

# SSC-Campus Documentation Guidelines

## Navigating to the Help Center

- Click on the ? icon, top right
- Click Help Center



## Useful Videos under “Getting Started”

- Platform Overview Demonstration
- Searching for Students
- 30 Second Gut Check
- Student Profile: Understanding Success Progress
- Navigating the Student Profile
- Communicating with Students
- Creating Notes and Advising Summary Reports

## Guidance on documenting student interactions in SSC-Campus

SSC-Campus offers two main avenues for tracking interactions, advising summary reports and notes, which have different uses. At MTSU, advisors should primarily record student interactions using the Advising Summary Report function. The table below explores the differences between these options.

Feature	Advising Reports	Notes
Records reasons for the note/appointment	Yes	Yes
Records meeting type ( <i>walk-in, phone, email, etc.</i> )	Yes	No
Records date and duration of the appointment	Yes	No
Records advisor notes regarding the interaction	Yes	Yes
Allows advisor to attach a file	Yes	Yes
Easily viewable by the student*	No	Not by default*

*\*All notes and reports entered in SSC-Campus are considered part of student’s education record and are subject to a FERPA request from the student. No note or advising report is 100% private. For guidelines regarding appropriate note taking, see below.*

## Examples

Advising summary reports should be as succinct and informative as possible and should adhere to the guidelines below. For example: “Advised 6 credits for summer; 15 in fall. Options: COMM 3000, COMM 3005; FALL 2016 (12-16 credits from below) COMM 4000, COMM 4540, COMM 3310, COMM 4300. Also discussed PR electives as available or COMM electives. Referred to Career Services.”

Notes are like personal sticky notes – an optional place for advisors to record information that may be important to their relationship with the student, but are not relevant to the advising or university community, or to the degree plan. They can easily be made viewable to just the advisor entering the note. For example, “Interview with FBI next week,” or “Trip to South America to see family this summer.” As a general rule, however, if you wouldn’t want the student to read it, it’s probably not a good idea to record it in the platform.

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## Advising Refresher: Best Practices for Advising Documentation

### ***Why document interactions with Summary Reports?***

- Advisors need to document advising contacts adequately to aid subsequent advising interactions.
- Notes and advising reports help provide a consistent advising experience for the student.
- Other advisors will be able to see how the student was previously advised and provide a more continuous advising experience (vs. making the student repeat information for each advisor).
- Effective documentation can easily clear up misunderstandings between students and university personnel.
- Documentation also provides protection in case of legal action.

### ***Draft Guidelines for SSC Campus Reporting & Documentation***

- Document all formal face-to-face interactions (in-office, CUSTOMS, advising days, etc.) in the platform with Advising Summary Reports.
- Document online, phone, and/or e-mail interactions/exchanges if:
  - the interaction/exchange is unique and significant to a single student or a small group of students (e.g., group advising), or;
  - the interaction/exchange is important with regard to information-sharing among faculty, advisors, and/or other campus colleagues.
- Do not document bulk or mass e-mails in the platform. While not all e-mail communication originates within SSC Campus, all messages sent through the platform will be available as part of Conversation history.
- Do not document sensitive health, legal, or other confidential information in the platform.

### ***Tips for Effective Documentation***

- File your reports documenting student interactions as soon as possible.
- Be factual, concise, and objective.
- When framing your notes/reports, consider including information that:
  - Helps the student
  - Helps future advisors or colleagues understand the student or the advice you provided
  - Includes a list of courses you advised the student to take along with alternatives
  - Facilitates a quality 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

# SSC-Campus Documentation Guidelines

## *Do's and Don'ts*

### **DO:**

- ✓ Keep documentation as brief & succinct as possible.
- ✓ Be specific when describing what was discussed & agreed upon between you & the student.
- ✓ Include general information about the student.
- ✓ Record all courses you recommend the student take (& why if appropriate).
- ✓ Document all referrals that were made.

### **DON'T:**

- ✗ Write in code.
- ✗ Write subjective comments about the student.
- ✗ Include student comments about faculty or staff, especially negative ones.
- ✗ Include personal information about the student that is sensitive.
- ✗ Include your personal thoughts/opinions about the student.