

Note-Taking Best Practices

Why Maintain Advising Notes?

Maintaining records of interactions with students is important for a variety of reasons:

- **Personalized and Consistent Support:** Notes help tailor guidance to each student and ensure continuity if advisors change.
- **Accountability and Compliance:** Documentation shows that advising is taken seriously and meets ethical, legal, and institutional standards.
- **Informed and Proactive Advising:** Thoughtful documentation reveals patterns and context that help advisors make better decisions and provide timely, effective support for students.

FERPA & Advising Notes

[FERPA](#) is a federal law that protects the privacy of student education records. Students have the right to request access to these records, which may include advising notes. Although FERPA was established in 1975, prior to the use of digital advising systems, it still governs how student information is documented and shared today. Because of this, advisors should assume that any notes entered in GPS, whether shared with others or marked as private, may be considered part of a student's education record under FERPA. As a result, advisors should use discretion when documenting notes in GPS. **All notes, including those marked as private, should be written in a professional, objective manner, and free from personal judgement or speculation.**

When to share and when not to share in GPS

GPS allows you to limit note visibility to only you by unchecking the "All staff with access" box. Before logging a shared note, ask yourself:

- What is the purpose of sharing this note? Will the information I record be helpful to others in the future?
- Would the student be okay with me sharing this information with others?

Include in a shared note:	Include in a private note:	Never include:
● Factual information relevant to the student's academic/co-curricular progress ● Advisor guidance or recommendations made ● Referrals to resources ● Key advising outcomes and next steps	● Medical details that will be helpful context for future conversations ● Specifics of a student's personal concern	● Subjective judgements (e.g., "lazy", "unmotivated") ● Speculations or assumptions about behavior

What to Include in a Shared Note:

When in doubt, leave it out!

Topic	Examples
Factual information relevant to the student's academic/co-curricular progress	"Student is considering MEng and had questions about the application process and timeline." "Student is considering dropping 14.01 after receiving midterm grade. Reviewed drop deadlines and discussed strategies to improve performance." "Alex is in the process of applying to UROPs and internships for the summer." "Katherine and I discussed discussed graduate thesis timeline and upcoming milestones"
Advisor guidance or recommendations made	"Student proposed 4-course load alongside RA responsibilities. Advised to consider reducing to 3 courses to maintain balance and allow time for research." "Emily reported she wants to wait until senior year to take her science GIRs. Recommended she reorganize her plan of study to make room for GIRs earlier on."
Referrals to resources	"Student reported personal concern that is affecting his academics. Referred to S3 for additional support." "Student shared personal circumstances affecting ability to focus on research. Reviewed short-term academic adjustments and referred to OGE for additional support." "Student is looking for help with cover letters. Showed him resources on CAPD website and how to make a Handshake account."
Key advising outcomes or next steps	"Student will follow up with me after his next exam to determine whether or not he will drop 14.01." "I will send a follow-up email introducing the student to Dominique in UROP."

What to Include in a Private Note:

Topic	Examples
Reminders to yourself	“Sophia’s parents are going through a divorce- check in about how she’s doing during next meeting.” “Theo reported that his partner broke up with him in September and he’s been feeling really low. Check in during next meeting.”
Notes on advising style or your personal approach with the student	“Student seems uncomfortable opening up- start next meeting with a few low stakes questions or personal anecdote.” “Lana is extremely talkative and has trouble staying on topic. Gently remind her that we have 30 minutes for our appointment and can schedule a follow up if needed.”
Observations or reflections that aren’t appropriate to share or don’t need to be part of the record.	“Student reported that he was recently diagnosed with ADHD. Has already connected with DAS and has accommodations in place.” “Student appeared unkempt and tired. Is getting support from SMHC and S3, but would be good to check in again soon.” “Student was visibly upset and cried throughout our meeting. Reported a recent fight with her boyfriend and is worried they will break up soon. I plan to send a check-in next week.”