



DOCUMENTATION GUIDELINES OVERVIEW

WHY WRITE SUMMARY REPORTS?

BoilerConnect is Purdue University's primary platform for timely, purposeful documentation of academic advising and student support interactions. Purdue requires staff to record summary reports consistently and accurately to ensure seamless records of students' needs and plans. This also enables a holistic approach for documenting academic success and creating a critical, individualized connection between students and Purdue policies, opportunities, and resources.

SUMMARY REPORTS ALSO PROVIDE:

- A network of continuous support for students as they interact with various support staff, departments, campus services, and other campus representatives
- A vehicle for individualized support of connections with a student
- Context of a student's experience to minimize repetition and redundancy among campus partners
- Opportunities to document development and learning, as well as progress toward degree completion

DOCUMENTATION BEST PRACTICES

- **Fact-based, descriptive summary reports** help convey the unique dynamics of a student contact. **Narrative notes** are encouraged for readability and nuanced circumstances. **Bulleted summaries** are also effective because they can be skimmed in preparation for an appointment.
- Summary reports are most useful when entered during, immediately after, or within 24 hours of an appointment or interaction and are immediately viewable within the system by students and other staff. Timely recording helps document important details accurately and maximizes the ability of campus partners to act with purpose, clarity, and timeliness in meeting the needs of a student.

INCLUDE INFORMATION THAT:

- Is factual and objective
- Helps the student
- Helps colleagues understand the student or the advice you provided
- Includes a list of courses you advised the student to take along with alternatives
- Facilitates the relationship with the student
- Explains possible consequences if advice is not adhered to
- Includes referrals of a non-sensitive nature
- Includes referrals of a sensitive nature, with limited details
- Helps you in future interactions with the student

DO'S AND DON'TS OF EFFECTIVE DOCUMENTATION: A QUICK GUIDE

DO:

- ✓ Document student interactions with the understanding that content may be viewed by the student and by others who have an educational need to know, under Purdue's FERPA policy.
- ✓ Assess how a summary report will contribute to the holistic record of a student's academic, personal, and career pathway and what will maintain an appropriate level of disclosure.
- ✓ Enter summary reports during, immediately after, or within 24 hours of an appointment or interaction. Timely recording helps document important details accurately and maximizes the ability of campus partners to act with purpose, clarity, and timeliness in meeting the needs of a student.
- ✓ Start each summary report with a short phrase to indicate the type of appointment so other staff can find relevant information quickly when reviewing student profiles.
- ✓ Use fact-based, descriptive, narrative, and bulleted summary reports as appropriate to help convey the unique dynamics of a student contact.
- ✓ Refrain from including opinions, speculations, and personal emotions.
- ✓ Provide enough information that will enable a campus colleague to contextualize the student's circumstance and the related advice offered.
- ✓ Describe behaviors rather than diagnose or evaluate, e.g., "Student displayed slurred speech, loss of coordination and an inability to follow our conversation," to describe someone you may think is intoxicated.
- ✓ Document contacts from other student support staff or parties if they have a bearing on career or degree progress. Phone conversations, notes, or e-mails to and from third parties may be included.
- ✓ Exercise care with the language employed when recording information, conversations, or referrals of a highly personal or sensitive nature. Report information in the context of a student's academic experience with relevant facts only.
- ✓ Request students' express permission to include certain sensitive information in BoilerConnect documentation, such as preferred gender pronouns or symptoms indicative of a disability.
- ✓ Consult with your supervisor if concerns arise regarding including specific information in the student record.
- ✓ Check your summary reports for accuracy before saving them.

DON'T:

- ✗ Do not promise confidentiality to the student.
- ✗ Do not withhold key relevant details. Notes such as "Registration Appointment" do not provide sufficient information to be helpful to campus partners.
- ✗ Do not use jargon and uncommon abbreviations or acronyms.
- ✗ Do not make overt promises if you cannot guarantee the result. If you speculate about an outcome/impact of an action or decision, be clear with the student (and in your note) to acknowledge the hypothetical nature of your conversation.
- ✗ Do not speculate regarding a student's motivations, concerns, or abilities, or label a student's personality based on behavior (e.g., "She was a bully and rude in the meeting").
- ✗ Do not diagnose, assess, or offer judgment on the student or circumstance. Likewise, readers should never assume or interpret a diagnosis based on another support staff member's BoilerConnect documentation.
- ✗ Out of respect for students' privacy, avoid reviewing students' personal information unless you have an educational need to know or are assisting a student directly.