



# UR STUDENT SYSTEM

## Guidance for Creating Advisor Notes in UR Student

# Guidance for Advising Notes

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- It is best practice to enter a note after every interaction with a student - once a note is entered into UR Student, that note becomes a part of the Student Educational Record
- Help advisors guide discussions with students, prompt the author of the note or other interested parties about important information for follow up, and can be especially useful in cases where a student is experiencing academic and/or personal challenges
- Use wording and tone that is factual and non-judgmental
- Private notes in UR Student are subject to FERPA and confidentiality provisions, which includes the student's right to request review of their academic record
- Take care to assure that the note reflects an *accurate, informative, respectful, and professional* description of the (1) reason for the student meeting; (2) the response/advice given by the individual who is meeting with the student; and (3) the next steps including referrals, action items, deadlines and follow up meetings.
- Be sure that comments do not implicitly assume that the student's version of events is completely factual unless you have independent confirmation
  - Instead, it is more appropriate to phrase your comments as a "report" from the student, e.g. "The student reported that they were not permitted to turn in a late assignment."

# Guidance for Advising Notes (cont'd)

- When documenting sensitive and confidential topics of conversation about a student such as mental and physical health, disability, academic honesty charges, religious affiliation, disciplinary charges, sexual orientation, and other potentially private topics, you should use general phrases such as:
  - “Student discussed a personal matter which is interfering in their ability to attend classes.”
  - “Student reported that they are not sleeping very well. I referred the student to several campus resources.”
- Always keep in mind that the student may have been comfortable sharing sensitive information with you, but they may not want the information shared with others.
- As a reminder, if a student discloses that they are a survivor of sexual harassment or misconduct, staff and faculty in their roles as academic advisors are required to notify a campus Title IX coordinator. For more information, see <https://www.rochester.edu/sexualmisconduct/>
  - Please Note: Information about a student’s disclosure or the referral to the Title IX coordinator should NEVER be placed in an advising note.