

# Best Practices for S3 Memos & Stellic Notes

Carnegie Mellon recognizes the value of a common approach to creating and maintaining a record of advising notes. **S3 Memos** allows for a campus-wide advising notes system that facilitates the sharing of advice between advisors and student support staff. **Stellic Notes**, available in the Stellic Degree Audit Application, allows for the sharing of advice and comments between academic advisors and students. These applications, when used in conjunction with the following best practices, aim to impact student success and create a more personalized student experience.

## Why Use S3 Memos & Stellic Notes?

- Help advisors and other student support staff communicate and provide consistent service.
- Create an “institutional memory” of contacts and recommended actions.
- Personalize the advising experience by refreshing the advisor’s recollection of previous conversations.

## Shared Advising Notes Content Aims to Communicate:

- What was the student seeking help with?
- What advice and recommendations were made?
- What are agreed upon follow-up actions? Were specific referrals made?
- What was discussed as it relates to the student’s success at Carnegie Mellon and beyond?

The **Family Educational Rights and Privacy Act (FERPA)** entitles students to access any notes considered part of their academic record. Notes in S3 and Stellic are considered part of a student’s academic record and are accessible by students, open records requests and court subpoenas. This applies to all notes and memos whether they are designated as shared with students or not.

## With this in mind:

- Assume students, parents or the general public will read anything and everything you have written.
- When writing notes in S3 or Stellic, ask yourself the following questions:
  1. Is this something the student would want other people to know?
  2. Is this something another advisor would need to know? Why?
  3. Is this something that is within my scope of practice to say?
  4. Are the details in my notes based on fact?
- When possible, avoid including personal and/or sensitive content.

### TIPS:

Describe,  
don’t evaluate.

When in doubt,  
leave it out.

## Is It Sensitive or Confidential Information?

When a student discloses sensitive or confidential personal information that the advisor needs to remember, but which may be too sensitive to include in S3 or Stellic, the advisor should take handwritten notes on paper. Handwritten notes should be kept in a secure location, and destroyed as soon as they are no longer needed by the advisor or upon the student’s graduation. Note that all handwritten notes could be obtained and potentially made public in a lawsuit.

## S3 Memos & Stellar Notes: Do's & Don'ts

DO	DON'T
<b>Briefly summarize what was discussed as it relates to student success for future reference by yourself and others.</b>	<b>Notes are intended to be a brief record of advising contacts.</b>
<ul style="list-style-type: none"> <li>Recommendations: "Recommend student take course XXXXX-XX because of their interest in Engineering."</li> <li>Advice: "Cautioned against taking overload this semester."</li> <li>Referrals: "Referred to Career Services."</li> <li>Action Plans: "Student will follow up with Academic Development and schedule an appointment with me after mid-terms."</li> </ul>	<ul style="list-style-type: none"> <li>Include sensitive information (<i>examples below</i>).</li> <li>Include subjective opinions, especially negative commentary (<i>examples below</i>).</li> </ul>
<b>Summarize specific course recommendations.</b>	<b>Report problems with specific instructors (report such concerns through other appropriate avenues).</b>
<ul style="list-style-type: none"> <li>"Encouraged student to take course XXXXX-XX as a gen ed."</li> <li>"Recommended student take course XXXXX-XX in fall 2019."</li> </ul>	<ul style="list-style-type: none"> <li>"Student doesn't like Professor ABC because of the teaching style."</li> <li>"Student said instructor has unfair grading policies and is biased."</li> </ul>
<b>Write fact-based advising notes.</b>	<b>Include speculation, subjective opinions or judgments.</b>
<ul style="list-style-type: none"> <li>"Student is concerned about grades in two courses. We discussed some strategies to help with motivation."</li> <li>"Student needs to complete course XXXXX-XX before applying for an internal transfer. We discussed obstacles and goals."</li> <li>"Student missed the last three advising appointments we had scheduled. We discussed the importance of keeping our appointments."</li> </ul>	<ul style="list-style-type: none"> <li>"It seems like student just blows off advising appointments. I can't get student to be serious and plan ahead."</li> <li>"Student has probably been avoiding course XXXXX-XX because they struggled with course XXXXX-XX."</li> </ul>
<b>Use general language concerning sensitive matters.</b>	<b>Include details that may be too sensitive/personal.</b>
<ul style="list-style-type: none"> <li>"Student reported family/financial circumstances related to academic progress this semester."</li> <li>"Student discussed a difficult situation involving a partner and requested help from a campus support service."</li> <li>"Student reported being recently diagnosed with a serious health issue."</li> </ul>	<ul style="list-style-type: none"> <li>"Student reported being physically assaulted by a partner." (In this situation, consult directly with the Office of Title IX Initiatives.)</li> <li>"Student was recently diagnosed with a thyroid disorder."</li> </ul>
<b>Make university referrals.</b>	<b>Report sensitive/personal details related to referrals.</b>
<ul style="list-style-type: none"> <li>"Referred student to CAPs for assistance with a personal relationship matter."</li> <li>"Referred student to The HUB for financial assistance."</li> <li>"Referred student to Career &amp; Professional Development Center regarding their interest in a summer internship."</li> </ul>	<ul style="list-style-type: none"> <li>"Student can't concentrate because of relationship problems with a partner. I referred student to CAPs."</li> <li>"Student reported having little financial support from their family due to a recent job loss and bad investment decisions."</li> </ul>
<b>Include notes that will facilitate future work with the student.</b>	
<ul style="list-style-type: none"> <li>"We agreed to meet once a month during the spring semester."</li> <li>"Commended student for excellent grades last semester."</li> </ul>	

Portions of these best practices are summarized or adapted from: *Adopting a Campus-Wide Student Notes System*, [www.eab.com](http://www.eab.com); *Advising Notes: Best Practices*, North Dakota State University; and *Guidance on the Content of Undergraduate Advising Notes*, University of Notre Dame.