**Program Notes**

**Overview**

Program notes are a space for advisors to enter any details they want to remember that aren't being tracked elsewhere. Maybe your student has a huge presentation in a couple of weeks and you want to remember to ask about it next time you chat with them, or they mention that they've been up late studying and not sleeping very much, which you'd like to bring up in your next conversation. These notes should not be used for reporting or be shared with anyone externally, unless a very specific MOU is in place with the other organization and all students have consented to their information being shared in this way.

**Though notes are an advisor tool, it is important that they still be professional, objective, and free of judgment or insensitive language**. We often have students come to work at Bottom Line as interns or full-time staff.

Program Notes Best Practices

Visit the Program Notes tab to read through past notes. You can scroll to read them reverse chronologically, or type in the filter box to only see notes with certain words/phrases in them (highlighted in yellow).

You can also use the toggle checkbox (highlighted in red) to show only notes that **do not** include a specific word/phrase.

**Adding a Note**

Click the "Create Note" button at the top right hand side of your screen to add a new note.

**Private Notes**

* **WHY**: Our students may experience disruptive events of a sensitive nature (referred to at Bottom Line as "life events.") While we want the student's advisor, future advisor(s), and program leadership to have access to these notes, we restrict access to protect our students' privacy.
* **What to enter**:
  + Click "Create Note"
  + Check the box where it says "Private?"
  + Category
    - Choose "Life" from the dropdown
  + Life Event Category
    - Family Issues
    - Mental and Physical Health
    - Other (please specify in the note)
    - Legal Issues
    - Basic Needs (Food/Housing/Transportation)
    - Financial Challenges
    - Safety
    - Executive Functioning
    - Facing Discrimination or Racism
  + Write all of the relevant details in the note
* When viewing notes in the Program Notes tab, a checked box on the left (pictured below) indicates that this note was categorized as private

**Assessment Notes**

* **WHY**: Assessments are the one time we expect a slightly longer, narrative note on each student. Since students sometimes change advisors at the end of the semester (especially at the end of an academic year), it's helpful to have these write-ups available to the new advisor as a starting point (or for you to remember everything after a long break!)
* **What to enter:**
  + Please follow the instructions detailed on the [Assessments](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#assessment-notes) page