

## **Note-Taking Best Practices When Using “CRM ADVISE” System**

**Note Title:** Start with department acronym and list subject of visit. i.e., “AAIC – Academic Warning,” “ARC/CON - Spring Advisement,” “BIO – Switching major,” “STS – Internship.”

### **Essential Information to Include:**

- 1) Why is student here to meet with you? In most cases this would be advisement for classes.
- 2) Recommendation of the advisor – what courses to take, referral to another department (i.e., tutoring, financial aid, DSC), career advice, etc.
- 3) Individual circumstances of the student – this may not be necessary in straight-forward cases where the courses and course-load are as expected. However, this is where one should provide justification for choices that are not straight-forward. This might include: student works full-time and needs lighter load (or cannot work mornings/evening), student is considering switching to another major, student athlete, etc. This provides subsequent advisors with a reasoning behind choices that might otherwise be open to question.

### **Information that requires some caution when mentioning:**

- 1) Temper language and assessments.
  - Rather than labeling a parent as ‘intrusive,’ consider expressions like ‘highly involved.’ - Be sure to note when a student insists on a certain course of action that you perhaps disagree with (i.e., student insists on a two-day schedule despite that she will have no breaks; student wants to take a course that is not a major requirement even if this may delay progress in the major).

- 2) **Mention of your, and student, interactions with the listed departments** requires discretion.
- Even if students disclose that they receive certain benefits or work together with one of these departments, generally be cautious before putting this in your notes.
  - Instead, recommend that the student always disclose anew on their own whenever meeting with FSC staff. For example, “I appreciate you sharing this information with me, but you should know that we often do not document this in our notes unless you consent. Please consider disclosing this information when you meet with someone else at Farmingdale, provided you feel comfortable doing so.”
- a) **Disability Services Center** – avoid mentioning that a student is receiving DSC services or working with Malka and the other DSC staff, unless student gives consent.
- Instead, simply justify a particular choice of schedule, by writing something like: “student suggests/insists on taking only two writing-intensive courses,” or “student wants to avoid two classes in a row.”
  - If student has a disability waiver for foreign language, rather than state that they have the waiver, write in the notes to look into Banner SOATEST, which would have that info, as well as non-disability related reasons why student need not take language.
    - If student is seeking a foreign language waiver, but it does not appear in SOATEST, encourage them to visit the DSC.
- b) **Mental Health Services** – avoid mentioning that a student receives counseling from Mental Health Services.
- If a student exhibits behavior that leads you to refer that student to seek services (even if you actually accompany the student or put them on the phone to set up an appointment), simply note that you referred the student to Mental Health Services.
- c) **Financial Aid** – when students are contemplating taking courses outside their major requirements or below the required amount of credits, or are dropping/withdrawing, always suggest they seek additional advisement concerning financial aid.
- Simply write something in your notes like: “Recommended that student seek advisement from Financial Aid before taking any further steps.”
  - If they disclose to you that they are receiving financial aid, and it impacts the advice you give (i.e., to change/add/drop a class), you can mention it, but let the student know that this will be in the records, to notify future advisors.
  - Do not mention the actual program (i.e., ‘Excelsior’) through which they receive aid unless they consent. Make student aware that it is to their advantage for their advisors to always be in a position to recognize possible Financial Aid ramifications.
- 3) **Private Notes** – think of these more like ‘personal’ notes. They might involve things you want to remember about a student to maintain a bond (i.e., hobbies, place of employ, etc.).
- Though it is very unlikely, high level CRM administrators could look in here.
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