Guidelines for PeopleSoft Advising Notes

Statement of Purpose:

- Documentation of student interactions is a benchmark of providing excellent student service as we support students throughout their academic careers.
- Adopting a developmental approach to academic success and academic advising allows for intentional, individualized connections between students and the resources, opportunities, and policies of Boise State University.
- Advising notes document student advising interactions. Recording notes consistently and accurately allows for seamless records of students’ needs, progress, and plans for the future.
- We need to change the perception that these are “my notes” and “my students”

Timely, purposeful entries in advising notes provide:

- **Documentation**—record of student interactions, whether face-to-face or via electronic formats
- **Context and history**—allowing for expedient and productive contacts that minimize unnecessary repetition and redundancy
- **Opportunity**—to enhance the advising relationship and connect with students
- **Information Sharing**—a secure, formal, means for the sharing of information between advisors and students
- **Tracking**—development, learning, and progress toward established benchmarks, patterns in behavior or actions to be taken
- **Ongoing assessment**—the ability to monitor student navigation within the university allowing for a holistic view, as students work with and move between advisors, departments, campus services, and other University representatives.

Privacy of Student Educational Records

- “FERPA stands for the Family Educational Rights and Privacy Act of 1974. This legislation protects the privacy of student records and regulates how information is utilized.
- Employment at Boise State University requires, as a term of employment, compliance with the policies of Boise State University; the rules, regulations, and procedures of the Idaho State Board of Education; and all local, state, and federal laws. Faculty and staff are required to review FERPA and sign a FERPA CONFIDENTIALITY AGREEMENT.
- As with any document containing information personally identifiable to a student, PeopleSoft Advising Notes are a part of student education records and are thus subject to FERPA. Training in Boise State’s FERPA practices is available through the web-
based Online FERPA Training. Be mindful that a student can request to view their advising notes under FERPA and must be granted access to the records within 45 days of the request, and they may also be subject to subpoena. Any and all legal requests for student records must be referred to general counsel.

General Content & Practice Guidelines
In preparing to enter Advising Notes in PeopleSoft, ask yourself how the notes contribute to the holistic record of a student’s academic and career pathway. Additionally, ask yourself if the note will maintain appropriate levels of disclosure. Fact-based, descriptive notes help to convey the unique dynamics of each student advising contact. Narrative notes are encouraged for readability and nuanced circumstances, but bulleted summaries can also be effective and readily skimmed in preparation for an appointment.

The following section presents items for consideration and potential inclusion in PeopleSoft Advising Notes. Please take note that not every item will apply to all circumstances or advising conversations; these are intended to be guidelines for determining what is necessary or appropriate for each interaction.

- **Focus on facts and events.** Summarize conversations. Provide information that would/will allow a campus colleague to contextualize the student’s circumstance and the related advice offered. Use objective, non-emotional language. Do not attribute behaviors or intent to the facts.
- **Include relevant information** regarding student’s progress towards degree or career goals, university benchmarks (e.g. Foundational Studies Courses), prerequisites, or major components. Only document information that is directly relevant to the delivery of service.
- **Comment on recommended courses or alternative courses** discussed and how those courses will likely affect progress towards degree completion and/or major exploration
- **If you speculate about an outcome/impact of an action or decision,** be clear with the student (and in your note) to acknowledge the hypothetical nature of your conversation. Make no overt promises if you cannot guarantee the result. Keep in mind that almost no results are guaranteed.
- **Document discussions** of university policies and academic regulations.
- **Cite actions** that were requested of the student and require follow-up.
- **For referrals, include context** to allow the third party to act with clarity and purpose in their interaction with the shared student.
- Document communications outside of advising appointments that are relevant to student’s academic record (e.g. a reminder about how to access/utilize systems such as the Student Center; a phone call about how to withdraw from a course; a query about an Academic Regulation).
- Note transitions (e.g. transfers in/out of a college or the institution; Withdrawal from the University; decision to take a leave of absence).
- Note exceptions granted including why and on what basis they were approved/implemented, as well as who approved the exception (if approval was needed).
- Note stated opinions or decisions pertaining to recommendations made during a current or prior advising appointment (adoption or rejection).
- Note opportunities suggested to or asked about by the student seeking to augment in-class learning and engagement (e.g. volunteer experience, leadership experience, internship).
- Document attributes disclosed by the student that may assist with reference letters or scholarship letters and add value to the advising relationship and future interactions (e.g. student’s interests, student’s aspirations, student’s involvement, or student’s experiences).
- Note reminders for future term considerations.
- In case of a substantive email contact enter a summary in Advising Notes or, if the entire message is relevant to academic record, copy the content into the Advising Notes.
- If noting a change in behavior or concern, report through observation, not accusation or judgment. Subjective comments or opinions speculating about student’s motivations, concerns, or abilities are not appropriate inclusions.

Areas of Concern & Increased Sensitivity
- If recording student’s comments about coursework, perceptions, experiences, etc., employ phrasing to the effect of the student “reported,” “stated,” or “expressed.”
- Information about other students should not be included.
- If recording information, conversations, or referrals of a highly personal or sensitive nature exercise care with the language employed; report academically relevant facts. Focus on steps already taken or steps that are necessary to address the circumstance. Do not diagnose, assess, or offer judgment on the student or circumstance. Consider merely listing the office involved (COEN, COAS, SPS, COED, SILC, etc.) as a prompt for future follow up or check-in without recording details. Alternately, you might
elect to employ a generic statement (e.g. “Student reported facing challenging circumstance. Referred student to [name of department/office].”)

Be sure to document whenever you do refer a student to other offices on campus (academic or non-academic, including for example, Counseling Services, and the Financial Aid Office).

- Regarding financial process or cost information, make no promises if you cannot guarantee the outcome. Include general summary of discussion and note informational and/or office referrals (e.g. “Showed student where to find Tuition and Fees Information on the Boise State website” or “Suggested a proactive contact with Fin. Aid office.”)

- Child Abuse, Sexual Harassment/Sexual Violence (Title IX), & other legal issues – Any mention within Advising Notes should follow cautions above regarding highly personal or sensitive matters. Use extreme discretion with any notes made (e.g. “Student involved in legal matter. Student reported impact on her normal class preparation and attendance.”) Reminder: Do not promise confidentiality to the student. Related information:
  - Remember that as employees of an Idaho institution of higher education we are subject to mandatory reporting of child abuse.

- The Office of Institutional Compliance and Ethics identifies Employee Responsibilities related to Title IX of the Educational Amendments of 1972. Title IX requires Boise State University to respond to certain harassment on the basis of sex, which it knows about or reasonably should have known about. The university must:
  - Investigate what happened.
  - Take appropriate steps to resolve the matter. The University must do its best to eliminate the harassment, prevent recurrence, and remedy effects even if no formal complaint has been made or when a person making a complaint does not wish to further participate in the process.
  - Take interim measures during the investigation to prevent potential further harassment.

- The Office of Institutional Compliance and Ethics provides employee guidance for reporting to disclosures of sexual violence or harassment among its information on assistance, reporting contacts, responsibilities, sanctions, and education/outreach opportunities.
Common Campus Abbreviations for Notes Items

AAE = Advising & Academic Enhancement
AAR = Academic Advisement Report
CID = College of Innovation & Design or Communication in the Discipline
COAS = College of Arts & Sciences
COBE = College of Business & Economics
COEN = College of Engineering
COED = College of Education
COHS = College of Health Sciences
SPS = School of Public Service
Honors = University Honors College
PREREQ: prerequisite (condition to be met before enrollment)
COREQ: corequisite (condition met before or during enrollment)
PERM/INST: permission of instructor required to enroll
PERM/CHAIR: permission of department chair required to enroll
DL = Disciplinary Lens
DRC = Disability Resource Center
DOS = Dean of Students
SILC = Student Involvement & Leadership Center
MLC = Math Learning Center
Fin Aid = Office of Financial Aid & Scholarships
SHS = Student Health Services
CGE – Center for Global Education
NSP = New Student Programs
HR = Office of Human Resources
LSAMP = Louis Stokes Alliance for Minority Participation
STEM = Science, Technology, Engineering, & Math
RAD - NTADV - Required Academic Advising for All New and Transfer Students
RAD-ACDIS - Required Academic Advising for Students returning to Boise State after Academic Dismissal
RAD-ADRPT - Required Academic Advising for Students who have reached the maximum number of repeats
RAD-ADWTH - Required Academic Advising for Students who have reached the maximum number of withdrawals
C/W
NSE - National Student Exchange
FAFSA - Free Application for Federal Student Aid
SAP - Satisfactory Academic Progress
UF – University Foundations
FF – Finishing Foundations

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Guidelines for Advising Notes

1) **Include notes that will help the student**
   a) Student should remember to take the placement exam before enrolling in spring semester classes
   b) Reminded student to have final transcripts sent from College of Southern Idaho to our admissions office as soon as possible
   c) Discussed the importance of repeating ITM 104 and 105 in the summer semester

2) **Include notes that will help future advisors understand the student or the advice you gave**
   a) Encouraged student to enroll in HLTHST 100 due to his interest in Health Care
   b) Explained the DL courses and which specific ones are required for a Finance Degree
   c) Student is only here for one semester and then is transferring to University of Oregon. We discussed the process of requesting official transcripts be sent to U of O

3) **Include list of courses and any alternative courses**
   a) Student is going to enroll in: MATH 123, MUS 100, POLS 101, FRENCH 101 and KIN-ACT 135 (Golf). If KIN-ACT 135 is not available, he is going to enroll in ACAD 107

4) **Include possible consequences of not following advice**
   a) Discussed the need to repeat MATH 143 and earn a passing grade before he will be allowed to enroll in MATH 160. Without MATH 160, he will be delayed in enrolling for COBE upper division
   b) Student wanted to enroll in 18 credits next spring. I reviewed the number of in-class and out-of-class hours needed for each class and also hold her about the overload fee
   c) Reminded student to speak to her Athletics advisor before dropping any classes

5) **Include referrals to other office and departments (being mindful of personal or sensitive referrals)**
   a) Encouraged student to make an appointment with Dr. Spear to discuss his interest in the Public Health – Health Edu. and Promotion program
   b) Referred to the Career Center to take the SIGI test
   c) Referred student to the Student Financial Services to discuss payment plan options

6) **Exclude personal concerns of the student, comments regarding instructors/professors and personal judgements**
   a) Student is not motivated to succeed in classes and will probably be dismissed (WRONG)
   b) Student is failing a class because of the way his CHEM 101 instructor is teaching the class (WRONG)
   c) Parents are getting divorced and the student is having a hard time adjusting (WRONG)
   d) Student is going to court and will miss classes (WRONG)
   e) Student is transitioning genders and is missing class to meet with their health care provider (WRONG)