

The Passport Advisor Notes

The Passport advisor notes promote effective communication between various departments. This centralized system reduces redundancy and saves time by eliminating the need to re-investigate or re-evaluate a student’s case. Advisor notes protect you as a professional and the student in case information provided or received was wrong or misunderstood. The notes serve as documented records and are included in the students’ electronic file.

Guidelines:

- Record only the “academic” facts. Indicate only what the student has taken, is missing, recommendations, and/or next steps related to academic progress toward students’ degree(s). **DO NOT** include anything that contains information that is personal, confidential, financial, American Disabilities Act (ADA), and/or other sensitive material.
- Do not add opinions, subjective information, and assumptions.
- Indicate in the note the type of advising: in-person meeting, phone conversation, email exchange, etc. This provides the context of your interaction with the student.
- Summarize important email information. Do not copy lengthy emails into notes. Only put your entry of what you wrote/told the student.
- Make detailed notes, so that another advisor/evaluator/faculty member can determine how to proceed.
- If you are unsure how to document and/or unsure if you should include specific information, consult w/ your supervisor or department chair. You can always add another note, but you *cannot remove* a note that was already submitted. So, “When in doubt, leave it out.”
- Be informed of the Family Educational Rights and Privacy Act (FERPA) guidelines and updates.

The categories below contain examples of academic related notes versus notes that contain too much personal/sensitive information.

 Correct	 Incorrect
In-person meeting: student dropped Course XXXX and plans to take it over the summer. Referred student to course equivalency form.	Student dropped Course XXXX because they don’t want to wake up early. Student will take the course over the summer.
Phone conversation: student called to confirm that they signed up for the appropriate D4 course. Explained how to navigate to academic requirements report to see option that fulfill D4 area. Reminded student to file for graduation by the appropriate deadline and referred them to check w/ major and minor departments.	Student heard rumors around campus that the course that they are signed up for does not fulfill their D4 area. Reviewed course with student and reminded them to see only a professional to confirm course requirements. Discussed graduation steps.
In-person meeting: discussed current academic standing with student and set follow-up appointment to discuss progress.	Informed student on academic probation that they need to manage their time better if they are going to remain enrolled.
Email exchange: student wanted to know more about GWE. Discussed test dates and prerequisites. Referred to SEAS webpage for test taking tips.	GWE
In-person meeting: discussed Early Alert and progress with the student. Referred student to multiple resources.	Student came in to discuss early alert and multiple classes they are failing. Student indicated they have XXXX disability and they were connected to DSO.
Email exchange: confirmed student has the following courses left to complete their major: XXXX, XXXX, XXXX.	Courses left to complete major: XXXX, XXXX, XXXX. Student disclosed that they are taking longer than expected to complete their degree due to personal issues they had to deal with in the past (domestic violence).
In-person meeting: discussed four year plan with student during their advising appointment and confirmed targeted graduation date.	Student was late to advising appointment and did not come prepared as instructed. Discussed four year plan.