Guidelines for: **WRITING ADVISING REPORTS**

Reports enable advisors to recall discussion, actions and decisions from previous student sessions, and protect both students and advisors by providing documentation on important decisions, actions and referrals.

~Pat Folsom, Tools & Resources for Advisors (2008)

### INCLUDE...

- **Persistence & Graduation**
  - Information relevant for advisors & staff
  - Information related to advice & resources discussed
  - Options presented to the student
  - Recommended action items & consequences
  - Approvals/denied policy exceptions
  - Referrals to campus resources. Ex. career services, Learning Resource Center, professor, etc.

  Ask Yourself:
  Is this related to the student’s ability to persist or graduate? What would be helpful for another advisor to know?

### LEAVE IT OUT...

- Subjective / judgmental statements
- Negative comments/language: bad, lost, cannot, clueless, etc.
- Sensitive medical or mental health info
- Personal information
- Comments about other staff/faculty

Ask Yourself:
Would I be okay with the student and their parents reading this information?

### Federal Education Rights & Privacy Act (FERPA)
- Advising reports are subject to FERPA, which means students have the right to request and view any documentation related to their educational record
- Adding Advising Reports and information related to interactions with students is NOT a violation of FERPA. Individuals who can view these documented interactions have a shared educational interest.

### Health Insurance Portability & Accountability Act (HIPPA)
- Information related to medical information, diagnosis, mental health, etc. should not be documented in advising reports.

### EXAMPLES

- Determined whether or not degree requirements are or will be complete. Explained spring 20XX is possible if earns “C” or higher in the following courses: MGT 4195, ACCT 4070, ACCT 4150, ACCT 4648, and MGT 4040.
- Discussed role of internship/co-op in educational experience and employability. Referred to career services.

**Try...**

- Student has not enrolled in math. Discussed importance of taking math early to ensure timely graduation.
- Discussed time mgt and organization strategies. Referred to Learning Resource Center.

**Instead of...**

- Student is scared of math and avoiding it.
- Student is pregnant, works two jobs and can’t get organized.

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UMass Amherst Student Success, March 2018

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**The Bottom Line**

**-- WHEN IN DOUBT, ASK-- KEEP IT SHORT & TO THE POINT -- BE NEUTRAL --**
<table>
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<tr>
<th>Topic</th>
<th>Example Report Statements</th>
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| Academic Research Opportunity             | • Interested in participating in research. Suggested meeting out OURS in the LRC. Showed how to schedule an appointment online.  
• Student mentioned wanted to gain more experience in field. Recommended looking into research opportunities and shared information about the OURS program. |
| Early Alert / Academic Difficulty         | • Discussed course progress in XXXX. Identified the following action steps: Talk to professor, scheduled appt with LRC, and take notes during class.  
• Student mentioned difficulty in Math XXX. Suggested office hours and getting to know faculty member. Reviewed office hours in syllabus and identified time to attend.  
• Discussed study strategies for MATH XXX. Identified one strategy the student will try. Suggested scheduling an appointment with LRC. Student stated would schedule appt on their own. |
| Faculty Connection                        | Shared value of faculty/student relationship and suggested student attend office hours.                                                                                                                                         |
| Goal Setting                              | • Set a goal for upcoming exam in Math XXX. Goal is to....  
• Discussed goal setting beyond courses, such as getting involved on campus. Student set a goal to research campus involvement opportunities this week and pick 1 organization to try out. |
| Major/Career Exploration                  | Student mentioned interest in another major. Discussed strategies for learning about majors and scheduled an appointment with an advisor in XXX major or XXX career event. |
| Parental or Family Pressures              | • Discussed external factors impacting academic progress. Referred to campus resources for further conversation on navigating personal circumstances.  
• Student expressed concern about external pressure guiding his major selection process and inhibiting his exploration of alternative options. |
| Mental Health or Extenuating Circumstances| • Discussed navigation of personal circumstances and/or transition (specifically personal wellness, social situation, navigation on campus housing, etc.) to the university. Reviewed campus resources and (insert academic skill) strategies that may support this situation. Connected with XXX policy on XXXX.  
• Student disclosed suffering a loss in her personal life. I referred her to some appropriate campus resources. |
| Time Management                           | • Reviewed planner and assisted with writing down upcoming dates.  
• Discussed weekly schedule and routine. Identified best times to study. |
| General Academic Transition               | • Discussed strategies to get involved on campus.  
• Reviewed options for creating a balance course load next semester. |
| Non-Academic Conversations                | • Student works a part-time job. Referred to financial aid to explore scholarship or aid opportunities to alleviate need to work.  
• Student shared concerns about experience thus far. Referred to campus resources. |
| Academic Standing/Probation               | Reviewed academic standing policy and discussed consequences. Completed projected GPA calculations for current course. Communicated that must earn a XXX GPA to remain at UMass. |