

Documentation Guidelines: Meaningful Student Interactions in Holistic Advising

Purpose

To provide a standardized approach for documenting student interactions that support academic success, personal development, and institutional accountability. It is intended for use by advisors and campus partners engaged in holistic student support.

I. What Constitutes a Meaningful Interaction?

A **meaningful interaction** is any engagement that contributes to a student's academic, personal, or professional development. These interactions should be documented when they:

- Relate to student success or development.
- Involve actions taken (e.g., referrals, schedule changes).
- Fall under specific services (e.g., financial aid, academic performance).
- Affect student outcomes or reveal patterns (academic, personal, behavioral).
- Include substantial conversation or emotional expression.
- Involve communication from or about parents, faculty, or campus partners.

Examples:

- Student expresses anxiety about a disciplinary meeting.
 - Advisor sends a resource link or modifies a schedule.
 - Parent calls/emails about academic concerns.
 - Student vents about challenges or discusses goals.
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II. Documentation Guidelines

A. General Principles

- **Timely:** Enter notes promptly after the interaction.
- **Objective:** Avoid personal opinions; describe behaviors factually.
- **Clear:** Write so any advisor or campus partner can understand.
- **Relevant:** Focus on degree progress and student success.
- **Compliant:** Follow FERPA and Title IX guidelines.

B. What to Include

- **Interaction Details:** Who, what, when, where, why, how.
- **Student Mood:** If outside the norm, note reactions.

- **Action Items:** Tasks for student or advisor, referrals made.
- **Follow-Up:** Reference previous tasks or outcomes.
- **Communication Channels:** Summarize texts, emails, phone calls.
- **Missed Appointments:** Document no-shows, even repeated ones.
- **Campus Collaboration:** Include relevant info for faculty or partners.
- **Personal Notes:** If appropriate, include memorable details that could foster rapport in future meetings (e.g., student mentioned preparing for a sibling's wedding).

C. Formatting Tips

- Avoid shorthand or ambiguous lingo.
- Use templates to ensure consistency and efficiency.
- Be concise but thorough.
- Clearly document options and student decisions.
- Note when advice is given and whether it was accepted or rejected.
- Use efficient, relevant language—avoid over-explaining.

III. Special Considerations

- **Sensitive Issues:** Be discreet; report through appropriate channels.
- **Legal Readiness:** Consider whether documentation may be reviewed in legal or administrative settings.
- **Cross-Campus Use:** Ensure notes are helpful to other departments and understandable without context.

IV. Best Practices

- Go into appointments prepared.
- Be proactive in identifying student needs.
- Emphasize referrals and partnerships.
- Document all interactions, even informal or non-CFA ones.
- When in doubt—**document**.

Conclusion

Effective documentation is essential for supporting student success, fostering collaboration, and maintaining institutional integrity. Advisors are encouraged to err on the side of over-documenting and to use this guide as a reference for consistent, professional, and meaningful record-keeping.