

Note Recording: Best Practices



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Definition and Purpose of Notes

Notes documenting advising services are a core element in providing excellent service to students. These notes should be descriptive but concise in nature, serving several purposes including:

- Building a network of continuous support for students, the information in the notes provides a map of student progress for advisors and other staff who may work with the student. It also allows for a holistic approach to individual progress as students move between advisors, departments, and other service offices.
- Documenting student interactions including in-person meetings, phone conversations, email messages, or other electronic mediums.
- Giving advisors context and history that allows them to focus on key issues for students rather than repeating or revisiting the same information each visit.
- Providing a map of students' individual curricular development and learning. Contact notes can also be valuable in noting or documenting patterns in individual student behavior.
- Providing historical information on student progress and official communication for advisors or administrators.

Guidelines and Consideration in Creating and Managing Notes

- Keep current on updating student notes – letting time pass can mean a loss of important details.

- Narrative notes are helpful and readable, but concise, bulleted statements/summaries are also very effective, and often make it easier to scan the notes in preparing for an appointment.
- Remember to insert a 'subject' in the template. This makes it easier to sort or search through notes as files grow for a student.
- The content of advising or other student notes will be different, but the concerns and the standards for privacy, sharing and confidentiality are the same. Stay current on, and abide by FERPA.
- Notes must never be shared with others if their role does not allow them access to the notes.

Content and Information to Include in Notes

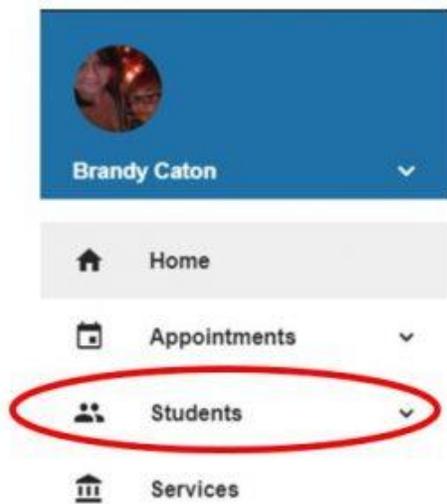
Notes should include:

- Information that will aid you and colleagues in helping the student on their degree or career path.
 - Information that will help colleagues understand the student's situation as well as advice given.
 - A focus on facts and events. Use descriptive comments to summarize conversations and interactions.
 - A list of recommended courses, along with alternatives.
 - Describe when and why exceptions have been made, or note if a form documenting/approving such exceptions has been filed.
 - Any discussion in which a student chooses either to adopt or reject a recommendation you have made along with possible consequences for students of not following advice given.
 - Referrals to campus services or names of staff should be as complete as possible so others can interpret who/what was shared.
 - Action items requested/required of the student and the follow-up timeline should be noted.
 - Notes that will facilitate a personal relationship with the student, or help with reference letters or scholarship applications. This might include personal interests, hobbies, travel, etc.
 - Notes or emails to and from third parties if they have a bearing on degree progress.
 - This could include parents, faculty or colleagues where referrals have been made or questions were directed for help or clarification.
 - When professional judgment suggests that you provide an analysis of a situation that goes beyond simply reporting facts and details, comments should be well grounded in fact and reflection. Focus on observation and reaction rather than accusation. For example, "The student spoke in an angry tone that made me very uncomfortable" vs. "She was a bully and rude in the meeting."
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Recording Sensitive Information

- When recording information about referrals or conversations of a sensitive or very personal nature, care should be exercised with the language used. Keep the record fact-based, and if in doubt, have a discussion with the student about what she or he is comfortable having recorded.
- When the student discloses specific information regarding disabilities or health related matters focus on necessary steps that need to be taken to accommodate the situation. Do not diagnose but report the facts: “Student reported that she has a hard time getting up in the winter. We talked about this and encouraged her not to take early morning classes in the spring semester.”
- Student comments regarding instructors should be carefully evaluated to determine if they merit being included in the notes. If comments have a strong tie to progress, they can be included. This could also be an area where patterns are observed from semester to semester.
- Student reports of specific faculty behaviors or classroom incidents that border on harassment or discrimination should be shared with the appropriate campus leaders and not be recorded in Starfish.

Recording Content of Student Interactions in Starfish Notes



(Available for all students you have a relationship with, e.g. instructor, advisor)

1. Click on the Students tab.
2. Under the My Students tab, search for the student by name, or by ID (w) number. Or you can search for a list of students who with you have a particular connection (such as advisor or instructor of a particular class).

OVERVIEW **MY STUDENTS** TRACKING

Search
Connection
Term
Cohort
Additional Filters

3. Select the appropriate connection you have to the student and the current term.
4. Place a check in the box to the left of the student's name, and then click on Note.

OVERVIEW **MY STUDENTS** TRACKING

Search
Connection
Term
Cohort
Additional Filters

<input type="checkbox"/>	Name	Success Score	Email	Phone	mobile
<input type="checkbox"/>	 Albright, Randi 9931-89SF	46	ralbright@exellent.edu	888-555-1212	

You should see a dialogue box like this:

Create Note

* **Note Type**

* **Date**

Subject

* **Note**

Send copy of note to yourself

Send copy of note to student

* **Note Sharing** Shared Private

Note Permissions: A note type must be selected to determine sharing permissions for this note.

* **Required fields**

5. Take the following actions in this dialogue box:

- Choose a “note type” for the pull-down menu*
- Specify a subject

- Write the note
- Check Shared (if you want other instructors/advisors/staff to see this) or Private (for just you)
- Place a check in either or both boxes to send a copy of the note to the student and/or yourself

- Click Submit. That's it!

If you want to see a student's notes, including this one:

- Click on the student's name in your list of students (see #3, above)
- Click on the Notes tab in the resulting student's screen
- Additional Questions? [Starfish Support & Feedback](#)