



# ADVISING & COUNSELING NOTES

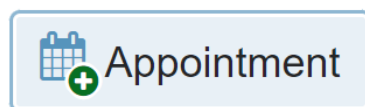
## BEST PRACTICES FOR DOCUMENTING ONE-ON-ONE STUDENT INTERACTIONS

### Introduction

The Viking Success *shared notes system* provides a centralized location for documenting interactions between students and members of their success network. Notes entered into the system are **visible to all institutional stakeholders**, increasing the continuity of shared information and providing a comprehensive view of a student's case history.

### Documenting a One-on-One Interaction With a Student

Whether the student is a walk-in or has a scheduled meeting, it is best practice to document these interactions by adding an **appointment** in Viking Success. For campus wide consistency, please include the following information:



#### Scheduling Tab

#### Outcomes Tab

**Student:** Can be searched by *last name first name*, *ID number*, or *campus email alias*.

**Where:** Locations can be set under the *Appointment Preferences* options in your user profile settings.

**Reason:** Preset options allow for more efficient data filtering.

**Sharing:** Private makes the appointment visible to only the support provider and the student. **Even when marked as private, the information is still disclosable under FERPA.**

**Detailed Description:** Record the reason for the meeting and what may have precipitated it.

**Time/Attendance:** The actual time meeting took place or whether student missed a scheduled appointment.

**Email:** This will send the note to the student's *Messages* page on their Viking Success profile. **If you do not send a copy of the note, it will still be visible by the student.**

**Comments:** Include a *brief summary of all topics covered*. Include any *policies/procedures discussed*, *resources shared* (include URLs if applicable), and *any referrals made*, while avoiding the disclosure of sensitive information. It is also best practice to copy any written communications or emails (with sensitive information redacted).

## Considerations To Take

It is important to fully understand both the **legal and ethical responsibilities** attached to note-taking in a shared system, especially as it relates to potentially sensitive information. Assume that students, parents, lawyers, or the public will read anything and everything you have entered.

Notes **SHOULD** be academic in nature and based on facts, objective, general, and non-descript.

Notes **SHOULD NOT** be judgmental, value-laden, guesses, predictions, or assumptions. They should not make mention to medical and mental health concerns, legal problems, social issues, family concerns, or conflicts with faculty or staff.

Before entering a note, think to yourself: *Is this information based on fact; Is this information that the student would want to be disclosed; Is this information that my colleagues need to know; Is this information within my field of expertise?* If the answer is *no* to any of these questions, do not include it in the note. **When in doubt, leave it out!**

## DSO and Mental Health Referrals

Referrals to the Department of Mental Health & Counseling Services and the Disability Services Office (DSO) are confidential information protected by the Health Insurance Portability and Accountability Act (HIPPA) and Americans with Disabilities Act (ADA), respectively. These referrals should **NEVER** be included in Viking Success' shared notes system.

## Examples of Note Dos and Don'ts

<b>Situation</b>	<b>Dos</b>	<b>Dont's</b>
A student is worried about their performance in two classes.	"Student is concerned about grades in two courses."	"Student is worried about two classes; doesn't seem motivated this semester."
An engineering student is considering changing their majors.	"Student is considering whether their current major is a good fit. Helped them consider other options."	"Student's personality isn't a good fit. I think they'd be better suited for something in the arts."
A student in an opportunity program is unable to afford credits and/or materials.	"Referred student to Financial Aid."	"First-generation student receiving little help from the family that is struggling financially."
A student has experienced an incident of domestic violence and is struggling.	"Student disclosed a personal situation and requested help from campus support services."	"Student reported an assault by their partner. I have referred them to Mental Health and Personal Counseling services."

## Privacy of Student Records

Information entered into Viking Success (as well as Degree Works) becomes an official part of a student's academic record and is subject to the Family Educational Rights and Privacy Act (FERPA). Even when marked as private, notes can still be accessed by anyone acting with legitimate educational interest or legal authority. Please keep this in mind when entering notes.

## Questions?

If you have any questions or need assistance with using the Viking Success platform, please visit [www.sunywcc.edu/academics/viking-success](http://www.sunywcc.edu/academics/viking-success) or email [vikingsuccessteam@sunywcc.edu](mailto:vikingsuccessteam@sunywcc.edu).