/add, satisfactory academic progress)
 - List of all majors, minors, certificates that are of interest to the student and you discussed
 - List of classes you suggested/discussed for enrollment
 - Note all referrals that were made and use the referral process functionality in Pathways to connect students to resources

Use objective language and be mindful of FERPA

- Exercise care when recording information, conversations, or referrals of a highly personal or sensitive nature
- Do not diagnose, assess, or offer personal judgement about students or their circumstance
- As with any document containing a student's personally identifiable information, advising notes/reports are part of a student's education record and are subject to FERPA
- For more information about FERPA, please visit the Registrar's website
- Note that all Pathways users are required to watch a video on FERPA made by Jennifer Seng and Patti Mathay

