

# Advising Reports

## Adding a Report on Advising

By starting a scheduled appointment or creating a "Report on Advising" from a student's page, you will pull up an advising report.

### Reason

Select the reason or reasons that reflect the advising conversation. If the appointment was scheduled for one reason, but you discussed something else, you can change it here or add other reasons. Reasons are grouped and then listed alphabetically. For a full list of reasons and what these reasons mean, please refer to the "Advising Reasons" document on the [SSC website](#).

### Meeting Type

Select the appropriate type of meeting: Email, Phone, Scheduled, Virtual/Online or Walk-In.

### Location

The location is the general area you associate yourself with for the advising you are doing. It is not your physical location.

### Attendees

You will see both you and the student here. If the student did not show, you would uncheck the "Attended" box.

### Appointment Summary

Enter any notes pertinent to your advising interaction. The summary should represent your conversation, particularly with regard to guidance or advice given. Remember that Advising Reports are shared with all advisors who have access to this student's record. This is especially helpful when students declare a major and switch to a new advisor or when a student is a double major and has multiple advisors. Recognize that advising reports and notes are considered part of the student's educational record as defined by FERPA and that students can request to inspect their educational record. Educational records can also be subpoenaed.

### Appointment Summary Guidelines

- Record information that is clear, professional, and relevant. Advising reports and tutoring reports provide a summary of meetings with students. Documentation should be objective, concise, and void of judgements or value statements.
- Include information in advising reports, tutoring reports, and notes which will be helpful during future appointments with the student, this includes documentation indicating policies, procedures, requirements, deadlines, etc. shared with the student.
- Focus on information pertaining to the student's academic progress, situation or questions. Details regarding medical, personal, or other sensitive issues should be avoided.

### Suggested Follow-up

You can indicate a follow-up time, but it is only a suggestion and found in the advising report.

### Attachments

If you reviewed a document or created a semester by semester plan, you may wish to upload it here. This will be viewable only to you and other advisors, not the student.

ADVISING REPORT FOR KEN KIRKPATRICK

Appointment Details  
An appointment will be created after you submit this report.

Reason:  
 Academic: Course Schedule

Meeting Type:  
Select Meeting Type

Course:  
[Dropdown]

Date of visit:  
10/25/2016

Location:  
[Dropdown]

Attendees

**Kate Knaul**  
7656584371  
Administration, Advisor, Professor,  
Super User  
 Attended  
Arrived: 11:43 AM Departed: [Time]

**Ken Kirkpatrick**  
7656584141  
Administration, Advisor, Professor,  
Student, Super User  
 Attended  
Arrived: 11:43 AM Departed: [Time]

Suggested Followup  
This will be saved on the report as a suggestion. No appointment will be created.  
Date: [Date] Time: [Time]

Appointment Summary

Attachments  
Attach File  
Choose File No file chosen

Save this Report

## Recommendations for Writing Advising Reports

- Write notes as soon after the appointment as you are able – within 24 hours is best. Alternatively, leave a few minutes at the end of each advising appointment to enter your summary into SSC.
- Include information that will help you to recall the conversation at a later time.
- Include any referrals to campus offices, staff/faculty, or resources.
- Provide an objective assessment of the student's disposition, if relevant.
- Do NOT include any information that you would not want the student to read.
- Encourage students to take responsibility for taking their own notes during the meeting.

The [Family Educational Rights and Privacy Act \(FERPA\)](#) affords guarantees certain privacy rights for students regarding access to their educational records as well as protections from unauthorized publication, release or examination of these records by others. Therefore it is important to use discretion and not share sensitive information within the advising report.

**Advising Reports** help advisors maintain an accurate record of advising, referrals, and recommendations. Advising notes, whether or not they are entered into SSC, become a part of the students' academic record and are subject to FERPA protections. Advisors should ensure that notes are complete, professional, and able to be reviewed by the student, other assigned advisors, and/or other campus professionals, as required. Notes entered into the system should be brief, academically-focused, and understandable when read individually. Below are examples of what to include and not to include in a note.

### Sample Advising Reports

1. *Met with James today to discuss possible change of major to Actuarial Science. We reviewed requirements for the major, as well as his grades so far in related courses. He plans to take the two prerequisite courses this spring and I think he will still have room in his schedule for timely completion because of his AP credit.*
2. *Alicia made an appointment for today to discuss her struggles in her language course. She reports feeling very nervous about her ability to raise her grade. We reviewed her grades so far and discussed tutoring options. We made plans to meet again in two weeks, so that she can review her progress before the withdrawal deadline. I informed the student that after 9/1, she can no longer make adjustments to her schedule.*

### Inappropriate Statements in Advising Reports

1. **Personal judgments or editorial comments about the student, especially when negative.**  
DO NOT WRITE: Sam is not strong in math or sciences, but thinks he may want to pursue engineering in grad school. This will never happen!  
DO WRITE: Encouraged Sam to continue career and major exploration process due to current grades in math and science.
2. **Comments regarding student's instructors, especially when negative.**  
DO NOT WRITE: Sally is planning to drop XYZ230, because she does not like the instructor's teaching style.  
DO WRITE: Discussed different teaching and learning styles and effective strategies for XYZ230.
3. **Details about a student's medical or mental health or possible diagnosis.**  
DO NOT WRITE: Joe told me he has bipolar disorder and will be out of school having treatments.  
DO WRITE: Joe is planning to withdraw from Fall 2016 courses due to medical issue.
4. **Details about student's personal hardships or concerns.**  
DO NOT WRITE: Susie reports feeling upset about breaking up with long-time girlfriend.  
DO WRITE: Susie discussed personal challenges. Referred her to Counseling Center.

An additional handout on advising best practice can be found on the DePauw Student Success Collaborative website: <http://www.depauw.edu/ssc>