

UC DAVIS

OASIS Notes Guidelines

The following guidelines are intended to assist advisors in determining what is necessary and appropriate to provide in OASIS notes.

Important: Information entered into OASIS notes is subject to the Family Educational Rights and Privacy Act (FERPA), State of California Education Code and UC System wide Policies and Procedures. Questions regarding FERPA or applicable campus policies can be directed to studentprivacy@ucdavis.edu.

Purpose:

The OASIS notes feature is intended to provide a place for advisors to:

- Provide context and history that can result in more expedient, productive, and personalized interactions with students
- Document and share, with other advisors or appropriate UC Davis representatives, key information from all student interaction, including: in-person, telephone, email, Zoom, text or other electronic communication

Please note: students can request their OASIS notes via a Records Request, so your notes should always be written with the knowledge that the student may see them.

OASIS notes:

- Include student's degree progress or career goals
- State any exceptions and substitutions made
- Report any specific university policies and academic regulations discussed
- Cite referrals to other academic and non-academic offices
- Refer to supporting documents uploaded in OASIS and attached to note
- Include only information about the student

Categories for framing sensitive information:

Do not use details, instead use umbrella categories to avoid biased language and protect the student:

- Distressing event (e.g., assault)
- Legal matters (e.g., divorce)
- Health & wellness matters (e.g., physical and/or mental health)
- Social matters (e.g., extracurricular activities interfering with academics)

OASIS note writing tips:

- Be clear, concise, and precise
- Use the student's name, gender neutral pronouns, or "the student"
- Do not offer a diagnosis, assessment, prejudice, stereotype or judgment regarding the student's person or circumstance
- Be fact based
- Use phrasing such as student "reported," "stated," or "expressed" when recording statements from students.
- Words to avoid unless quoting the student: abnormal, abusive, anxious, dangerous, delusional, demanding, hysterical, immature, impulsive, irrational, overwhelmed, resistant, suicidal, threatened, troubled, uncooperative, unfit
- Do not include subjective comments or opinions regarding the student's behavior or concerns
- Be accurate and complete
- Use strong verbs such as advised, assessed, assisted, clarified, confronted, counseled, discussed, directed, encouraged, focused, identified, recommended, referred, summarized, supported, urged
- Be timely; your notes will help other advisors support the student
- Should not include slang or clichés

Examples of suggested notations to frame a note:

- Degree check:
- Major degree check:
- Email:
- Probation Advising:
- Late Drop Approved:
- Late Drop Denied:
- Late Drop Pending:
- Permission to Add Approved:
- Academic Status:
- Subject to Dismissal:
- Drop In:
- Graduation Check:

Campus Abbreviations:

We **do not** recommend using abbreviations that cannot be Googled (internet searched e.g., SHCS, Student Health and Counseling Services). Explaining abbreviations benefits new campus employees or other offices that may not use abbreviations the same way. When in doubt, don't abbreviate! Note all abbreviations used in examples below are easily found in a Google search.



Notes Examples

“Drop in: Student was tearful throughout advising appointment. Student stated ‘I just can’t do this anymore.’ I suggested walk with student to SHCS and student agreed. I will follow-up with student via email tomorrow.”

“Meeting to discuss readmission. Student indicated current grades in CMN 3 and FST 1 are better than B and should eliminate balance point deficit. Also stated readmission application had been submitted last week. Advised that when grades posted and balance point deficit was eliminated readmission can be approved.”

“Email: At student’s request, sent email to Sac City College advisor to verify that ELWR has been satisfied. Please see attached document”

“Readmission discussion. Student plans to stay in Davis this year and attend SS’14 to clear deficit. Strongly recommended student consider attending Sac City College during Spring semester to make progress toward GE or major prerequisites. Reviewed readmission process and deadlines. Advised student to contact our office with any questions while away from UC Davis.”

“Drop In: Stefanie came in to talk about adding a minor in Political Science. I advised the student to speak with the advisors in the Political Science Department for more detailed information. I gave the student information and/or brochures on the UC Center Sacramento Program, UCDC, and Study Abroad. I encouraged the student to attend the information sessions for these programs and also showed Stefanie where to look for more information. I also advised the student to speak with the Financial Aid Office for concerns on how these programs will affect financial aid.”

“Degree check: Reviewed major progress and updated academic plan. Student plans to take ECN 100A, ECN 101, ECN 115A and ECN 122 next quarter. Did not recommend 4 econ classes and strongly recommended student modify schedule to include no more than 2 econ classes. Discussed interest in graduate school after graduation and referred to pre-graduate advising.”