Notes Guidelines

Notes created within university systems are an important part of supporting student success. Faculty, advisors, and other student support staff provide a link between departments and help promote consistent advising across campus by documenting interactions with students. Notes also provide important historical and contextual information that can be helpful when working with a student. Be aware that your permissions to write and view notes may vary by system.

Notes are protected under the [Family Education Rights and Privacy Act (FERPA)](#) from being disclosed to outside parties, except under limited exceptions, but can be requested by a student or third-party through a subpoena as part of a student's educational record. Because of this, it is especially important that notes are written in a professional tone and only include academically relevant information. The following guidelines outline important items to consider when writing notes.

- **Enter notes in a timely manner.** It is recommended that notes be entered the same day as the interaction with the student when possible. This ensures accuracy and provides timely information to others working with the student.

- **Write as if your notes will be read by others**. Notes should be as free as possible from judgement, assumptions, or inferences by the author. Stick to the facts (*Do:* "Student expressed difficulty in getting to morning classes." *Don't:* "Student is unmotivated and lacks time management skills."). Refrain from including comments about instructors or other University personnel unless they have a tie to academic progress (*Do:* "Student expressed concern about working with his advisor to discuss degree requirements." *Don't:* "Students hates his advisor.").

- **Summarize and be specific.** Keep notes brief and relevant, and use appropriate abbreviations (see "CatTracks Advising Notes" section). Try to eliminate subjectivity from your notes. Reference each topic, question, recommendation, and referral. Name dates and deadlines, courses, credits, and next steps. If there is room for a question or misunderstanding regarding information provided to a student during an interaction, record details on advice given in case of future questions (*Do:* "Student was advised regarding no duplication of department policy in breadth.").

- **Sensitive or private information should not be included.** Personal information about a student, their health, family, etc. should be handled with discretion. When appropriate, you may consider including general notes to reflect that an event, behavior, or perception is impacting academic progress (*Do:* "Student came in to discuss options as she missed an exam due to personal issues." *Don't:* "Student was in the hospital and missed an exam."). Disclosures and/or referrals regarding a disability or psychological counseling should not be included in your notes. You may consider including a general note indicating a referral was made while not listing the specific office (*Do:* "Student was referred to appropriate office for assistance." *Don't:* "Student was referred to Disability Services to discuss an accommodation for ADHD.").

If you have questions about notes, please contact one of your college advisors or the Student Success Center.

CatTracks Advising Notes

Consider beginning your notes with one of the following abbreviations so others can quickly identify the main purpose of the appointment or note:

ADV: Advisement Appointment
BBA: Bounce Back Appointment
BBW: Bounce Back Workshop (use for documenting advisement related to Bounce Back Workshop)
FAPLAN: Financial Aid Plan
GSO: Graduation Sign Off
INITAPPT: Initial Appointment (use for first appointment with student)
ME: Major/Minor Exploration
NSHW: No Show for Appointment
OTHR: Other
PROSP: Prospective Student
REG: Registration/Class Schedule

To keep all notes as brief as possible, consider using the following abbreviations:

AA: Associate of Arts
AAS: Associate of Applied Science
AI: American Institutions
AS: Associate of Science
ATH: Associate degree total hours
BA: Bachelor of Arts
BIS: Bachelor of Integrated Studies
BS: Bachelor of Science
BTH: Bachelor degree total hours
CA: Creative Arts
CE: Concurrent Enrollment
CIL: Computer & Information Literacy
DEC: Declared Program of Study
DM: Declared Major
DV: Diversity
EC: Early College
EL: Elective
EN: Composition
FL: Foreign Language
GE: General Education
GPA: WSU cumulative grade point average
HU: Humanities
IC: Institutional Certificate
IL: Information Literacy
LS: Life Science
LIC: Licensure
MAJ: Major Requirements
MIN: Minor Requirements
NSO: New Student Orientation
PM: Prospective Major
POS: Program of Study
PS: Physical Science

QL: Quantitative Literacy
RH: Residency Hours
SS: Social Science
ST: Student Teaching
UDH: Upper Division Hours

CAH: Lindquist College of Arts & Humanities
COS: College of Science
CSBS: College of Social & Behavioral Sciences
DCHP: Dumke College of Health Professions
EAST: College of Engineering, Applied Science & Technology
GSBE: Goddard School of Business & Economics
MCOE: Moyes College of Education
SSC: Student Success Center