October 2015

**Advising Files: Best Practices for Documentation and Student Services**

Documentation is crucial in the advising relationship. Documentation allows for advisors and students to remember past discussions and action items and serves as an official part of the student’s record. Students can request the documentation at any time and it is subject to subpoena, so records are carefully kept. FERPA also protects the confidentiality of these records. Advising records can be shared with individuals at the institution who have an educational need to know.

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| **Item** | **Elements** | **Notes** |
| **Emails** | * Responses to questions
* Summary of plans
* Call to action
* Registration information
 | Requests to schedule a meeting are not part of the official file.Exception: summary email documenting multiple attempts to contact with no response. |
| **Advising Notes** | * Suggested courses
* Referrals
* Memory Joggers
* Career interests/plans
* Student action items
* Advisor follow up items
* Notes on paperwork needed/completed
 | The notes are written with the student as the audience as they are for the student.Notes should be objective and factual. **Use this to document student interaction (meetings/phone calls/video chats, etc).** |
| **Planning Sheets** | * All courses, all credit numbers, semesters taken or planned to be taken
* Disclaimers
 | Be as thorough and detailed as possible. Always note that these are unofficial documents. STAR is the official document. |
| **STAR** | * GPA
* USP
* Degree Requirements
* Major/Minor/Emphasis Requirements
* Graduation Requirements
 | Only saved in the student file when questions/possible errors/unique circumstances that you want to be able to reference later. |

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# Key Questions Crucial to Advising

1. What’s on the agenda for today’s meeting?
2. Career Goals: What are they? Have they changed?
3. Exploration: In what ways does this major fit your career goals? What electives interest you? What professional development opportunities are available? Are you considering graduate programs or additional certifications?
4. What requirements remain? Do we need to adjust any of your plans?
5. What might be happening at work or home next semester that should be considered in planning your schedule?
6. Courses for next semester: What courses have you identified? Do you have any ideas? What did we plan last time?
7. What resources should you utilize to be successful?
8. What do you need to do to be prepared for the next steps? (Discuss actions and next steps) *Notes should clearly explain what a student needs to do so that the student could look at it months later and still be able to execute the task.*

Wrap up the advising appointment with notes about what the student will do and what the advisor will do. Set expectation for next meeting/contact.

# Self-reflection questions for the Advisor

As you finalize your notes, these questions can help you remember the goals of advising as a collaborative teaching and learning process, with shared responsibility between advisor and student.

1. What would a different advisor need to know? Is that clearly documented and easily understood? Is it written in a way that is appropriate if it were requested by the student or the court?
2. Did this interaction accomplish the goals of teaching a student about their academics?
3. Am I doing something for the student that they can and should do for themselves?

**Best Practices Certificate – Advising as Teaching**

Spring 2016 Sessions:

February 16, March 1, March 15, April 5 and April 19

3:00 p.m. – 4:30 p.m.

Please watch for an email from CETL in January for more information.

Advising is an integral part of our teaching mission. This Best Practices Certificate will provide an opportunity for instructors to explore new ways to bring together teaching and advising. Sessions will focus on such topics as relationship building with students, the use of advising technology, and understanding student needs. Sessions will be presented by UARC advisors in collaboration with other experts on campus. Participating instructors will receive a $500 stipend.

**Enrollment Appointments for Spring 2016:**

Seniors 90+ credits begin on September 28

Juniors 60+ credits begin on October 12

Sophomores 30+ credits begin on October 23

Freshmen 0-29 credits begin on November 4

**The UARC welcomes new academic advisors to our staff:**



Meredith Koski, M.A.

College of Letters and Science



Kimberly Vandehey, M.S

College of Nursing



Jennifer Woelfel, M.A.

College of Education and Human Services