Credit SSSP Services Notes

The Importance of Taking Notes

- **Continuity of Support** – Notes ensure that future interactions build on previous discussions, providing a seamless experience for students.
- **Accuracy & Accountability** – Documenting key points helps maintain accurate records of advice given, reducing miscommunication and liability risks.
- **Collaboration & Transparency—If a student meets with different counselors, Other counselors or staff members can refer to notes to provide consistent guidance.**
- **Tracking Student Progress** – Notes help identify trends, challenges, and follow-ups, allowing for better long-term student support.
- **Compliance & Institutional Standards** – Proper documentation aligns with best practices and institutional policies for record-keeping and student support.

Best Practices for Note-Taking (Comment Section)

- **Notes can be subpoenaed** – Keep documentation professional, factual, and concise.
- **Document external transcripts & test scores** – Indicate if the student has CLEP, AP, IB scores, or transcripts from other institutions.
- **Record referrals to campus services** – Note any referrals to SAS, Financial Aid, Learning Centers, Mental Health Services, or other resources.
- **Capture key academic details** – Summarize the student's general academic plan, major(s), and intended transfer institutions.
- **Outline processes reviewed** – Document any processes discussed, such as CPOS (Course Program of Study), SAP (Satisfactory Academic Progress), Academic Renewal, graduation petitions, Reinstatements, Committee on Exception, Prerequisite Clearances, or Prior Credit Evaluation Requests.
- **Summarize email exchanges** – Feel free to copy, paste, and edit key points from emails sent to the student or on their behalf to other departments.
- **Clarify recommendations** – If you advise for or against specific actions (e.g., unit loads, repeating courses, adding/dropping classes), note your reasoning.
- **Explain CPOS-related course recommendations** – If adding courses due to a CPOS notice, provide context so that other counselors can understand the decision when reviewing the degree audit or Ed Plan.
- **Provide justification** for adding the course outside of the student's stated goal (e.g., "Added BTEC 107 for major exploration or professional development").
- **Anticipate potential disputes** – Document any information that might be questioned later, such as statements like, "They told me I could graduate."