

Guide to Electronic Notetaking

HuskySuccess facilitates a campus-wide coordinated student support network by allowing advisors and other campus support personnel to coordinate student support through Notes that document interactions and other relevant information. The benefits of a single, accessible repository for Notes include improved communication, coordination, and progress reports to assist students with persistence and timely completion.

Advisors and support personnel will typically utilize two types of notes in HuskySuccess.

1. **General Shared Notes** can be created when you have given specific advice to a student. You can share this note to your own email, with the student and it will be recorded in the students file on HuskySuccess for BU Employees who have a role supporting the students progress at BU.
2. **Speed Notes** can be created directly from appointment and provide advisors and support personnel with a short cut for common items discussed during appointments.

Why should you create a Note when meeting with a student?

- Reminder of the advice given during meetings with students (in person, by email or phone).
- Help advisors and other student support staff provide consistent, informed service.
- Create an “institutional memory” of contacts and recommended actions.
- Record valuable data on student use of support services and associated outcomes.

The content of Notes aims to communicate:

- For what was the student seeking help?
- What steps were taken to address the student’s concerns?
- What advice and recommendations were made?
- What are agreed upon follow-up actions? Were specific referrals made?
- Overall, summarize what you discussed as it relates to the student’s success.

Why should someone create a Note?

- Record important information that learned outside of an advising appointment (e.g. changes in registration, financial aid, information learned in a progress report or a reenrollment campaign, etc.)
- Record the outcomes of your efforts to resolve issues for the student.

What’s the difference between a Speed Notes and a Note?

- Speed Notes document important information about specific appointments, such as dates, times, reasons and locations. A Speed Note should always be tied to a specific appointment between an advisor/support personnel and a student.
- Notes can describe information about the student that are gained outside of an appointment.

What kind of information should and should not go into a Note?

When including a note, alert or progress report in HuskySuccess, keep in mind that all personnel with roles and relationships with the student are able to view the notes. Students may request access to these notes, and that they can be subpoenaed by third parties under FERPA guidelines. Sensitive information should only be included when academically relevant and handled with discretion. It is best to note sensitive information under general headings of **family, financial, academic, personal, or health.**

Electronic Advising Notes

DO	DON'T
Briefly summarize what was discussed as it relates to student success for future reference by the student, other support staff, and future advisors:	Summarize everything that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals, and follow-up plans.
<ul style="list-style-type: none"> Recommendations: "Recommended student take MATH 101 to create a more solid mathematic foundation." Advice: "Cautioned against taking 18 credits this semester given work schedule." Referrals: "Referred to Center for Professional Development and Career Services." Action Plans: "Student plans to follow up with tutoring and schedule an appointment with me after mid-terms." 	<ul style="list-style-type: none"> Include unnecessary details: "She said she has been having a good week and is especially excited about moving into a different apartment." Include personal/sensitive information: "Student disclosed that she has been visiting the Counseling Center." Include subjective opinions: "The student seemed unmotivated and disrespectful."
Summarize specific course recommendations	Report problems with specific instructors
<ul style="list-style-type: none"> Encouraged student to take HISTORY 270 as a MyCore. "Recommended student take BIOLOGY 100 fall semester 2019." 	<ul style="list-style-type: none"> "Student doesn't like his COMM 103 instructor." "Student said EGGS 108 professor has unfair grading policies."
Spell things out for a general audience	Use acronyms other campus support staff may not understand
Write fact-based academic-related notes	Include speculation, subjective opinions, or judgments
<ul style="list-style-type: none"> "Student is concerned about grades in two courses." "Student is considering whether his current major is a good fit. Helped him consider other options. And suggested he might want to visit the Academic Advising Center for more assistance" "Student needs to successfully complete PSYCH 110 before taking any upper level PSYCH courses." 	<ul style="list-style-type: none"> I don't think she is very motivated this semester." "His personality isn't a good fit for STEM fields. I think he'd feel more at home doing something artistic or creative." "She has probably been avoiding BIOLOGY 136 because she struggled with BIOLOGY 135."
Use general or coded language concerning sensitive material	Include sensitive information, personal concerns, private matters
<ul style="list-style-type: none"> "Student reported extenuating circumstances related to his academic progress this semester." "She discussed a difficult situation and requested help from a campus support service." "Student disclosed a personal situation that's having an impact on how things are going this semester." 	<ul style="list-style-type: none"> "Student's parents are going through a divorce." "She reported she was assaulted by her boyfriend earlier this year." "Student was recently diagnosed with an autoimmune disorder."
Record referrals made and resources shared	Report details surrounding sensitive referrals
<ul style="list-style-type: none"> "Referred to Financial Aid Office." "Referred to Office of Student Success." "Discussed resources of the Student Health Center." 	<ul style="list-style-type: none"> "He said he can't concentrate because of relationship problems with his girlfriend. I referred him to the Counseling Center." "He said he's been having a lot of headaches lately. I'm concerned something more serious may be going on. I suggested he go to Student Health Service to get it checked out."
Include reminders and descriptions about student record	Include negative judgements student behaviors
<ul style="list-style-type: none"> Will be applying for scholarship in Fall. Started writing for the student newspaper this semester. Is interested in study abroad in junior year. Is working to start an on campus poetry organization. 	<ul style="list-style-type: none"> "She seems like she just blows off advising appointments. I can't get her to be serious and plan ahead." "He seems pretty uninformed about the real world after college and hasn't followed through with plans to get information from his Sociology professor. I think he needs to be more realistic."