**WRITING CLIENT REPORTS**

Client reports are highly important part of tutoring: we use them to keep records of the work we do for the university, to answer questions faculty might have about their students, and to aid one another in holding productive appointments. While it’s important to share any information about a student you feel might be relevant for a future appointment with your fellow tutors, it is equally important to keep in mind that these reports have a wider audience than our immediate circle. Writing client reports can therefore be a delicate operation, requiring you to balance the need for tact and professionalism with the need to pass on useful information to your fellow peer tutors.

**Anatomy of a Client Report:**

There is no hard and fast rule about what should go into the client report. Since every appointment is different, what will be relevant to note in our records will be different. As a general rule of thumb, however, you should try to record what you did during the appointment and what its outcomes were. Oftentimes, mere specificity about *what* *actually happened* during the appointment conveys volumes in subtext.

Consider the following questions:

* What materials did the student come to the appointment with?
  + Ex: A draft of a paper, a prompt, a study guide, a worksheet.
* What did you do with your time? What specifically did you work on?
* What follow up steps did you discuss with the student?
  + Ex: Student left with a thesis for their paper, we discussed tips for how to study more effectively for future tests, I scheduled them a follow-up appointment.
* Is there any relevant information about the assignment?
  + Ex: The paper is due tomorrow, the test is in an hour, the student was referred to the Center by a professor.

For more tips on writing client reports in other settings, you might also find it useful to read these two links:

* For social workers—http://tinyurl.com/d7p85u3
* For career counselors—http://tinyurl.com/c9oqelh

**Addressing Awkwardness:**

You might be left wondering, “What should I do if I have personal information or insight about a student that isn’t appropriate for a client report but I feel is really important to share?” Sometimes peer tutors find themselves in an awkward interpersonal situation with a student: perhaps they have said something inappropriate or made you feel uncomfortable in some way; maybe they were just plain unpleasant to work with. While you’re right that this kind of exchange isn’t necessarily appropriate to record in a client report, you are in fact encouraged to share this information with Rachael and/or Jordan. We need to be aware if negative patterns begin to develop with the students you meet with, both for your safety and for your success, and we can help you to problem-solve to improve awkward or difficult appointments.

**EXAMPLE CLIENT REPORTS**

**Assignment**: American Economic History Quiz Review

**Notes**: Talked through some comparative statics deadweight loss problems. Covered consumer/producer surplus, what deadweight loss is, and how to find it graphically. Challenge is stripping the "real world" story down into its impact on supply and/or demand, and then going through the mechanics of shifting it all around once that's been identified. Sent her a link to: <http://www.khanacademy.org/finance-economics/microeconomics/v/rent-control-and-deadweight-loss>

**Assignment**: Sociology Research Paper

**Notes**: \_\_\_\_\_\_\_ was referred to the Center for help with developing a schedule for his written work. We worked on setting out time for research, outlining, and drafting a research paper due in one week. We also worked on strategies for breaking down a topic into smaller pieces, and talked briefly about finding scholarly sources.

**Assignment**: CSOC paper

**Notes**: \_\_\_\_\_\_\_ came in with a prompt for a 6-10 page paper (due the next day) and a couple resources. We spent the appointment finding better sources through the library, ones which he could access immediately. I tried to teach him the best strategies for finding sources in journal search engines.

**Assignment**: Lab exam material

**Notes**: \_\_\_\_\_\_\_ came in to do a quick review for her lab exam that she had immediately following our appointment. I mentioned methods she could use in the future in order to facilitate using her labs to study and quiz herself. We made up pneumonics to help her remember more difficult material, such as the parasympathetic and sympathetic nerves and innervations. We may make more appointments in the future.

**Assignment**: Research paper for CONN class

**Notes**: Talked about some challenges she's facing in narrowing her topic. Discussed various options and developed a list of questions for her professor. She has another appointment for Sunday.