

# Tips for Documenting Performance

Documentation is important because it provides chronological evidence:

- of a student's improvement or lack of improvement over time.
- that a student deserves an available opportunity.
- that a student was made aware of any issues or concerns.
- that supports decisions to escalate the situation if needed.

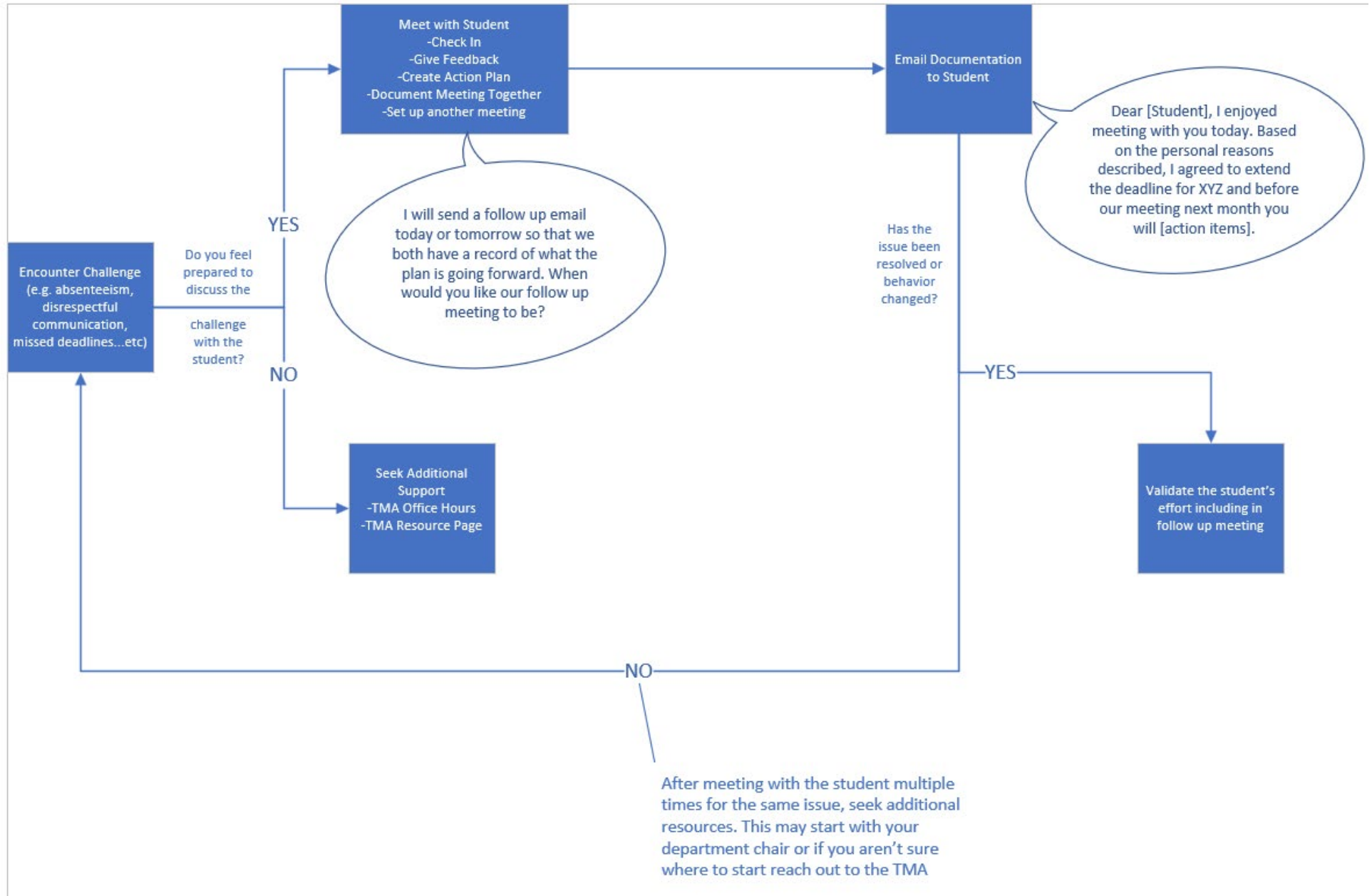
In your documentation of a conversation with a student, which could be in the form of a follow-up email, include:

- the date of the conversation.
- who took part in the conversation.
- what the subject(s) of the conversation was.
- information related to the student's progress toward their degree and/or professional goals.
- recommendations, advice, and referrals you provided the student.
- student opinions or decisions related to your recommendations.
- requests made by the student.
- plans for follow up with the student.

Tips for documenting encounters with learners include:

- Be as accurate as possible.
- Complete your documentation as soon after the conversation as possible.
- Stick to facts: write down just what was said by you and the student.
- Do not try to interpret the student's behavior and unstated reactions.
- If you hypothesize about the outcome of a decision or action, be clear that it is speculative.
- Do not include documentation of a student's personal problems.
- Do not include details of a disclosed disability/accommodation or physical/mental health conditions.
- Do not diagnose, assess, or judge the student's circumstances or issues they face.
- Do not include information about other students.

# Flowchart of Student Communication and Documentation



## The NOTES Acronym

The acronym NOTES is useful in helping guide what you discuss with the student and include in your documentation afterward.

### Needs analysis

- What does the student need or want to accomplish? What are their goals for this interaction?

### Options/opportunities

- What options or opportunities might the student consider?

### Timeline for action

- How long does the student have or when should they act on your advice?

### Educate the student about referrals or resources

- Who on campus might assist the student? What resources are available to the student?

### Schedule a follow-up

- When will you and the student meet to revisit this interaction/conversation?

## References

Guidelines for Documenting Student Interactions in Navigate. Virginia Tech. Accessed February 24, 2025.

<https://advising.vt.edu/navigate/navigate-access/guidelines-advising-reports.html>

Tips for Documenting Performance. Clemson Human Resources. Accessed February 24, 2025.

<https://media.clemson.edu/humanres/Performance/Tips-for-Documenting-and-Monitoring-Performance.pdf>