

Academic Advising Notes Guidelines

Academic Advising notes are considered part of a student's "educational record" and fall under FERPA guidelines. Under FERPA, students may request access to view their educational records and/or request to share their records with other parties.

Need for Advising Notes

A concise summary of substantial contacts between advisor and advisee creates a record of advising progress. It increases the efficiency of advisors, documents key interactions and referrals, and provides reference for students, other staff or future advisors.

Best Practices of Advising Notes

- Include information and language with the view that it could potentially be viewed by the student, parents, and other advisors/administrators.
- Keep it simple and concise; summarize any general topics discussed as well as next steps for student and/or advisor.
- Stick to observations and descriptions instead of subjective judgements. Avoid "lazy, rude, unmotivated, clueless" as well as student evaluations of other advisors, faculty, staff, students.
- When students disclose personal, sensitive, or confidential information use generic descriptions for the discussion such as "personal issues," "difficult situation" or "extenuating circumstances." Specifically do not include details referencing crimes, sexual assault, medical or mental health diagnoses.
- Document any referrals made, whether provided to student, made with student, or on their behalf.
- *Medical documentation should not be kept in the advising file.* Laws protect the confidentiality of medical records and should not be included in the file, an educational record subject to FERPA.
- Advisors may keep a personal, handwritten file on students that is not considered part of the educational record and for that advisor's reference only. These must be kept secure and destroyed when no longer needed or upon student graduation.

Electronic advising notes

Advising notes should be entered in Beacon as an "[Update](#)."

- *Students should have at least one advising summary note per term.* After advising in preparation for registration, include a summary with recommended courses, significant topics, recommended next steps, and resources.
- Advisors can enter an Update (advising note) at any time.
- Advising notes will only be viewable by the assigned advisor and any connected support staff (coaches, PDSO, Student Success Dean and Director).
- DO check the box to copy student so they receive an emailed copy of the advising summary note.