

Banner SPACMNT

Best Practices for Writing Notes and Documenting Contacts

All information entered into Banner becomes part of the student's official educational records and are therefore governed by the Family Educational Rights and Privacy Act (FERPA). Information maintained about a student, including advising notes, are part of the students' educational record; students have a right to inspect and review their educational records, meaning a student could request to review information contained in advising notes.

For this reason, advisors should utilize advising notes in a manner consistent with their stated purpose, be brief and relevant. The details you include should be specific enough that you and other advisors understand the student's circumstances but do not include sensitive or personal information about the student.

With this in mind:

- Assume students, parents, or the general public will read anything and everything you have written. When writing your notes, ask yourself the following questions:
 - Is this something the student would want other people to know?
 - Is this something another advisor would need to know? Why?
 - Is this something that is within my scope of practice to say?
 - (i.e., Do I have the necessary training, and is this something germane to my area of professional expertise?)
 - Are the details in my notes based on fact? Or, do they merely represent my own observations, perspectives, guesses, predictions, diagnoses, etc.?

TYPES OF COMMENTS/NOTES TO RECORD IN BANNER:

1) Recommendations:

- Include information that will help the advisor recall specific advising information.
 - Indicated interest in Chemistry as major; recommended student enroll in CHEM 1113/1111 for Gen Ed Physical Science

2) Advice and/or Consequences of Not Following Recommendations:

- Include information shared about possible consequences of not following the given advice.
 - Cautioned student against 18 hours due to work and activity schedule
 - Reviewed course sequencing; explained ART 1213 Drawing I and 1233 2D Design must be taken early as they are pre-requisites for most other art courses.

3) Referrals:

- Include Referrals of a non-sensitive nature. Exclude specifying Referrals of a sensitive or personal nature
 - Non-Sensitive: Referred to Career Services, Faculty Mentor, Athletics, etc.
 - Sensitive/Personal: Referred to Health, Counseling, Disability Services, Shelter, etc.

4) Request for Action:

- Information that reminds you to follow up with the student about the action they took.
 - Requested student speak with faculty mentor about internships
 - Student plans to begin utilizing tutoring; scheduled follow up appointment after mid-terms

5) Info for Other Advisors

- Notes to help future advisors understand the recommendations you gave, the student's goals, or that other advisors can follow up on
 - Reminded student to submit official transcript from TCC asap.
 - Explained general education courses and special requirements for Health Science students
 - Student intends to go to Nursing school. Is only taking prerequisite courses at NSU to get admitted there

ADVISING SCENARIOS AND NOTE WRITING EXAMPLES

SCENARIO	DO	DON'T
You are calling advisees who have not scheduled their advising appointment.	I left student a voice message at 2:40 p.m. on 3/11/2018 at the primary number on file, asking them to contact me ASAP regarding fall advisement.	Called student.

<p>Student attends advising appointment with parent. Student requests that parent stay. Parent dominates the appointment, even as you direct your conversation to the student.</p>	<p>Student and parent appeared on time for advising appointment. Parent took active role in selection of program and classes. Advised student to refer to degree requirements when selecting coursework.</p>	<p>Student came in for advising with his helicopter mother. Meeting was terrible because mother kept butting in. He needs to grow up and take the classes he needs.</p>
<p>Student visits you to drop MATH. Wants to know who an "easy," instructor is for next time.</p>	<p>Student dropped MATH 1513. Referred to on campus and online tutoring services. Recommended alternative Math course applicable to degree plan.</p>	<p>Student dropped MATH due to unfair grading policies of instructor. Recommended easier Math.</p>
<p>Student wants to discuss their grants, loans, and scholarships. You determine they have not applied for any financial aid.</p>	<p>Referred student/walked student/helped student call Financial Aid Services for questions. Also gave contact information for Bursar's office and other appropriate offices.</p>	<p>Got a call from student wanted to know where Financial Aid (FA) refund is at. I told her ask them not me because I'm not in FA. (Note: clear abbreviations are important)</p>
<p>Student visited with you about a medical issue that is affecting their class attendance / participation.</p>	<p>Student has ongoing personal issue that impedes academic success. Referred to appropriate campus resources.</p>	<p>Student is pregnant with triplets that requires frequent hospitalization, and caused her to miss a week of class already. I'm really worried about her health, I hope she'll be okay.</p>
<p>Student needs course substitution due to required course not offered during graduation semester.</p>	<p>Received pre-approval for BIOL 4154 to substitute for BIOL 3224 after student completes current semester per Dr. Smith 08/17/18.</p>	<p>Sub BIOL 4154 for BIOL 3224 after Fall semester IF student can pass it.</p>