

University College Guidance on Documenting Student Interactions

Purpose

The goal of taking notes to document student interactions should include details that allow for the following:

1. **Continuity of Service** – Enough information or detail that another advisor can understand a student’s challenges or needs and what you have either done or recommended that the student do in order to address these.
2. **Protection for both the Advisor and UC** – Enough information or detail that provides sufficient documentation that the advisor competently addressed student questions and discussed relevant options and consequences of student decisions and behavior to support that student was made aware of university policies and process.

Expectation

In addition to selecting appropriate check boxes, each visit should include some relevant text note that provides a synopsis of the meeting. **Expanded check boxes are intended to cut down on the amount of notes but not necessarily to replace them all together.** If you find that the check boxes adequately describe the topics discussed, please include a statement to the effect that either there were no additional policies/consequences that required discussion or a statement to the effect that relevant policies/consequences were discussed. Again, statements like this and the level of detail you choose to provide primarily serve to protect you in cases involving student disputes.

Meeting Purpose and Common Data Elements

Regardless of personal style and preference, your notes should include consistent data elements relevant to the purpose of the meeting. The table below provides general guidelines based on what the majority of UC advisors typically include in their notes for different types of meetings.

Advisor Meetings			
	Meeting	Purpose	Data Elements in Notes
1st Semester Student Assigned	Initial	Developmental; Discussion of Goals (Advising and Individual); Major/Career exploration; prep for registration (Placement exams, unposted AP/CC credits).	<ol style="list-style-type: none"> 1. Description of student goals/plans; 2. Any personal detail that stands out or any info that may be a risk or potential issue (freshman lives off campus); 3. Issues and Action items for student follow-up; when appropriate, reference to relevant policies/consequences for action/in-action on topics discussed 4. Resources referred/provided

	Fall Only- Early Alert Surveys	Follow-up Retention Risk Factors	<ol style="list-style-type: none"> 1. Discussed specific risk factors; 2. Resources referred/provided; 3. Issues and Action items for student follow-up; when appropriate, reference to relevant policies/consequences for action/in-action on topics discussed 4. Continued risk/need for monitoring or follow-up
	Registration	Major discussions; Course selections; Mid-term Grades; Follow-up Retention Risk Factors (FYS)	Redesign of registration form?
	General/Drop-in	Major/Career exploration; Study Abroad; Special cases W, Add/Drop, etc.	<ol style="list-style-type: none"> 1. Description of meeting purpose; 2. Issues and Action items for student follow-up; when appropriate, reference to relevant policies/consequences for action/in-action on topics discussed 3. Resources referred/provided
	Academic Interventions (Probation/Dismissal/Contract)	Notify students of status, policies and process; monitor/document ASA compliance	<ol style="list-style-type: none"> 1. Issues and Action items for student follow-up; when appropriate, reference to relevant policies/consequences for action/in-action on topics discussed 2. Resources referred/provided
2 nd or Subsequent Semester	General/Drop-in	Major/Career exploration; Study Abroad; Special cases W, Add/Drop, etc.	<ol style="list-style-type: none"> 1. Description of meeting purpose; 2. Issues and Action items for student follow-up; when appropriate, reference to relevant policies/consequences for action/in-action on topics discussed

			3. Resources referred/provided
	Registration	Major discussions; Course selections; Mid-term Grades; Degree Audits	Redesign of registration form?, Action Item Major Declaration
	Academic Interventions (Probation/Dismissal/Contract)	Notify students of status, policies and process; monitor/document ASA compliance	3. Issues and Action items for student follow-up; when appropriate, reference to relevant policies/consequences for action/in-action on topics discussed 4. Resources referred/provided

Examples of Notes by Meeting Type

Initial – Primarily developmental but may be appropriate to discuss action items for registration meeting (submit AP/transfer credit, placement tests, etc.)

“Initial meeting-"Pete" is adjusting well and likes UNCW. He loves living in Hewlett and feels connected to campus. Very social. Likes Wake Boarding and plans to join the "Ducks Unlimited" club. Is considering BUS (ENT) but truly is exploring. Has CC credit not posted yet, advised to request transcript to registrar. Did some major exploration...”

“Student is pursuing Marine Biology. Living off campus and was struggling with bus schedule. Became familiar with Point-to-Point (1 mile radius transportation)”

“We talked about her major (maybe History, maybe Film Studies), how advising works, etc. She seems to be adjusting well to UNCW.”

“Name is pronounced KIRA. Nursing major. Looking into scholarship opportunities. Plans to continue with SPN, advised to take placement test before pre-reg apt”

“Meet and Greet. Things are going well. UNCW first choice - both parents went here. Already using Math Lab! BUS major.”

“From Ahoskie, NC, Rec. Therapy major, wants to be Pre-PT, wants to study abroad, advisor showed her four year plan for RT and suggested going abroad sophomore year, sent her four year plan, pre-professional website, and Pre-PT Class Recommendations.”

“Student is from Cary, NC. He is currently living in the Apartments and all his roommates are sophomores, which is disappointing to him. He says they are nice but all have their own thing going on now. He says he has a great RA and a great Link and between the two of them, he is going to activities to help get out and meet other people.”

“From Jacksonville, NC, Undecided, interested in Business, thinking about taking more classes, perhaps could be undecided, will let advisor know.”

Early Alert – What risk was addressed, on-going concern for follow-up?

“FFYSS no response - just forgot to take the survey - no concerns related to survey risks. Overall, feels like she is adjusting well, does occasionally miss her family but not in a limiting way.”

“Student showed up on the BSS survey with three areas flagged - academic confidence, graduate from UNCW, and family support. Part of her issue with academic confidence is that she struggles in the math and the sciences, but is very strong in the humanities. I showed her the Math Lab before she left. As for why she isn't confident about graduating from UNCW: the biggest part of that is her reason for being here - because she didn't know what else to do, and to get away from her family. We talked about whether or not having distance might help, and I also talked with her about the Counseling Center as a resource if things didn't seem to improve. On the positive side, she loves her roommates and dorm life, and she is enjoying her HST class. She hates UNI, though, and says her instructor is a grad faculty member who has never taught it before and is really hard to understand.”

“FYS. Student is primarily concerned about the BIO lecture class - she's never had such a large class and feels like that makes it difficult for her. She also admitted she did not prepare as much as she should have for the last exam but has a plan to improve prep for next week's test. Advised learning center services, both study skills aids and tutoring if she needs it - will follow up if her stepped-up study plan doesn't go well next week.”

General/Drop-in/Registration with Services

Add/Drop/Withdrawal/General Schedule Change –Does it affect full-time status, is it a required course for US or major? How will it impact 16-credit withdrawal limit? Is this a prerequisite course that will interfere with degree progression?

“dropped BIO 201 and now at 9 hours, not an issue because student no longer needs science class because she changed majors, she is willing to take a summer class, discussed consequences of dropping below full-time (insurance, financial aid, housing – she's off campus).”

“Concerned about back to back schedules T/R - swapped out US reqs in AIL category”

“Email contact with student in response to his inquiry re withdrawing from class. Student withdrew from MUS 106 having missed an exam that would significantly lower his grade. Bringing in 6 AP credits + 12 remaining fall 2016 credits will keep him on track.”

Major Declarations – What major? Next steps in declared college/dept, Degree Audit, etc.

“Discussed Exercise Science Major and pathway to PT. Ran degree audit and reviewed remaining requirements. Declared. Recommended reaching out to new advisor when assigned for info on their advising process.”

“Declared pre-nursing: 49 hours and a gpa of 3.680. This is for pre-nursing. Advised to go to the student success center for advising for eventual application to the School of Nursing. Also look to the web page for the School of Nursing to find out the requirements for the Prelicensure program admissions.”

Major Explorations

“Student is leaning more towards Business but also still considering SPEC ED. She placed into MAT 105, discussed MAT reqs for business and advised to do my math online ASAP to be able to start MAT 111 in spring. Suggested courses to help decide (EDN 200), advised to wait on UHIB if continuing with BUS.

“Student is debating between CRM, PSY, and/or a BUS major with a minor in forensics. She is eligible to declare her major but I wanted her to visit the career center first because the Kuder journey may help. Student needs to take the SPN placement exam as well.”

“Confidential”

“Student having difficulty dealing with personal relationship. Student open to help - Referral made and walked. Amy Hector notified.”

“Student & mother stopped by UC. Student involved in life threatening accident this past summer. Hoping to return either in spring 2017 or fall 2017. From CT. Referred the family to the following:

- Student Health-they had questions on the health insurance. He currently has the school health insurance.
- Financial Aid-questions regarding future aid, scholarships and also what happens if he takes classes in CT. Gave them the FA bookmark.
- Shared w/him that he needs to work w/his advisor both if he is returning or if he is taking courses in the spring in CT. (pre-registration vs. transient study form)
- Reviewed the deadlines and website for re-enrollment if he comes back after the spring.
- Shared w/them Amy Hector’s role as a case manager. When returns may met w/her once to make sure transition back to the university is going well and make sure he is connected to the proper resources if needed.”

Study Abroad

“Student wanted to check schedule for next term to make sure she was on the right track with courses and discuss possibility for study abroad - courses all work towards requirements for US and major, referred to OIP and process for selecting programs, discussed timeline reqs for education degree.”

Transfer Plans – Why, where?

“has applied to NCSU for spring for Vet program”

“Student came to discuss transferring to either NC State, UNC Charlotte, or UNC Chapel Hill for the Fall 2017 semester. Reviewed transfer admission criteria and double checked next semester's schedule.” Student wanting larger school.

“Student shared that things are not going as well as he would like at UNCW. He is having roommate issues, and is struggling academically. Furthermore, despite joining clubs (Hawkstream, College Republicans, and Cru) he still doesn't feel connected. In addition, it will be much cheaper for him to attend Randolph Community College at home. We discussed possible solutions but he was adamant about transferring. There is a possibility that he will return so we discussed the transient study form and policy about returning to UNCW after 1 or 2 semesters.”

Academic Probation/Dismissal

“Called student on 12/15 and left voice mail. Called student again on 12/20 and talked about Academic Probation and suggested schedule changes.”

“12/20/16 Phone conversation to discuss dismissal from university. Student on contract for fall 2016 and did not reach required 2.0 for eligibility to continue. Has already registered for two courses for spring at Cape Fear. Given 1.2 UNCW gpa and having exhausted available repeats, student does not expect he will return to UNCW. Will use semester at CFCC to reflect and explore options. Offered to meet with him to discuss this at any point if he wishes to do so. Advised to drop spring 2017 schedule at UNCW.”

“Spoke to Student re: academic probation - at 1.755. Still wants to do CLR although discussed need for competitive GPA Said that things "went downhill around midterms". Plans to repeat BIO 240 and drop BIO 241 and PSY 246 for 13 hours. Asked him to call me in Jan to schedule appt and call with questions once he received probation letter”