



Why Document Advising Notes?

Documenting advising notes helps:

- Support student success over time
- Ensure continuity if another advisor works with the student
- Track referrals, decisions, and follow-up items
- Protect both the student and the institution

When Should I Write a Note?

Write a note after every advising appointment, including:

- Scheduled advising appointments
- Drop-ins or quick check-ins
- Phone calls, emails, or text conversations
- Meetings involving parents, faculty, or campus partners
- Missed or no-show appointments

Best practice: Write the note as soon as possible while details are fresh.

Step-by-Step: How to Write an Advising Note

You can think of each note as telling a short, professional story of the appointment. Just make sure to be specific in your note taking.

- Student said they submitted AP scores (in what?)
- Student mentioned they lived on campus (where?)

Step 1: Start with the Basics (The Context)

Include the essentials so anyone reading the note understands the situation:

- Who: Student name (auto-filled in most systems)
- What: Advising appointment / check-in / phone call / email
- When: Date of interaction
- Why: Reason for the meeting

Example:

Student met with advisor to discuss fall course registration and concerns about maintaining full-time status.

Step 2: Summarize What the Student Shared

Briefly capture the main topics or concerns discussed. Focus on facts and student-reported information.

Be objective and avoid assumptions or judgments

Good examples:

- Student expressed concern about failing Calculus.
- Student shared feeling overwhelmed by balancing coursework and part-time work.
- Student discussed uncertainty about major choice.

Avoid:

- “Student is lazy/unmotivated.”
- “Student clearly doesn’t care.”

Step 3: Note Student Mood or Behavior (Only If Relevant)

Only include this if the student’s emotions or behavior were:

- Outside what you would consider typical
- Important to understanding the situation

Examples:

- Student appeared tearful when discussing academic probation.
- Student was visibly anxious when reviewing GPA status.

Step 4: Document Actions Taken During the Appointment

Include:

- Schedule changes
- Resources shared
- Referrals made (tutoring, counseling, financial aid, etc.)
- Advice given

Example:



Advisor reviewed degree audit and adjusted spring schedule. Advisor referred student to the Center for Academic Excellence and shared tutoring link.

Step 5: Clearly List Action Items

Spell out who is responsible for what.

Examples:

- Student will contact Financial Aid to discuss SAP appeal.
- Student will attend tutoring weekly.
- Advisor will follow up after midterm grades post.

Clear action items help ensure accountability and continuity.

Step 6: Include Follow-Up Plans (If Applicable)

If the appointment connects to past or future interactions, note that.

Examples:

- Advisor will check in via email in two weeks.
- Follow-up appointment scheduled for advising hold removal.

Special Situations to Always Document

Make sure you document when:

- A student misses or no-shows an appointment
- Parents or family members contact you
- Faculty or campus partners are involved
- Sensitive topics arise (without unnecessary detail)

Example (No-Show):

Student did not attend scheduled advising appointment. No prior notice received.

What to Avoid in Advising Notes

- Personal opinions or emotional language
- Diagnosing mental health conditions
- Overly detailed or unnecessary personal information
- Shorthand, slang, or acronyms others may not understand

When in doubt, ask yourself: “Would I be comfortable if another advisor, administrator, or reviewer read this note?”

Sample Complete Advising Note

Student met with advisor to discuss difficulty in Chemistry and concerns about GPA. Student reported feeling overwhelmed balancing coursework and employment. Advisor reviewed degree audit and discussed withdrawal timeline. Advisor referred student to tutoring services and discussed reducing work hours. Student will contact employer and attend tutoring weekly. Advisor will follow up after midterm grades.

Quick Checklist Before You Save

- ☒ Is the note clear and objective?
- ☒ Does it explain why the meeting happened?
- ☒ Are actions and referrals documented?
- ☒ Are next steps clear?

If yes, you're done.

Key Takeaway

You do not need to write long notes. You need to write useful notes.

When in doubt—document the interaction.