

Trinity College

Best Practices for Stellic Notes



Trinity recognizes the value of creating and maintaining a common record of advising notes. Stellic Notes allow for a college-wide advising notes system to facilitate the sharing of advice and comments between advisers, staff, and students. Stellic Notes, when used following higher education best practices, aims to improve student success and create a more personalized student experience.

Why Use Stellic Notes?

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

Advising Notes Content Aims to Communicate:

- What did the student seek help for?
- What advice and recommendations were given?
- What were the agreed upon follow-up actions? Were specific referrals made?
- What was discussed about the student’s success at Trinity and beyond?

The **Family Educational Rights and Privacy Act (FERPA)** entitles students to access any notes considered part of their academic record. Notes in 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.

Keep in mind:

- Assume students, parents or the general public will read anything and everything you have written.
- When writing notes in Stellic, ask yourself the following questions:
 1. Is this something the student would want other people to know?
 2. Is this something another adviser 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

How to treat Sensitive or Confidential Information?

When a student discloses sensitive or confidential personal information that the adviser needs to remember, but which may be too sensitive to include in Stellic, the adviser 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 adviser or upon the student’s graduation. Note that all handwritten notes could be obtained and potentially made public in a lawsuit.

STELLIC NOTES: Do's & Don'ts

DO	DON'T
Briefly summarize what was discussed as it relates to student success for future reference by yourself and others.	Notes are intended to be a brief record of advising contacts.
- Recommendations: "Recommend student take SUBJ ### because of their interest in Engineering." - Advice: "Cautioned student against taking more than 4.5 course credits this semester." - Referrals: "Referred to Career & Life Design." - Action Plans: "Student will follow up with Academic Success and schedule an appointment with me after midterm."	- Don't include sensitive information (examples below). - Don't include subjective opinions, especially negative commentary (examples below)
Summarize specific course recommendations	Don't report problems with specific instructors (report such concerns through other appropriate avenues)
"Encouraged student to take SUBJ ### to meet distribution requirement." "Recommended student take SUBJ ### in fall 2025."	"Student doesn't like Professor ABC because of the teaching style." "Student said instructor has unfair grading policies and is biased."
Write fact-based advising notes	Don't include speculation, subjective opinions or judgments.
"Student is concerned about grades in two courses. We discussed some strategies to help with motivation." "Student needs to complete SUBJ ### before applying for an internal transfer. We discussed obstacles and goals." "Student missed the last three advising appointments we had scheduled. We discussed the importance of keeping our appointments."	"It seems like student just blows off advising appointments. I can't get student to be serious and plan ahead." "Student has probably been avoiding SUBJ ### because they struggled with SUBJ ###."
Use general language concerning sensitive matter	Don't include details that may be too sensitive/personal.
"Student reported family/financial circumstances related to academic progress this semester." "Student discussed a difficult situation involving a partner and requested help from a College office." "Student reported being recently diagnosed with a serious health issue."	"Student reported being physically assaulted by a partner." (In this situation, consult directly with the Title IX Coordinator.) "Student was recently diagnosed with a thyroid disorder."
Make College referrals	Don't report sensitive/personal details related to referrals.
"Referred student to Counseling and Wellness Center for assistance with a personal relationship matter." "Referred student to Financial Aid Office for financial assistance." "Referred student to Career & Life Design Center regarding their interest in a summer internship."	"Student can't concentrate because of relationship problems with a partner. I referred student to Counseling Center." "Student reported having little financial support from their family due to a recent job loss and bad investment decisions."
Include notes that will facilitate future work with the student.	
"We agreed to meet once a month during the spring semester." "Commended student for excellent grades last semester."	