Documenting Disability Professional and Student Interactions:
Reasons and Recommendations for Notes

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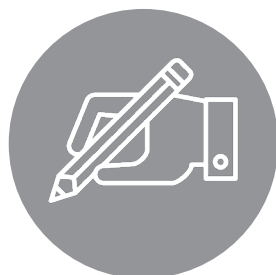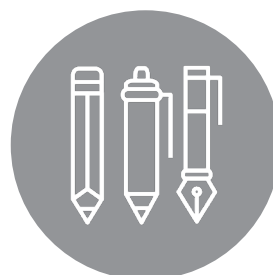Adam Crawford
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Acknowledgement

Foreword

In July 2017, the authors of this paper gathered to discuss the ongoing challenges and wide variation in the documentation practices for disability resource professionals (DRPs) documenting student interactions (i.e. notes). To gain a better understanding of the current practices, the authors conducted a survey (Appendix A). The results of that survey highlighted the need for guidance on best practice for internal notes, herein referred to as "notes." This white paper aims to meet this need.

Developing a model of best practice is difficult given the variance in philosophy and mission of disability resource (DR) offices and the multiple demands and needs of DRP's. As a profession, we routinely struggle to address the required services, caseloads are large, and DR offices are understaffed. Admittedly, most DRP's are unable to draft a comprehensive set of notes for every student meeting or event given time constraints. Thus, the "best" notes will look different and will serve different purposes from campus to campus.

In section I of this paper we define notes for the reader and discuss current practices in the field. Section II describes the multiple uses of quality notes and their critical role in disability resources. Section III describes role of notes and offers guidance on crafting notes. Section IV includes examples relative to need and interaction, while Section V offers a review of available databases for storing notes.

In this whitepaper we offer a best practices framework to aid DRP's in note development that is informed by a progressive and integrative culture of inclusion for students with disabilities. We hope that DR professionals and administrators find this guidance helpful in planning for the time and effort necessary for effective notes, within an achievable practice for their offices.

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The purpose of this white paper is to offer disability resource professionals (DRPs) a framework for the need, development, use, formatting, and storing of notes. This framework should be used in concert with guidance from institutional legal counsel and in keeping with campus culture and mission.

Defining "Notes:" Mechanisms for Internal Documentation

In order to begin this process, the authors defined and operationalized the terms. "Notes" and "internal documentation" are used similarly in this paper. These terms refer to professional notes created by DRPs and maintained in a database management or filing system that document student-DR interactions and decision-making regarding the approval, provision, and implementation of accommodations. The term "internal documentation" in this paper does not denote third party medical, health, or counselor/psychologist reports that DRPs receive to document disability.

The Need for Guidance

Effective practices for creating notes are routinely taught in professional training for counselors, social workers, and other service-oriented professionals. The field of disability resources, however, does not require formal training or certification and does not offer instruction or best practice on notes.

DRPs report a need for guidance regarding practices for internal documentation or "notes." In particular, DRPs seek guidance on how to best document DRP-student interactions, issues regarding access, and accommodation decisions. Lack of guidance leads to inconsistencies in practice. Understandably, DRPs have questions regarding notes including the amount of information to be included, the tone, and the detail needed for quality notes. DRPs must be able to provide an objective and accurate accounting of student-DRP interaction in the event of a formal complaint or litigation. Despite the emerging social justice focus of disability resources, the work is rooted in a legal obligation to provide equal access to students with disabilities under the Americans with Disabilities Act as Amended[1] and Section 504 of the Rehabilitation Act of 1973[2]. When complaints regarding discrimination and lack of access arise, quality and detailed notes can safeguard the DR professional, the DR office, and the institution.

External "Tertiary" Documentation

Since 2012, AHEAD has recognized the changing landscape of reasonable access and decision-making. AHEAD recommends that DRPs look beyond traditional third-party documentation when determining disability and making determinations about the provision of accommodations. In cases where external documentation (e.g., psychoeducational evaluations, professional notes, IEP's, etc.) are scarce or unavailable, internal documentation (the notes between the student and DRP) become critical. Notes are necessary to record student-reported information including barriers to or within courses, programs, activities, or attitudes. These notes inform accommodation decisions. DRPs should review AHEAD's April 2012 publication, *Supporting Accommodation Requests: Guidance on Documentation Practices*, which identifies three weighted levels of documentation—primary, secondary, and tertiary—for use in aiding DRP determination of reasonable accommodations.

The AHEAD publication identifies the three levels of documentation as:

- Primary Documentation: Student's Self-Report
- Secondary Documentation: Analysis of DRP Observation and Interaction with Student
- Tertiary Documentation: Information from External or Third-Parties

The inestimable value of the student narrative including the disability experience, barriers encountered, and accommodation history is recognized as primary documentation in the AHEAD guidance. The narrative can substantiate (potentially on its own) a need of reasonable accommodation for equitable access. The impressions and conclusions formed through DRP-student interaction or through the evaluation of previously effective accommodations serves as a secondary level of documentation. The AHEAD guidance recognizes that experienced DRPs can utilize observations of students' language, performance, and strategies as appropriate metrics for validating the student self-report. Translating the aforementioned observations into notes is a critical part of creating documentation for decision-making.

1 Civic Impulse. (2018). S. 3406 — 110th Congress: ADA Amendments Act of 2008. Retrieved from https://www.govtrack.us/congress/bills/110/s3406
2 Civic Impulse. (2018). H.R. 8070 — 93rd Congress: Rehabilitation Act. Retrieved from https://www.govtrack.us/congress/bills/93/hr8070

Part II: Survey and Results

Disability Resource Professionals Current Practices
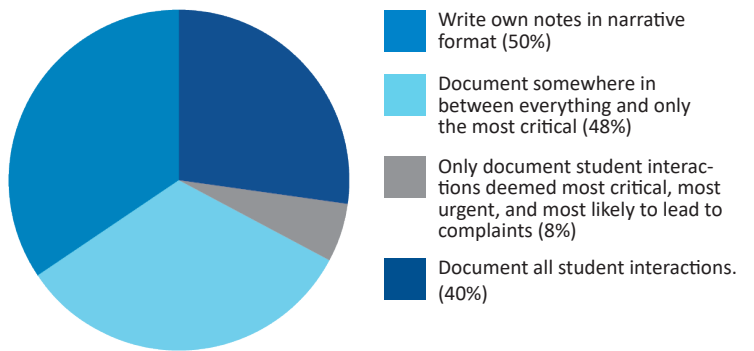
Background and Methods

In the summer of 2017, a survey[1] developed by Enjie Hall, Lisa M. Meeks, and Adam Meyer was distributed via three listservs: the AHEAD members' listserv, the Disabled Support Services in Higher Education (DSS-HE) listserv, and the Coalition for Disability Access in Health Science and Medical Education (The Coalition) listserv to gain a better understanding of the current practices and concerns regarding notes. 157 responses were received.
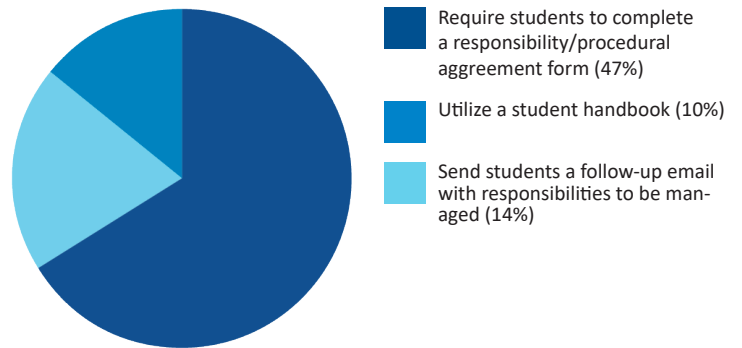
DRPs Current Practices

Data from the 2017 survey yielded a variety of practices for noting interactions. Most DRPs reported utilizing email as a primary means of documenting DRP-student interaction. DRPs also reported that a lack of time and high caseloads kept them from maintaining robust notes. With an average active student caseload of 164 [2]students, some reaching upwards of 600, DRPs report being limited how, and to what extent, they document their interactions. As a result, very few interactions are reported in detail and DRPs often focus their documentation efforts on the most critical and potentially litigious situations.
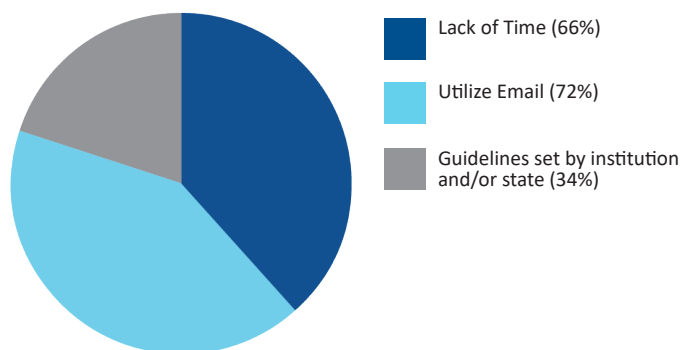
Results

Respondents were encouraged to provide more than one response when appropriate; therefore, many of the percentages reported exceed 100%.
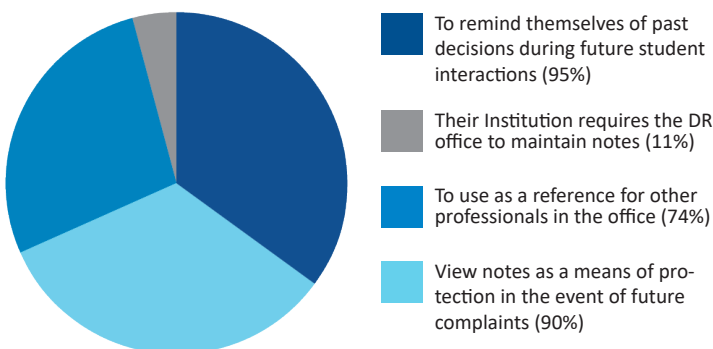

- Write own notes in narrative format (50%)
- Document somewhere in between everything and only the most critical (48%)
- Only document student interactions deemed most critical, most urgent, and most likely to lead to complaints (8%)
- Document all student interactions. (40%)

Current Practices for Documenting Student Interactions

- Require students to complete a responsibility/procedural aggreement form (47%)
- Utilize a student handbook (10%)
- Send students a follow-up email with responsibilities to be managed (14%)

Methods of Documenting Student Responsibilities for Managing Accommodations

- Lack of Time (66%)
- Utilize Email (72%)
- Guidelines set by institution and/or state (34%)

Factors in Creating Comprehensive Notes

- To remind themselves of past decisions during future student interactions (95%)
- Their Institution requires the DR office to maintain notes (11%)
- To use as a reference for other professionals in the office (74%)
- View notes as a means of protection in the event of future complaints (90%)

Motivation or Basis for Recording Notes

- Summary of the conversation with the student (95%)
- Reference the history of accommodations used in other educational settings (64%)
- Include other professional observations and assessments beyond decision rationale (66%)
- State the rationale for access decisions made (72%)
- Provide disability, diagnostic information, and functional limitations (74%)
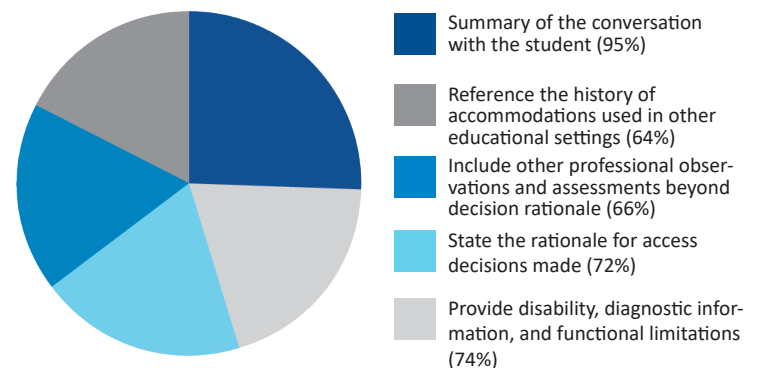
Key Components of Notes

1   Survey can be found in Appendix C.
2   Scott, S. (2017). Disability Resource Professionals and Their Individual Work with Students. Huntersville, NC: Association on Higher Education and Disability

Part III: The Purpose of Notes

Benefits of Good "Notes"

Process Standardization

Institutional Memory and Continuity in Service

Working with Other Offices and Stakeholders

Judicial Boards and Title IX

Privacy Regarding Notes and FERPA

Notes and emails serve as a record of communication between the student and DRP; they also serve as a record of the interactive process. Comprehensive notes summarize third party documentation with emphasis on portions that support the student's request for accommodations. In this way, notes serve as a record of the DRP's analysis of third-party (tertiary) sources such as—documents from health care providers that verify the student's diagnosis and, in some cases, offer thoughts or suggestions for accommodations that will mitigate the effects of disability.

Notes should serve as a record for critical points of contact including: initial appointments, ongoing appointments, communications to students regarding decisions about accommodation requests, the process for implementing approved accommodations, evaluations that lead to denials of an accommodation request, as well as consultations with faculty, staff, professionals, or individuals in which the student has signed a release of information giving DRPs permission to communicate.

Although documenting the initial meeting is critical for determining eligibility for services and appropriate and reasonable accommodations, barriers to full access may unfold beyond the initial meeting with a DRP. As the student engages new curriculum and physical spaces, they may encounter new barriers. Ongoing documentation, including accurate and complete notes for each new barrier helps chart the student's experience and provides a timeline of services and decision-making.

Working with Other Offices and Stakeholders

DRPs may be called upon to provide information counsel and support to a variety of campus constituents—academic support, dean of students, residential life, diversity and inclusion officers, judicial affairs, title IX coordinators, and general counsel. As the number of students with disabilities rises, and the complexity of their cases increases, it is not unusual for a student's case to include crossover with one of the aforementioned offices. Accurate notes allow the DRP to provide accurate and appropriate information.

Judicial Boards and Title IX

Students with disabilities may require accommodations during a Judicial, Conduct, or Title IX complaint, investigation, or hearing and may require the assistance of the DR office in these procedures. Notes and external documentation may help DRPs determine if accommodations are needed to ensure full access to the proceedings. In addition, notes regarding a student's preferred communication style, processing, and other pertinent facts may help the DR professional advocate for appropriate and effective sanctions.

Privacy Regarding Notes and Family Education Rights and Privacy Act (FERPA)

DRPs should understand the distinctions within the Family Education Rights and Privacy Act (FERPA) as they relate to notes (Letter to: University of North Alabama, No. N/A [Family Policy Compliance Office 11/02/2004]). Under FERPA, notes developed as a written record for DR offices are part of the student's educational record and can be viewed by institutional officials who have a legitimate educational interest. Students are also permitted access to their own educational records under FERPA including notes and other records housed in their DR file including emails, observational notes, notes related to student-DR or student-faculty interactions. On the other hand, DRPs personal notes intended as personal reminders are not maintained in the file and are not considered educational records. These records are not viewable by students under FERPA. DRPs should be aware that their formal notes can be used in discovery[1] should complaint or litigation occur. Thus, personal reflections and judgments should always be avoided.

> Best Practice Tip:
> **Document all rejections and support decision in writing**

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1 A pre-trial procedure in a lawsuit in which each party can obtain evidence from the other party or parties by means of discovery devices such as a request for answers to interrogatories, requests for production of documents, and depositions.

The Benefits of Good Notes

The top five reported benefits of notes based on survey results.

Process Standardization

In addition to documenting background, the interactive process, and decision-making— notes may be used to standardize practice across DRPs and provide better service to students. Having a consistent template for notes ensures a consistent approach for documenting accommodation requests across DRPs. For example, a template for an initial meeting might include fields for student narrative, DRP observations, accommodation history, and accommodation recommendations from medical/educational professionals, procedure overview, referrals, and reference to the accommodation grievance policy.

Institutional Memory and Continuity in Service

Notes are also helpful in the event of employee turnover. Institutional memory is the curated knowledge within an organization. When institutional memory fails, students can experience frustration by having to repeat critical or sensitive information to new DRPs, who may not fully understand the history of or the key decisions about a scenario. Keeping a strong institutional memory in the form of comprehensive notes improves service to the student and diminishes dependency on the individual DRP and saves time by offering a historical account of actions to date. A well-managed notes system can provide updates and reminders as well.

When exchanges between student and DRP are well documented, new professionals are better equipped to resume the work of their predecessor, helping to ensure continuity of service for students. In larger offices, notes also provide continuity between professionals when a student calls the office or attends walk-in hours and their assigned DRP is not available.

Supervision

A positive practice that builds a cohesive team includes the exchange of notes between supervisors and DRPs to establish expectations for documentation practices and decision-making. New DRPs' notes can provide insight into their understanding of the process for determining disability status and reasonable accommodations, helping supervisors catch errors early, before patterns or complaints arise. Since quality notes can contribute to the overall performance of the DR office and DRPs, supervisors may consider using notes as a factor in performance review.

Documentation for Complaints or Litigation

In the event of a complaint or litigation, notes provide a recorded timeline around student actions and requests, provide verification that the interactive process occurred, identify individuals involved or consulted, and serve as a record of an accommodation determination and communication between the office and the student. Notes may also contain email communication demonstrating a student's understanding of the decision-making process and their responsibilities for implementing accommodations.

Preparation of notes for purposes of documenting compliance is an essential element of the DRPs duties. Third party reviewers (e.g., University General Counsel, Office for Civil Rights, etc.) may require access to the student's file with little notice. Thus, notes should be stored and organized in a manner that allows quick access to detailed information—including denial of student requests, informal/internal complaints and appeals, and dates documenting the timeline for accommodations—from application to implementation.

Most important, a DRP's notes should accurately and objectively represent the student's interactions without bias.
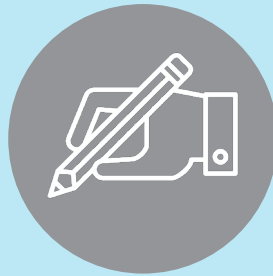
Part IV: Elements of Notes

Types of Notes

Critical Components of the Note

The Note "Buffet"

Notes detail multiple facets of DR-Student relationship from initial inquiry contact to the final encounter. Critical elements of notes include date, duration, and purpose of the meeting, and any necessary follow-up. The nature of the specific interaction will dictate the breadth and depth of a given note. Below are common types of notes and critical components of notes.

Types of Notes

Inquiry Notes

Inquiry notes are records of a student's first contact with office, usually by phone or email. These contacts are usually simple with the goal of asking about documentation requirements or scheduling an appointment. Sometimes, however, students ask extensive questions prior to an extensive initial or have extenuating circumstances that require a response via email before they can determine whether or not to attend your institution (e.g., Do you have accessible housing for graduate students? Are course substitutions possible for a math or foreign language requirement if you have a learning disability? How do I arrange accommodations for placement exams? In these cases, it is important to begin a file for the student and keep notes on any interactions. It is also a good idea to note the date of the students first contact and any need for follow up.

Initial Meeting Notes: Documenting the Access Barriers and Accommodations

Initial meetings, sometimes called the intake by DRPs, can be extensive as they include educational history and history of accommodations, anticipated barriers, requested accommodations in postsecondary education, history of any gaps in educational history (planned or unplanned), prior use of assistive technology, level of comfort and knowledge regarding educational program (especially important for graduate and professional students), future board or other planned high stakes exam accommodations, a review and analysis of submitted documentation, rationale for reasonable accommodations determined in meeting, and planned follow-up correspondence to faculty or staff. These notes serve as the background from which all other notes refer. For this reason, it is very important to keep detailed notes for the initial meeting.

Ongoing notes

After the initial meeting, notes on subsequent meetings are often less extensive and focus more on the specific needs, for example, a flare in symptoms prompting a change in accommodation, planned leave of absence, difficulty in a course versus historical data. These notes should account for any current or planned changes in accommodation including implementation.

Notification of Policies and Procedures

An email after the initial meeting often serves as the reference for new students to understand the general expectations for themselves, the DR Office, and in some cases, the faculty. Other offices utilize a standardized process or procedure manual that students sign upon receiving services. Whether using emails to document "next steps" or using a signature page from a standardized document, DRPs should maintain a record of the communication about DR policy and process in the student's file as a note. Such notes serve as a record of student notification about accommodations agreed upon and the process to follow, for example, how to schedule an accommodated test or how to notify faculty of a disability-related absence. Given the critical nature of this communication, and the potential for an accommodation to go unrealized if processes are not followed, notes should reflect the date and method of the communication to a student, along with any student concerns or opposition to the process. Notes are considered part of a student's academic record under FERPA and a student may make a request to view their academic record, which would include these notes, at any time.

> ### Best Practice Tip:
> **Document that student understands policies and processes.**

Critical Components of Notes

Historical Elements

The historical perspective can serve as a justification for providing services and as a guide for determining appropriate accommodations to aid in decision-making about eligibility for reasonable accommodations. This information can be gathered through: student narrative, DRP nondiagnostic observation, and third-party documentation.

History of **disability** might include:

- Services for a disability through agencies such as vocational rehabilitation, centers for the blind or deaf, independent living centers, the Veteran's Administration, mental health facilities, board of developmental disabilities, etc.
- Medical information such as when the student was diagnosed, functional limitations to daily life activities, impact of medications and side effects, symptoms that have impacted the educational experience, and frequency and duration of flair-ups or periods of exacerbation
- The student's account of disability, historical experiences with barriers and helpful strategies to compensate/ self-accommodate
- Barriers the student has experienced in the educational and personal environment, in using technology, or participation in programs/activities
- Use of assistive technology or auxiliary aids and services including alternative formats and media, use of mobility or medical devices, or aid of an assistance animal

History of **accommodations** might include:

- Accommodations in the K-12 educational setting through an IEP or 504 Plan
- Informal accommodations by teachers or instructors
- Accommodations at other institutions of higher learning
- Accommodations on standardized tests
- Accommodations in the vocational setting
- Vocational Rehabilitation recommendations

Additional Information

The initial meeting is the best time to establish rapport with the student and record notes that include a holistic summary of the student as a unique individual. Additional non-disability specific information can also help the DRP to make referrals to resources on campus or in the community.

Additional information can include:

- Major, minor, and career goals
- Support network including family and friends
- Involvement in clubs and organizations
- Financial landscape including financial aid and scholarships
- Learning styles and tools for organization
- Academic strengths and weaknesses
- Living situation, living on campus or commuting to campus

- Current employment
- Interest in tutoring services

Documenting for Experiential Learning

In addition to accommodations for in-person lectures, labs, recitation, and online courses, students may be required to participate in experiential learning courses such as student teaching, co-ops, practicums, field work, clinicals, internships, etc. Notes should include information on anticipated barriers in the experiential learning setting, high-stakes exams, and concerns about technical standards.

Elements for documentation in experiential learning may include:

- Selective placement, restrictions to specific setting, or other barriers in the environment
- Schedule restrictions, for example: No overnight call
- Required or expected competencies or clinical skills that require accommodation
- Concerns about safe patient or client care and how these were addressed
- Need for assistive technology (and possible barriers to its implementation)
- Need for ergonomics
- Patient Health Information (PHI) concerns that result from the use of assistive technology
- A record of accommodation implementation and the stakeholders consulted to determine clinical or site accommodations

Rationale for Decision-Making

Rationale for decision-making should be presented to the student and captured in notes.

Elements for documenting rationale may include:

- The connection between the disability, the barrier, and the approved accommodation
- Barriers that cannot be removed through accommodation
- Student refusal for eligible accommodation

Accommodation Denials

Accommodation denials should be communicated in person and in writing with a clear reasoning behind the denial including:

- Student refusal for eligible accommodation
- Reason for denial (e.g., undue burden, fundamental alteration, direct threat, unnecessary, unsupported by the collective documentation and student self-report, etc.)
- Alternative options for access
- Information on how to appeal the decision

Please see Appendix B for a chart detailing critical information to include in notes.

Barriers to Access

It is important to document the barriers present within the environment and the impact of the barriers on student access. Notes should acknowledge the reported barrier and note action taken to improve access. When a student reports a barrier to the DRP, the barrier is often rooted in one of the following areas:

- A physical accessibility issue (e.g., a lack of accessible furniture in the classroom);
- A digital accessibility concern (e.g., a lack of captioning on videos);
- A restrictive policy challenge (e.g., a course attendance policy that poses a challenge for a student with a chronic health condition); or
- Attitudinal barriers including a lack of awareness and understanding about disability (e.g., a professor who refuses to provide extended time for an exam or asks about the disability).

Referrals

It is important to document referrals to other institutional supports or outside resources. In addition to recording the date of the referral, DRPs should send an email to the student with links to recommended resources. Emails or referral forms can be inserted into notes for efficiency and to document a point of contact between the DRP and the student.

Procedures and Expectations

Email and notes are a great mechanism for documenting student's awareness and agreement regarding policies and procedures, including the student's responsibilities. One mechanism for capturing this is a department handbook or an accommodations agreement that includes procedures for requesting and receiving alternative media, note-taking, testing, interpreting/transcribing, and equipment loans. Having procedures in writing allows students to refer back to the procedures as needed.

Documenting Concerns and Complaints

Occasionally, faculty object to accommodations, with concerns that accommodations compromise course objectives or pose fundamental alterations to the program. These objections necessitate consultation with the faculty member and engagement in the interactive process to explore alternatives and make determinations to uphold or alter the accommodation. Notes for these consultations should include the names of all parties in the discussion, correspondence between the parties, a record of items discussed, and the subsequent outcomes.

There are times that despite the best efforts a student is not properly accommodated. When a student alleges that an accommodation was only partially implemented or that the accommodation was not implemented at all, the DRP has a responsibility to investigate the situation and document their findings and the corrective action to ensure this does not occur in the future (See Appendix B: Informal Process for Investigating Student Accommodation Concerns).

The Note "Buffet"

A singular position on best practice for notes is challenging given the multiple demands and needs of DRPs. The philosophy and mission of disability resource provision varies from institution to institution, record-keeping practices in general vary widely, offices are often under-staffed, and each individual situation is unique in its own right. Thus, the "best" notes will look different and will serve different purposes from campus to campus.

What is proposed below is a "buffet menu" of items to consider when writing notes. Some campuses may expect **all** items from the buffet in **all** notes. However, most encounters will require only a few of the items from the buffet. As with much of the work in the DRP field, professionals must make individualized decisions when choosing from the buffet.

Note Buffet Item	When to Incorporate
Disability/Medical History	Generally included as part of the initial meeting note summary. Historical information may need to be added in other notes if student disability/medical status changes or new information is provided. Historical content could include: • Date of diagnosis; • Impact of diagnosis; • Student account of historical experiences; • Daily, on-going, and/or intermittent personal experiences that intersect with environmental barriers (such as slower reading as part of a learning disability that impacts completing tests on time); • Personal strategies utilized; • Technology or aids utilized; • Disability agencies utilized; • Details relevant to this particular situation.
Anticipated or Known Barriers in the Environment	Generally included as part of the initial meeting summary because it aligns with why the student seeks access resources. This topic may need to be added in other notes if the student reports a specific course barrier or access matter arises after the initial meeting. These barriers are often addressed through the accommodations identified as relevant for student use
K–12 Accommodation Use	Generally included as part of the initial meeting summary if discussed.
Previous College Accommodation Use	Generally included as part of the initial meeting summary if discussed.
Prior Use of Assistive Technology	Generally included as part of the initial meeting summary if discussed.
Level of Comfort and Knowledge Regarding Educational Program	Generally included as part of the initial meeting summary if discussed (especially important for graduate and professional students).

Note Buffet Item	When to Incorporate
Future Board or Other Planned High Stakes Exam Accommodations	Generally included as part of the initial meeting summary if discussed or if presented as a concern closer to the high stakes exams.
Review and Analysis of Submitted Documentation	Referenced in notes when the DRP needs to connect the dots between documentation information and access and accommodation outcomes.
Other Pertinent Information	Additional holistic information may be gathered during the initial meeting or could be presented at other times when the information intersects with barriers that need to be addressed. This information could be included in notes for general information purposes or when needed to support decisions and referrals made. Examples of such information include: • Major, minor, and career goals; • Support network; • Clubs and organizations; • Financial landscape including financial aid and scholarships; • Learning styles; • Academic strengths and weaknesses; • Living situation; • Current employment; • Interest in tutoring, counseling, student health, multicultural, career, or recreational services.
Notification of Policies and Procedures	Use email messages and/or DRP database tools to communicate to the student the office policies and procedures relative to the student's specific situation. These notes may need to be done annually, especially if policies and procedures are updated.
Specific Need Matters	Use emails and/or brief notes to capture any subsequent issues presented by the student after the initial meeting. These notes can often be extremely short and direct at the specific request, barrier, or concern presented. Valuable notes on specific matters identify the situation and the action taken to address the matter. DRPs need to use judgment as to when to capture the multitude of specific need matters that are presented on a daily and weekly basis.
Environmental Barriers to Access	It is important to document the barriers present within the environment and the impact of the barriers on student access. Often a DRP addresses a student concern by responding to one of these barriers that may be helpful to articulate in a note: • A physical accessibility issue (e.g., a lack of accessible furniture in the classroom); • A digital accessibility concern (e.g., a lack of captioning on videos); • A restrictive policy challenge (e.g., a course attendance policy that poses a challenge for a student with a chronic health condition); or • Attitudinal barriers including a lack of awareness and understanding about disability (e.g., a professor who refuses to provide extended time for an exam or asks about the disability).

Note Buffet Item	When to Incorporate
Experiential Learning	When students are required to participate in experiential learning courses such as student teaching, co-ops, practicums, field work, clinicals, or internships, the access and accommodation outcomes will likely differ from traditional academic experiences. DRPs should consider documenting the what, why, and how of these experiences by noting such relevant elements as: • Selective placement, restrictions to specific setting, or other barriers in the environment; • Schedule restrictions, for example: No overnight call; • Required or expected competencies or clinical skills that require accommodation; • Concerns about safe patient or client care and how these were addressed; • Need for assistive technology (and possible barriers to its implementation); • Need for ergonomics; • Patient Health Information (PHI) concerns that result from the use of assistive technology; • A record of accommodation implementation and the stakeholders consulted to determine clinical or site accommodations. • In addition to the details, rationales for decisions should be included. An email to the student with a summary of the outcome may be beneficial and serve as a valuable note.
Consults with Faculty/Stakeholders	Use emails and/or brief notes to capture consultations with faculty, staff, or other stakeholders when addressing a specific access situation. Occasionally, faculty object to accommodations, with concerns that accommodations compromise course objectives or pose fundamental alterations. These objections necessitate consultation. A valuable note on a specific matter with a stakeholder identifies the situation, who was involved, and the action taken to address the matter. DRPs need to use judgment as to when to capture the multitude of specific need matters that are presented on a daily and weekly basis
Referrals	Documenting referrals to other institutional supports or outside resources may be resourceful. Emails to students or referral forms can be used as notes in addition to a manual note entry.
Denials	Document all situations in which a student's access or accommodation request was denied and provide rationale for the decision. This documentation may be best in the format of an email to the student (and potentially the professor or other stakeholders) that outlines the decision and the reason.
Litigation	Document more routinely and thoroughly if a student has pursued or strongly threatens the pursuit of litigation

Part V: Examples of Notes

Eligibility Email

Welcome Meeting Summary

Initial Email (detailed notes)

Initial Email (capturing the highlights)

Eligibility Based on Student Narrative

Routine Initial Appointment

Denial of Services

Follow-Up Plan

Additional Accommodations

Collarborating with Faculty to Implement Accommodations

Allegations of Not Providing Accommodations

Based on the elements of notes outlined in the previous section, examples of notes from the authors are provided below and offer the reader a variety of approaches. Readers will note that elements are weighted differently based on the situation.

Sample Note 1 – Eligibility Email

Welcome to (name of school). I have received and reviewed your application for services and am writing to inform you that the information you submitted meets criteria for services. If you would like to complete the process to utilize accommodations, please call our office to schedule your initial appointment by calling (phone number). Please note that the initial appointment is required for you to be eligible to use accommodations beginning at the completion of the initial appointment. During this appointment (which may last up to 2.0 hours), we will discuss history of accommodations and assistive technology that you have found to be helpful, some of the differences between secondary and postsecondary education and/or professional school that you may encounter, impact of disability and barriers you anticipate experiencing as a disabled individual, and what accommodations and resources might be beneficial to you. We will also provide you with training to utilize the accommodations as well as referrals to resources.

Please review the Student Handbook, found on our website at (web address) prior to your appointment. We look forward to getting to know you and working with you throughout your academic journey at (name of school).

Sample Note 2 – Welcome Meeting Summary

DRP met with student for Welcome Meeting. Student is a junior studying biomed and transferred from a community college where she was using accommodations. Student was made eligible for services based on the history of accommodations approved by the community college.

Student reported that she used extra time at her previous college. She reported that the time limit has been a barrier for her exams so far at school here. Student reported that environmental distractions contribute to the difficulty of her ability to finish the exam within the time limit.

Student also reported difficulty taking notes. She mentioned that it is hard to listen and take notes at the same time. She reported that currently, she is audio recording class and reviewing the recording later when compiling notes. DRP informed the student about notetaking technology options and student indicated that Sonocent would be helpful. Training was provided by DR staff on use of this technology.

DRP approved student for extended time (time and a half) in a distraction-reduced environment for exams, audio recording and notetaking technology/word processor for class. Student identified as transgender and asked for campus resources. She was referred to the multicultural center. Student was interested in tutoring services so a referral was made to TRIO.

Sample Note 3 – Initial Meeting (detailed notes)

Student: John Doe
Year: Freshman
Semester: Fall 2017
Courses: (4) Calc I, English 1, Psych 101, Spanish II

John Doe arrived 10 minutes late for his initial appointment. It was observed that the student exhibited rushed speech and appeared distracted as evidenced by his inability to locate a pen/paper to take notes during our meeting–he continually apologized for his tardiness and lack of preparedness. I gave him a few minutes to regroup then began our conversation. John reported that he was diagnosed with ADHD in the spring of his senior

year (6 months ago). This was substantiated by documentation from his psychiatrist, who believes that John experiences functional limitations in areas of attention, working memory deficits, dichotomous processing, and executive functioning. Examples to support the above include: [insert]

John spoke candidly about his condition and indicated that he currently takes Concerta [__mg] 1x daily that was initiated this past summer with moderate success. Success was measured in his ability to filter his language and actions; however, John reports that the Concerta did not improve his other executive functioning skills (e.g., time management, organization). John indicated he had worked with a Learning Specialist /Coach over the summer prior to starting at (name of school). John also disclosed that he is a scholarship athlete and is a recruited member of the varsity Crew team. The team practices daily (6am-8am) and has weekend regattas almost each weekend in the Fall and again in the Spring Semesters.

When asked about accommodations in the past, John indicated he had not received any, so there is no information about what has worked or not worked in previous settings. When asked if he had any thoughts about the types of accommodations, he might need he stated more time for testing, flexibility with deadlines, forgiveness for being late to class, and assistance with notes. He also mentioned he might need help with scheduling of exams when commitments to Crew interfered with class requirements.

- We agreed that 50% extended testing time for all in-class timed exams is appropriate.
- I recommended we look at small group testing for in-class exams coordinated by the DR office.
- We discussed note-taking - we can approach this by using a recording device, via a peer note-taker for his courses, or typing using a computer/tablet. John was excited to try the LiveScribe pen – Student was referred to Terrell Jones, our AT specialist for training and coordination of these needs.
- Regarding tardiness to class, I inquired about his rationale for the request and John explained he did not know why - just that something always seems to happen, or he gets lost in time and is always late for things. I explained that based upon his schedule and the location of his classes, it is not reasonable to assume he would be habitually late for the start of any of his classes. To create an accommodation to allow him to be habitually late would be tantamount to lowering the academic standard for him, and, would be disruptive to the educational environment. We discussed strategies for better time management (e.g. alarms, scheduling,) and I offered him information about our Time Management & Study Strategies program which he could participate in to assist with these challenges.
- We discussed the impact of Crew on his exams etc., for his courses, I explained to him there is a varsity coordinator in the Athletics Office whose job it is to assist with the rescheduling of academic conflicts due to participation in Varsity sports. My office will reach out to the Coordinator in Athletics to inform them of approved accommodations for the upcoming semester.
- We discussed extended deadlines for course assignments. I explained instances where this may be possible and those that make this accommodation impossible to implement.
  - o Psych 1 - possibilities (3 assignments, 2 papers & 2 exams) - will check with faculty
  - o Calc 1 - unlikely weekly problem sets with answers posted 24 hours after due date with 3 exams - will check with faculty
  - o English 1 - 4 papers all drafts are workshopped with peers - will speak with faculty - could be impossible due to peer review components - perhaps on final draft
  - o Spanish II - weekly written and verbal assignments on CMS - will check with faculty.

Finally, we went over the processes to implement accommodations, how letters are delivered to faculty, John's responsibilities for notes and our hopes to develop a partnership with him while he is a student here. His summary email and expectations of the office will be sent within 5 days.

Action Items for DSO

- ❑ Create & Send Faculty letters
- ❑ Make referral to AT Specialist
- ❑ Make referral to TMSS group
- ❑ Contact each faculty member about extensions on assignments
- ❑ Send copy of accommodation letters to Athletic Coordinator
- ❑ Notify Testing Coordinator
- ❑ Send request for volunteer peer note-taker (back-up to LiveScribe pen)

Next Appointment: 4 weeks

Sample Note 4 – Initial Meeting (capturing the highlights)

Student: Sam Lee
Affiliation Term: Fall Semester of (year)

(DRP met with Sam Lee for a Welcome Meeting on (insert date). His student ID number is #########. Sam is a second-year majoring in finance. Post-graduation, he is interested in pursuing his MBA. He is a transfer from a small liberal arts college and started at our college during the current term. Sam has an on-campus job as a tutor in the Chemistry department and works about ten hours per week.

Sam is an individual with a Learning Disability in Written Expression and ADHD, which were originally diagnosed in 2008. He is not currently taking medication for ADHD due to side effects and is comfortable not using medication at this time. In high school, Sam utilized double time on exams, a computer for essay exams, and assistance with note-taking.

His writing fluency and concentration deficits impact his ability to take quality notes, write effectively in a time-limited setting, and focus in an environment with distractions. Sam reported that typing rather than writing is more effective for essay exams and for note-taking.

Based on the student's self-report and supporting documentation, accommodations agreed upon include double time on exams, distraction-reduced testing space – small group setting, computer/Word for essay exams, use of computer for note-taking, and priority registration.
Sam shared during his meeting that he would like to improve his test-taking skills and study strategies so (DRP) referred the student to the Learning Center for academic coaching services.

Sample Note 5 – Eligibility Based on Student Narrative

Student came in for initial appointment with DRP to get affiliated with disability resources. Student disclosed that he has Cerebral Palsy (CP). He is a first-time community college student and indicated that he benefited from special education services when in K-12 education. He graduated high school more than twenty years ago. Student mentioned that he traveled to campus using the local paratransit bus since he is unable to drive due to visual impairment. He stated that he has no use of his right hand so typing using a keyboard is not efficient. He is familiar with dictation programs and finds them useful. Student reports using his iPad to take notes and compose essays has worked well. Student recalls using extra time for exams and thinks he was eligible for double time. His course materials and exams were provided as print enlargements during his K-12 experience. Student does have a laptop and uses both built-in zoom and dictation features. He mentioned that he sometimes uses a screen reader, JAWS, especially when reading long documents. When asked about preferred format, student indicated that he prefers Word documents for course materials and exams so that he is able to enlarge the text on his own.

He reported that 18-point font works well. The student mentioned that scantrons pose a barrier due to the small font and requested to mark answers directly on printed exams.

The student was observed entering the office using a white cane. He walked with a limp and wore a brace on his right leg. During our meeting, he pulled out his iPad to take notes and had his face close to the screen while using high contrast mode. He used a combination of dictation and the iPad keyboard to input information. Student appeared to have no function in his right arm and hand as he only used his left arm and hand to perform tasks.

We agreed upon the following accommodations: extended time (double), Dragon for essay exams, exams as Word document or printed and enlarged to 18 point, ability to write on exams in lieu of using scantrons, course materials in electronic format, access to computer/tablet for in class assignments and note-taking, campus para-transit service, and priority registration.

Sample Note 6 – Routine Initial Appointment

This first-year, traditional student arrived for appointment accompanied by both parents. Disability verification was submitted in the form of an IEP and current psychological assessment. Student self-identified with ADHD and learning disability in the areas of decoding and written expression, as corroborated by the IEP, and the psychological assessment verifies significant restriction in visual memory. Accommodation history indicates a 50% time extension and distraction-reduced setting for tests, test read aloud, test items simplified, and spelling errors forgiven.

We agreed to time extension for exams, distraction reduced setting, reader for exams, use of spellcheck for exams, and use of computer for in class assignments and note-taking. The request for simplified test items was denied, with the explanation that this was a special education service, not a reasonable accommodation. The point went unchallenged because student said they had not used that modification in several years anyway. Therefore, I did not elaborate

Student was given an appointment for service orientation, at which time they will be given their accommodation memos and accompanying materials for course instructors.

Sample Note 7 – Denial of Services

Student arrived for appointment accompanied by a sibling and her partner. She self-identified with ADHD, which she indicated was newly diagnosed. She submitted a handwritten note on a prescription pad from her family practitioner indicating only ADHD and verification that student takes Ritalin. Student stated she has difficulty finishing tests because her mind wanders. She said the medication helps her with filtering out external distractions, but she still cannot seem to focus her thoughts on matters at hand. To my prompt on test outcome today, student said she had not failed any. To my prompt on her high school test-taking experiences, student said she could not recall. To my prompt on how the physician had gone about diagnosing the ADHD, student said she and the doctor had a conversation and there was a brief list of questions. Student denied any limitations with regard to family and social relationships or employment.

Student requested additional time for completing tests, which she said is an accommodation her roommate gets. I denied the accommodation, as I explained to student, on the basis of insufficient information to verify through documentation or through her narrative that she was substantially limited by the ADHD. Though the diagnosis does not appear to have been made through standard practices, we nonetheless do not challenge the physician's authority to diagnose and treat ADHD. We simply seek verification that the ADHD is, for this student, substantially limiting in some major life activity compared with the average person in the general public. While we do not doubt student's difficulties with taking tests as she describes, we have neither current indicators nor known history tying her difficulties to ADHD, and ADHD should impact more than just test taking. Furthermore,

we do not even have information that there were any barriers experienced by the student at all, prior to this first semester in college.

I suggested that if she wishes to submit additional documentation, we are prepared to reconsider her accommodation requests.

Sample Note 8 – Follow-Up Plan

Identification of additional barriers and request for accommodation modification: Adilah is affiliated with DR and is finding that her testing accommodation of time and one-half on exams is not fully effective in providing access. Adilah is requesting an increase in her extended time to double.

Actions taken by DRP: Increasing the timing for the exam is not a difficulty for the institution since the DR center administers exams internally. The extended time was increased to double and an email confirmation was sent to the student and her instructors.

Follow-Up action by student: The student agreed to provide additional documentation from her medical professional to verify adjustments to her medication to support the accommodation modification.

Sample Note 9 – Additional Accommodations

The student came in for her scheduled follow-up appointment (insert date and time). The student reported that she is struggling to complete exams due to increased levels of distractibility because of medication changes and increased occurrence of panic attacks. The student shared that she is rushing to finish exams and as a result, she leaves items unanswered or quickly fills in answers. She stated that she is able to complete about 70% of an exam before she begins to run out of time and rushes. This is not isolated to one exam or course but is happening during multiple exams and courses. The student currently has distraction-reduced space and would like to add extended time as a testing accommodation. Since the student's reasoning is directly related to the disability information on file, extended time, (time and a half) was added to the student's list of accommodations and a new memo was emailed to instructors.

Sample Note 10 – Collaborating with Faculty to Implement Accommodations

(Student) met with me concerning a logistical issue with a professor in an engineering course. This professor administers pop quizzes occasionally at the beginning of class. The student has had problems lately getting to class on time. With his condition, mornings are difficult when his joints and muscles need time to stretch out. Student scheduled most of his classes after noon. However, he has one class at 10:30 am. He has spoken to the professor about the quizzes. He says the professor suggested he come in earlier to get the extra time on the quizzes. The professor reviews the quiz content with the class after he collects them, so student is unable to take the quiz after class. Student claims the professor will administer about 15-20 quizzes during the semester. He will then count the best 10 quiz grades. Quizzes make up about 15% of his grade. Student is wondering what options exist for this class.

I contacted the Testing coordinator and the Professor to see if there are any other solutions to the issue. After a discussion with the professor, it was determined that the student will take the quiz in class if he arrives on time or will be given five reflection questions to answer by the end of the day. This is an accommodation outcome that will fit the needs of this course, but I explained that the student cannot expect this solution in other classes, as it may not be reasonable nor appropriate in other courses.

Sample Note 11 – Allegations of Not Providing Accommodations

Ricardo came in during walk-in hours. He reported that his professor is not providing him with accommodations. He stated that he thinks his professor did not add the extended time and as a result, he only received the class allotted time rather than time and a half. The student was not able to recall the amount of time he received on his exam but did not think it was accurate. The professor was contacted to confirm the class allotted time and the professor mentioned that the class received 50 minutes for the exam. The testing center confirmed the beginning and end times for the exam and reported that the student received 75 minutes to complete the exam. An email was sent to Ricardo confirming that he was properly accommodated, and he did receive his full extended time.

Sample Note 12 – Health Science Focused Initial

In the world of professional or health science education, the stakes get very high. Multiple moving parts make documentation of decisions and actions very important. In these programs, a simple delay in services can be the difference between success and failure in a course. When a student performs poorly in a course, it could mean dismissal. Students at this level of education have invested significant time, energy, and finances and dismissals are often met with litigation. In these unfortunate circumstances, it is critical that a timeline of events can be quickly established including any requests, determinations, provision of accommodations, and response to appeals. These notes also serve as a record of preemptive work including preparation and notification of needs for board exam requests, licensing requirements, discussions about the need to meet technical standards, and any concerns therein. Health science disability resources professionals require considerable time to document eligibility, accommodation decision-making, actions, and critical exchanges with students, faculty, and staff. DRPs must have enough time to properly document these encounters, which serve as a timeline and capture detailed information. These notes also serve as a record of preemptive work including preparation and notification of needs for board exam requests, licensing requirements, discussions about the need to meet technical standards and any concerns therein.

Note:
In this example, the DRPs practice was to send notes to the students as a mechanism for checking in and confirming all of the information. This note, therefore, is in the form of an email to the student.

Bill,

It was a pleasure meeting you today. I wanted to review our meeting with you in writing, to ensure that I accurately understand your history and request for accommodation. Please look over the following and let me know if there is any relevant information you wish to add or if any of the information is inaccurate.

July 28, 2013
I met with Bill today and collected relevant history including: his history of postsecondary education accommodations and medical history, focused on his hearing loss.

Hearing Loss History
Bill was born deaf and received his right cochlear implant at age 5, his left 2 years ago. His right implant is currently failing. Bill describes a "soft failure," meaning that the functional hearing is decreasing significantly. This loss took a significant downward turn this June. His hearing loss is further exacerbated by an electrode loss. Bill is scheduled for corrective surgery during Winter Break. The gradual hearing loss, coupled with the recent decline, explain his decision to reassess accommodations.

Educational and Accommodations History
Bill attended an oral school and English is his first language. In high school, he began learning ASL as a secondary compensatory approach to his hearing loss. Bill received ASL interpreting and note-taking throughout his un-

dergraduate college career. During his first year of medical school, Bill utilized interpreters but given the lack of signs for medical terminology, finger spelling was often substituted for signs. Bill felt that his fluency with finger spelling was not proficient enough for learning and elected to replace interpreters with CART and note taking. During his second year of medical school, he relied solely on notes and CART for support.

The third year of medical school went well according to Bill, but he admits that his performance could have been better had he utilized an interpreter during patient interactions and rounding. He completed the majority of his rotations in clinics vs. the hospital, where it was less noisy and the patient interaction was one on one. During his Ob-Gyn rotation, the hospital used an FM system to enhance speech during surgery. This coincided with the beginning of his hearing loss (soft failure) and was not an effective accommodation.

In addition to an FM system, the preceptor or senior resident would review the surgery with Bill, explain the procedure, and during surgery the OR team used notes to communicate with Bill. For example, during the teaching if the surgeon had a question for Bill someone would write down the question, show it to Bill, and then he would respond. He passed the rotation, but again felt as if he had missed some material.

Bill's last rotation, ICU, became extremely difficult. The noise level in the ICU presented a unique problem. Bill's ability to discriminate between sounds was compromised and he struggled in this rotation. His preceptor suggested that he enlist the help of an interpreter in all future rotations. The ICU rotation ended last week hence the last-minute request for an interpreter.

In order to take calls, Bill uses an application on his iPhone that acts like a relay service. For making outbound calls, for example calling a nursing station, the user dials a number via the apps touchscreen display. A captioning service is looped into a process that takes several seconds and the app then calls the original users device. Upon answering the call, the user is connected to the other party, and the app then captures the text of the conversation. To work, the device must be on a network that offers simultaneous voice and data access. As the caller is speaking, an individual is typing so that Bill can understand. Using any phone, without a text function, is not effective. Bill's pagers have all been text based to facilitate communication with the hospital.

Requested Accommodations:

Surgery

Bill is requesting an interpreter or CART for his surgery time. He is also asking that the attending review the [missing word?] the planned procedure and patient history in advance of the surgery so that he is able to follow along without relying on the presentation during the procedure.

Historically, Bill has been afforded a mechanism for communicating during surgery (pen and paper) and would appreciate having this again as he felt it was helpful. Also, having the attending repeat pertinent information from the surgeon (in the absence of CART or an interpreter) is requested. Bill feels that he will be able to hear the attending if they repeat critical information.

Didactic learning

Bill requests note taking for his didactic educational experiences and grand rounds. He feels that he will not need CART or an interpreter during journal club if his peers use a power point to present their article, as he can read key words and follow along (asking for clarification if necessary).

Education

It is necessary to alert relevant clinical faculty and staff in each hospital (in advance of rotation) to Bill's hearing loss and approved accommodations-especially with regard to the paging system. General information about working with an individual who is deaf/hard of hearing is also helpful as it alerts the team to practical information about best practices for communication and teaching an individual with hearing loss.

A Potential Model for Notes: SOAP Notes

A method of documentation utilized by health care providers and maintained in a patient's chart may prove instructive for DRPs. SOAP is an acronym that identifies four sections of the note—Subjective, Objective, Assessment, and Plan. Given the high stakes and complicated structure of professional school environments, SOAP notes may be the most efficacious approach to documentation. The subjective portion describes the patient's reported condition in narrative form including the patient's chief complaint (i.e., what brought them to the clinic or hospital). The objective portion documents objective, repeatable, facts about the patient's status while the assessment portion contains information about the physician's medical diagnoses for that specific visit (e.g., diagnosis: sinus infection). The last part contains the treatment plan, i.e., the responsibilities and planned actions of both the physician and the patient—including ordering labs, referrals to specialists, medications prescribed, and any procedures that were performed or planned during the visit. In this case, there is no treatment plan per se, but there is usually a list of items that require attention in a structured, time limited way. These can be recorded under the P. While an adaptation of the SOAP model may work well for DRPs in health science or other professional education settings, it is also a viable option for all DRPs since it is designed to record both perspectives of an interaction (student and DRPs) along with the relevant facts of a student's initial meeting and document any planned actions or decisions such as the decision to modify an accommodation.

Part VI: Platforms for Keeping Notes

A Potential Model for Notes: SOAP Notes

Recordkeeping across business systems and professional disciplines has moved from paper to electronic platforms. Today's database systems permit storage of student documentation and notes, while facilitating quick communication with institutional databases such as Banner and PeopleSoft. Some can perform management and tracking of accommodated tests. Some send out automated email correspondence. Four database products developed specifically for postsecondary disability resource programs are available commercially. Each provides an electronic platform for creating and rapidly retrieving notes (see chart). A review of these programs is outside the scope of this paper and are offered here to make the reader aware of their availability for electronically documenting notes in a closed and specialized system.

Product Name	Website
Accessible Information Management (AIM)	https://www.accessiblelearning.com/
Accommodate	http://symplicity.com
Clockwork Enterprise	http://clockworks.ca
Student Accommodation Manager (SAM)	http://www.amacusg.org/amacsam.php

Voice dictation software should be considered as the default method of text entry into electronic records, if disability permits. Today's speech-to-text/dictation software is fast and accurate with minimal financial cost and ease of setup.

Appendix A:
Essential Items for Notes

	Should be Primarily Captured by DR Staff's Professional Narrative	Can be Primarily Captured by Sufficiently-Detailed Emails
Essential: Thoroughly Document	• Registration Meeting notes, including accommodations approved/denied, the reasons supporting the approval or denial, and any accommodations the student turned down. • Changes in student's documented diagnoses, symptoms, or severity of symptoms • Negative interactions related to student's accommodations	• Approval/denial for additional accommodations, including reasoning and (if denial) grievance process • Critical conversations about the student with faculty/staff • Student notifications of policy/procedure changes • Requests for additional documentation
Not Essential	• Positive interactions related to student's accommodations • Interactions with student, positive or negative, not directly tied to student's accommodations • Check-in/recurring appointments • Non-essential student details (e.g. student involvement, interesting facts)	• Typical transactional interactions with students (e.g. request for letters) • Non-critical conversations about the student with faculty/staff • Referrals for student services, external agencies, tutoring, etc.

Appendix B:
Process for Investigating Complaints

Date Complaint Was Presented to DRP:
Name of Complainant: (student name)
Name(s) of Respondents: (instructor name and/or entity such as testing center)
Date of Incident:
Time of Incident:

Summary of Complainant concerns with dates:
(Summary of conversation and/or insert written correspondence)

Summary of information provided By Respondent(s) with dates:
(Summary of conversations and/or insert written correspondence)

Summary of DRP impressions:
(Provide accommodation eligibility information and discuss academic requirements and barriers specific to the complaint)

Outcome/ Resolution:
(Accommodation was provided, or accommodation was not provided or agreed upon alternative accommodations and state the remedies)

Appendix C:
Process for Investigating Complaints

Email intro:
I am working with a group of professionals within the disability resources field to explore the topic of internal office documentation and student notes (when to document notes, how much detail to include, and how broadly or specifically to document a student's experience). The goal of this analysis is to eventually provide guidance on recommended internal documentation practices for disability resource professionals to use as a benchmark for ensuring that quality notes are recorded and maintained.

To start the exploration, we seek your input via the following survey: LINK

Examples of question topics include:
What purposes does documenting interactions serve?
What are key components that you include in notes?
How do you document student responsibilities/student portion of interactive practices/acceptance of accommodations?

At the conclusion of the 5 – 10-minute survey, you will be asked if you would like to be considered for participation in these exploratory discussions at the AHEAD conference in Orlando. A focus group of 20 – 30 people will be created for large and small group discussion for further analysis

Questions:
How frequently do you document student interactions in some sort of student management system?
We document all student interactions
We only document the interactions that seem most critical, most urgent, most likely to lead to complaints, etc.
We document somewhere in between all interactions and the most critical

What is the biggest barrier to providing good documentation?
Time intensive among so many other works demands
Not sure of the best information to provide
Guidance from administrator or legal counsel to limit amount of notes recorded
Lack of electronic platform or filing system
Other:

Do you intentionally use emails as means of documentation by providing students rationale for decisions within your emails?
Yes, always
Yes, depending on the situation
No, we have never considered using email as a means to document decisions

Do institutional or state guidelines influence what you include when documenting interactions?
No
Yes (briefly explain):

What is the order in which you place importance on the following components when determining reasonable accommodations with 1 being the most important?
Third-party Documentation
Student narrative

Professional judgement
University policies
Course/Program Requirements

Why does your office document notes in your management system or student filing system? (Check all that apply)
To protect ourselves in the event of future complaints
To remind ourselves of past decisions made during future student interactions
University requires notes
State legislation requires notes
As a reference for other professionals in the office
Other:

What are key components that you include in your written notes? (Check all that apply)
Disability/Diagnostic information/functional limitations
History of accommodations used in other education settings
Summary of conversation with student
Rationale for access decisions made
Other professional observations and assessments beyond decision rationale
Other:

What elements do you gather for the initial meeting / initial process that you include in the overall file beyond your written notes?
 Documentation from medical professional
Initial student questionnaire
Initial phone/email communication with student
Communication consent information
Records from previous schools or testing entities showing history of accommodations
Other:

Which of the following methods do you use to document your interaction with students after completing an intake?
Complete a form containing a prescribed set of questions with additional notes as needed.
A report in narrative form
I do not conduct an in person, phone, or Skype appointment as part of my intake.
Other:

How do you document the student's responsibilities for implementing accommodations?
Student handbook
Responsibility/Procedural agreements signed by student
Follow-up email with responsibilities outlined in email
Students have no responsibilities we implement all accommodations for student
We do not do something like this.
Other:

If a "best practices" manual was to be created on how to best document student interactions for your files, what elements do you believe would be essential?

What would you want to learn as a result of reading a paper about note documentation practices?

OPEN ENDED