Electronic Advising Notes: Who needs file cabinets anyway!
History

• No central repository for student advising records
• Lost files and inefficiencies
• Wasted space and wasted resources
Purpose of Advising Notes

• Documentation
• Context and history
• Opportunities
• Information Sharing
• Tracking
• Ongoing Assessment
General Content and Guidelines

How do your notes contribute to the holistic record of a student’s academic and career pathway?

• Focus on facts and events
• Include relevant information
• Comment on courses
• Be clear about the hypothetical nature of your conversations
General Content and Guidelines

How do your notes contribute to the holistic record of a student’s academic and career pathway?

• Document discussions

• Cite actions

• Include referrals and context

• Document communication outside of the appointment
General Content and Guidelines

How do your notes contribute to the holistic record of a student’s academic and career pathway?

• Note transitions

• Note exceptions

• Note stated decisions

• Note opportunities
General Content and Guidelines

How do your notes contribute to the holistic record of a student’s academic and career pathway?

• Document attributes disclosed by the student

• Note reminders

• Document relevant email contacts

• Use caution when noting changes in behavior or concerns
Areas of concern

• Use appropriate phrasing

• Do not include info about other students

• Use caution when documenting referrals or personal/sensitive information

• Do not diagnose, assess or offer judgement
Areas of concern

- Document referrals to other offices...
- While using discretion as to why the referral is needed
- Make no promises
Title IX and child abuse

• As employees of an Idaho institution of higher education, we are required to report incidents of child abuse

• Title IX requires Boise State to respond to harassment on the basis of sex

• Do NOT promise confidentiality to the student
FERPA

Family Educational Rights and Privacy Act protects the privacy of student records and how information is used.

Students can request to view advising notes under FERPA and must be granted access within 45 days of the request.

Records can also be subpoenaed. Any and all legal request for student records must be referred to the Office of General Counsel.
THANK YOU

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