

Advising Notes

The purpose of using electronic note-keeping systems, accessible to offices and college personnel working with students, such as academic and faculty advisors, is to provide a record of advising contacts, information discussed, and advice provided. In addition, notes are also an educational tool to help students with managing advice given as they progress through their academic plans. Notes can be subpoenaed. Notes are part of a student's educational record to which a student has a right of access. FERPA rules apply to advising notes.

Hunter College has three note-keeping systems as of March 2020: Degree Works, MyAdvisor, and Hunter Navigate.


- Degree Works URL:
<http://www2.cuny.edu/about/administration/offices/registrar/resources/degreeworks/>
- My Advisor URL:
www.hunter.cuny.edu/myadvisor (December 2017-March 2020)
- Hunter Navigate URL:
www.hunter.cuny.edu/navigate (March 2020-present)

Degree Works

Notes in Degree Works are visible to students and personnel with access to the system. These notes should be brief and only contain information about the academic plan. Appropriate topics for notes in Degree Works include:

- Specific course selection possibilities discussed during advising sessions.
- Referrals to major advisors or other offices involved with academic matters.
- Instructions to apply for graduation via degree audit, etc.

Any notes you add in this system will be tagged with your name and the date posted. You may modify or delete notes you wrote as needed.

 **Tip:** Write and save separate notes about different subjects, so if you want to delete a note about something in particular in the future, you can do so without losing the other information contained in one long note.

My Advisor and Hunter Navigate

Notes in MyAdvisor and Hunter Navigate are visible to personnel with access to the system, including academic and faculty advisors. Beginning in March 2020, advisors will use Hunter Navigate for notes. MyAdvisor will serve as the repository for notes from December 2017 to March 2020.

Hunter Navigate

Notes in Hunter Navigate are visible to personnel with access to the system, including academic and faculty advisors. Notes in this system should describe the advising session or contact. Notes should be brief and include information discussed, advice given and contextual information, including:

- Information about the student's academic goals
- Information that may facilitate the relationship with the student
- Advice given and consequences of not following given advice
- details about agreed-upon follow up actions
- Referrals of non-sensitive nature
- Comments helpful for future interactions with the student, including reference letters, etc.

Notes are important because they create a record of contacts. The record helps advisors achieve efficiency and a higher degree of personalization through memory recall and integration of advising contacts the student has had in the institution. Notes communicate critical information to other personnel involved in advising. In addition, notes ensure advisors are consistent with information discussed verbally and in writing, which helps with communicating in a factually accurate and appropriate manner.

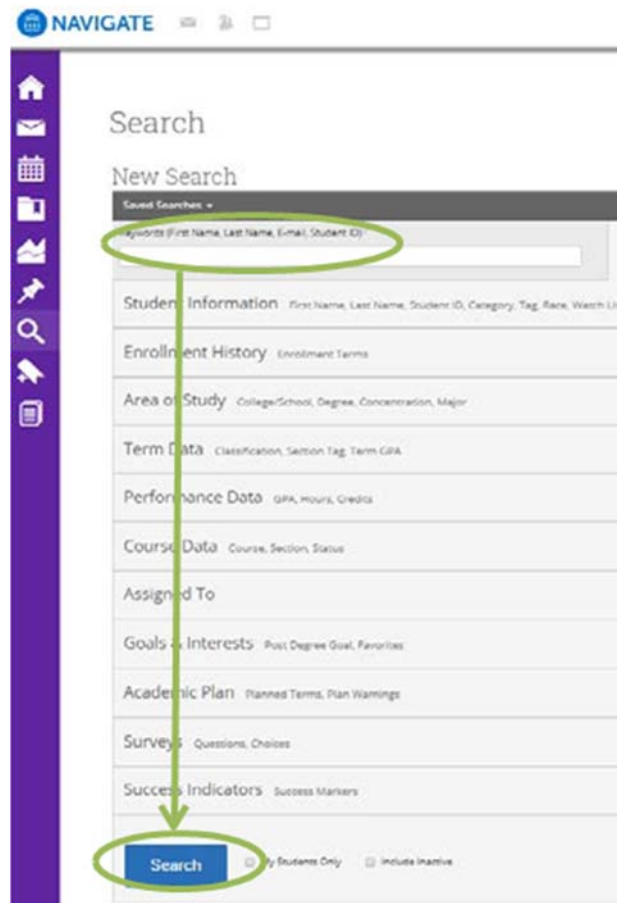
General Rules for Notes:

- Write and save the notes soon after the advising session or contact with the student.
- Describe, do not evaluate or judge.
- When writing a note, keep it simple and avoid uncommon or obscure abbreviations.
- Do not note a student's conduct actions, BRT history, disability and/or medical information, law enforcement records, or employment records unless the student specifically requests that information become part of the educational record.
- When in doubt, leave it out.
- When composing notes, ask yourself would you send these notes directly to the student or his/her lawyer?

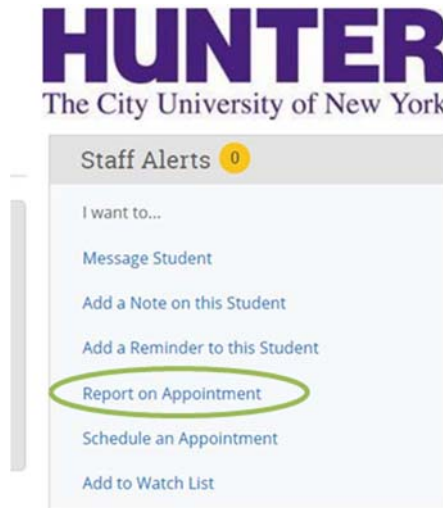
Adding Advising Session Notes in Navigate

Locate the student record:

1. Do a basic search and access student record through appointments.



2. Once in the student's record, go to the right-hand menu and select **Report on Appointment**.



3. Complete the answers to the questions under **Appointment Details**.

- Add in Date of visit, start, and end times.
- Be sure to check the Attended boxes.

The image shows a screenshot of the Hunter University Appointment Details form. The 'Appointment Details' tab is circled in green. The form includes several sections: 'Appointment' (02/04/2020 5:00p-5:30p - Academic Planning), 'Care Unit' (Academic Advising), 'Location' (Office of Advising - 1119, East Building), 'Service' (Academic Planning), 'Course' (Start typing to search all courses), 'Meeting Type' (Select Meeting Type), 'Date of visit' (02/04/2020), 'Meeting Start Time' (5:00pm) and 'Meeting End Time' (5:30pm). Below these are 'Attendees' listed as Maureen O'Connor, Advisor. To the right, there is a 'Summary Details For' section with 'Next steps for Student' and 'Next steps for Advisor' fields. Below that are two questions: 'Student is on track to graduate in time.' and 'Student expressed an interest in transferring or withdrawing from Hunter.', each with radio buttons for Yes, No, and N/A. The 'Appointment Summary' section has a rich text editor with a toolbar and contains the following text: 'Junior student. Sarah is majoring in PSYCH. She is on track to graduate in Sp21. We reviewed her record, discussed degree requirements and audited HCR. She wants to take SPAN101 and 102 for her Focus-FLANG requirement. We went over her major. I referred her to the PSYCH advisor for major advising. We discussed her plan for completing her remaining courses in sequence so she can graduate on time.'

4. Add advising notes under **Appointment Summary**.
 - Attach documents if necessary.

The screenshot displays the 'Appointment Details' and 'Summary Details' sections. The 'Appointment Details' section includes dropdown menus for Appointment (02/04/2020 5:00p-5:30p - Academic Planning), Care Unit (Academic Advising), Location (Office of Advising - 1119, East Building), Service (Academic Planning), Course (Start typing to search all courses), Meeting Type (Select Meeting Type), Date of visit (02/04/2020), Meeting Start Time (5:00pm), and Meeting End Time (5:30pm). The 'Attendees' section shows Maureen O'Connor as the Advisor. The 'Summary Details' section includes 'Next steps for Student' and 'Next steps for Advisor' with radio button options (Yes, No, N/A). The 'Appointment Summary' text area is circled in green and contains the following text: 'Junior student. Sarah is majoring in PSYCH. She is on track to graduate in Sp21. We reviewed her record, discussed degree requirements and audited HCR. She wants to take SPAN101 and 102 for her Focus-FLANG requirement. We went over her major. I referred her to the PSYCH advisor for major advising. We discussed her plan for completing her remaining courses in sequence so she can graduate on time.'

5. When your notes are complete, click **Save this Report**.

Adapted from:

Guidance on the content of undergraduate advising notes at the University of Notre Dame. Retrieved from <https://registrar.nd.edu/pdf/esf-guidance.pdf>

Guidelines for advising notes. Retrieved from <https://www.missouristate.edu/assets/advising/AdvisingNoteGuidelines.pdf>

Introduction to electronic advising notes. Retrieved from <https://usm.maine.edu/sites/default/files/facultycommons/Electronic%20Advising%20Notes%20Training.pdf>

Recording advising reports and notes: RU-N4Success EAB Student Success Collaborative. Rutgers University. Provided by EAB Navigate. Retrieved October 2019.