

## *Documentation Guidance*

Documenting our advising session is a critical part of the overall experience. In our documentation, we should strive to accurately reflect the facts of the session while capturing the information in the briefest and clearest means possible. The following tips are meant to assist you in reaching an acceptable level of accuracy, brevity, and clarity.

- Start with the advised degree/major/concentration/pre-professional program with minor.
- If the student has decided to change any part of their academic program, note the original degree/major/concentration/pre-professional program with minor then note the new degree/major/concentration/pre-professional program with minor. (COM from \_\_\_\_\_ to \_\_\_\_\_)
- Note the number of hours you advised the student to take.
- Include a note about any earned hours as seen on the transcript or degree audit.
- Next, note any pending credit. This can include Advanced Placement exams (AP), International Baccalaureate exams (IB), SAT II, dual credit (DC), transfer work (TR), or summer courses (SS) before matriculation. If there are no credits pending, note that as well.
- During your advising session, many other issues may be discussed. As a minimum, mention the following in your notes, if applicable to the situation.
  - ❖ Student requested courses for exploration
  - ❖ Justification of courses which may be at a higher or lower level than may be expected based on standardized test scores or placement exams
  - ❖ Closed courses
  - ❖ Student expressed desire to forfeit credit
  - ❖ Others present in the session (during fall/spring note FERPA form usage)
  - ❖ Parent/student insisted upon less or more hours than appropriate
  - ❖ Any instance that is against your advising—these we note with AAA. (see abbreviations on next page)

**Do not include any references to OALA, counseling center, or sensitive personal information regarding the student!**

- To aid in brevity, it may be helpful to abbreviate some common terms. Below is a list of common abbreviations.

AAA	Against Advisor's Advice	HS	High School
CBC	Credit-Bearing Course	IAW	In Accordance With
CBE	Credit By Exam	MLPE	Modern Language Placement Exam
CE	Career Exploration	NSE	New Student Experience
CHA	Chapel	PREREQ	Prerequisite
COM	Change Of Major	REF	Referral
CR	Credit	REQ	Requirement
D/A	Drop/Add	SS	Summer School
DC	Dual Credit	TR	Transfer
ELEC	Elective	SSC	Student Success Collaborative
EPE	English Placement Exam	UAS	Unified Advising System
FA	Formal Advisement	UND	Undecided
FR	Freshman	W/P	With Parent
HRS	Hours		

Here is an example of what we don't want.

10 June 2018

Advisor – C. Dickens

Mr. Lorry entered the room with excitement and trepidation. As for the session, here is what I can say. It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of Light, it was the season of Darkness, it was the spring of hope, it was the winter of despair, we had everything before us, we had nothing before us, we were all going direct to Heaven, we were all going direct the other way – in short, the period was so far like the present period, that some of its noisiest authorities insisted on its being received, for good or for evil, in the superlative degree of comparison only.

While he means well, Mr. Dickens' notes don't really explain what happened in the session. What topics were discussed, if any? Instead, here are some good examples we might follow.

BA/ENG advised to take 15 hours

6 hrs DC in PSC and ECO on BU transcript

Pending AP in CHE and FRE

Pending DC in ENG

Plans to take Calculus in SS

Requested GTX 2302—discussed this would be an elective, but taking this AAA

COM from BA/PSC/PLAW/PL to BBA/PBUS

Advised to take 16 hrs

Pending IB in ENG, ECO, and PSC

No pending AP or DC

Selected MTH 1309 due to SAT of 640

Wants to take ITA to major in INB later

BS/PBIO/PM advised and registered for 14 hours

No pending AP or DC

WP

Family did not want two sciences and MTH—discussed PM progression

Wants to continue GER, but needs MLPE—placed into GER 1401 until results are received

Wanted MTH 1321, but has not started ALEKS

Student wanted 12 hours to help starting GPA; discussed major progression and PM and decided on 14 hours