ADVISOR SET UP, TRAINING, DEVELOPMENT AND RESOURCE GUIDE

Updated Spring 2015

Advising Administrators Board Sub-Committee:

John Reavis, Julie Givans, Cynthia Rasmussen, Kimberly Keck, Jean Boyd

Advising Administrators Board

Arizona State University

ADMINISTRATOR'S CHECKLIST

Before Arrival

___ Complete Human Resources new hire paperwork

___ Set up New Employee Orientation with Human Resources

___ Coordinate training with appropriate staff

___ Put together training materials

___ Make sure office has supplies

___ Schedule campus tour

___ Announce new hire to appropriate staff

___ Complete paperwork required for office keys

___ Coordinate phone setup

___ Reserve parking for first day

Upon Arrival

___ Send out notice of employee's arrival to staff

___ Make sure employee has turned in all HR paperwork

___ Have employee sign for office keys

___ Give employee time to get parking decal

___ Give employee time to set up office

___ Set up computer, ASUrite ID and password

___ Office tour, introduce to staff

After employee has EMPL ID and Outlook Account

___ Online FERPA training

___ Request DARS access for audits and exceptions

___ PeopleSoft and DARS training

___ Fire Safety training

___ Information Security training

___ Request that employee be added to CAA distribution list

___ Order business cards and name tag

___ Order name plate

___ Make sure employee has NACADA membership

___ Add employee to appropriate distribution lists (including ASU Online)

___ Add employee to advisor website

___ Request update to PS/MyASU advisor committees

___ Add employee to AdvisorTrac

___ Salesforce training

___ Make sure employee is enrolled in University Academic Advisor Training on Blackboard

___ Make sure employee has a mailbox

___ Provide access to shared drive

___ Make sure employee gives calendar access to appropriate people and vice versa

___ Allow time to get SunCard

NEW ADVISOR'S CHECKLIST

General Preparation

___ New Employee Orientation

___ Complete any remaining paperwork (I9, direct deposit, etc.)

___ Sign for office keys

___ Purchase parking permit

___ Set up office

___ Set up computer, ASUrite ID and password

___ Kuder Assessment

___ Let Me Learn

___ Create Directory Profile

Online Trainings

___ FERPA

___ Information Security

___ Fire Safety

___ Basic PeopleSoft Navigation

___ Advising 101

___ Advising 201: Program Plan Update

___ Advising 201: Use advising notes and place holds

___ Student Groups

___ Quick Enroll

___ Salesforce

Training Outline

Conceptual

Vision/Mission Statements

- University Governance and Organization
  - ASU President's vision http://president.asu.edu/library/asuvisionandgoals
  - Office of the University Provost https://provost.asu.edu/
  - Diversity at ASU: https://diversity.asu.edu/
  - Retention & graduation mandates/rates
  - Campus Structure

- College vision/overview/organization
  - History and Philosophy of College and College Advising
  - Organizational Chart

Advising Overview

- The Global Community for Academic Advising (NACADA):
  http://www.nacada.ksu.edu/
  - Pillars of Academic Advising
    - Concept of Academic Advising:
      http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Concept-of-Academic-Advising.aspx
    - Core Values of Academic Advising:
      http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Core-values-of-academic-advising.aspx
    - CAS Standards for Academic Advising:
      http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/CAS-Advising-Standards.aspx

- Advising is teaching / a learning experience for students
  - Advisor responsibilities and attributes
  - Student responsibilities (in advising context)

- o Student learning outcomes

- □ Advising Model
  - o At ASU
  - o In your college

- □ Professional Office Practices
  - o Internal
  - o External

- □ Talking Points

Curriculum Overview

- □ Curriculum
  - o "Why do I have to take these classes?"
  - o Academic/curriculum resources
  - o Role of your graduates in society

Legal and Student Conduct Issues

- □ Legal & Ethical
  - o What are advisors held accountable for or not
  - o FERPA
    - ▪ Confidentiality of records
    - ▪ Coping with parents
    - ▪ Consent for access, FERPA restrictions, proxy forms
- □ Student Life http://www.asu.edu/studentaffairs/studentlife/
  - o Code of Conduct
  - o Rights and Responsibilities
  - o What to do in cases of inappropriate student behavior
  - o "Counseling" restrictions on advisors

Informational and Relational

Systems

- □ PeopleSoft
  - ▪ Request access
  - ▪ Training is on-line via Blackboard
  - ▪ Advisor 101 and 201 training
  - o Which students need to be **ADVISED** (cleared)
  - o How to do it
  - o Notes screen – make notes on all your student contacts and appointments

- □ eAdvisor (critical tracking)
  - o eAdvisor Academic Program Search:
    https://webapp4.asu.edu/programs/t5/undergrad
  - o Requirements/critical courses

- On track/off-track guidelines
- Tracking tools (in PeopleSoft and elsewhere)

- DARS (Degree Audit Reporting System)
  - Request access
  - Training, on-line at: http://provost.asu.edu/dars/training
    - DARS audit options – when & how to run
    - How to interpret a DARS audit
    - Posting DARS exceptions

- MyASU
  - Student resources
  - Advisor resources
  - Blackboard

Facilities and Locations

- Campus Tour and Unit Tour
- Campus Map

Student Files

- Student Files/Documentation
  - Overview
  - Processes and Accountability

Student Financial Resources

- Financial Aid overview http://students.asu.edu/financial-aid
  - Consortium Agreement

- Scholarships overview http://students.asu.edu/scholarships
  - University general scholarship
  - Unit scholarships

Student Life

- Student Organizations
- Unit programs/activities

Career Services
- Overview   http://students.asu.edu/career
- Unit career services (if you have them)
- Internships

Admissions

- University Admission: https://students.asu.edu/apply
  - Requirements

- o Applying for admission

- ▫ College Admission
  - o Initial admission requirements
  - o Change of Major requirements

Readmissions

- ▫ University Readmission http://students.asu.edu/readmission
  - o Readmission requirements
  - o Applying for readmission
  - o Low-cum Appeals
  - o Academic Renewal
  - o Leave of Absence

- ▫ Reinstatement
  - o Reinstatement requirements
  - o Applying for reinstatement

Degree Requirements

- ▫ Catalog: http://catalog.asu.edu/
  - o Determining catalog year
  - o Catalog year eligibility requirements

- ▫ Curriculum & Graduation Requirements
  - o University Requirements
    - ▪ First Year Composition requirement
    - ▪ General Studies
      - • Core areas
      - • Awareness areas
    - ▪ ASU 101
  - o College Degree Requirements
    - ▪ Department/Majors –to be covered in depth by current advisor in the major/department
  - o Minors/Certificates
    - ▪ Minors only with a major
    - ▪ Certificates can stand alone
  - o Concurrent degrees
  - o Exploring majors http://www.asu.edu/programs/

- ▫ Returning/Old Catalog Students
  - o Rebuilding program of study/courses needed
  - o PRC/ordering transcripts/microfilm copies from Academic Files
  - o General Studies determinations
  - o Check sheets and Program of Study (on-line and paper)

- ▫ Graduation
  - o Filing for Graduation
  - o Graduation Ceremonies

Scheduling and Registration

- Course Scheduling
  - Co- and pre-requisites
  - Schedule of Classes - https://webapp4.asu.edu/catalog/

- Registration http://students.asu.edu/node/33
  - Drop/Add and withdrawal policies
  - Deadlines and timelines: https://students.asu.edu/academic-calendar
  - Fall & Spring – registration dates
  - Overload requests
  - Course prerequisite override requests
  - Section full override requests
  - Time conflict override requests
  - Late drop/add
  - Late withdrawal
  - Repeat Policy
  - Duplications of credit
  - Grade Replacement Policy
  - Tuition Installment Plan

Grading

- Grading options
- Grade Grievance Policy and Procedures

Student Populations

- Freshmen
  - Orientation
    - Required for freshmen who will start in the fall
      - English placement
      - Math in the first semester
        - Math placement test(s)
          - ALEKS
        - MAT 110 rules
      - Special course requirements for freshman (if you have any)
      - AP Credit rules
      - IB/ Dual Enrollment rules
      - CLEP tests and credit
    - "Cohorts"
  - During the freshman semester
    - Important Dates
    - Early Academic Status Reports
    - Mid-Term Academic Status Reports
  - Spring registration for new or continuing ASU freshmen
  - Relational: what freshmen students need

- ○ Residence Life http://www.asu.edu/studentaffairs/reslife/

- ▫ Graduation Check
    - ○ Who, what, why
        - ▪ Student graduation check list (what a student needs to do looking forward to graduation)
        - ▪ Advisor graduation check list (what an advisor needs to check when meeting with a student looking forward to graduation)
    - ○ Career Services, Internships, Research, Grad School

- ▫ Transfer Students https://transfer.asu.edu/
    - ○ Transfer Orientation
    - ○ Relational: What these students need
    - ○ Transfer Credits: https://transfer.asu.edu/credits
        - ▪ First Year Composition
        - ▪ University General Studies
        - ▪ Religion classes from faith based colleges & universities
        - ▪ Quarter hours v. semester hours
        - ▪ Upper division
        - ▪ Requesting evaluations
        - ▪ In-state vs. out-of-state
        - ▪ Posting DARS exceptions (see DARS section of the training outline)
        - ▪ Timeline for exceptions
    - ○ Course Equivalency Guide (CEG) - http://aztransfer.com/
    - ○ Arizona General Education Curriculum (AGEC)
    - ○ College Source - http://collegesource.org/

- ▫ Study Abroad and Exchange
    - ○ Overview of Center for Global Education Services: https://studyabroad.asu.edu/
    - ○ Differentiate Study Abroad and Exchange
    - ○ Expectations, forms, and timelines

- ▫ Special Student Populations
    - ○ International students: https://students.asu.edu/international
        - ▪ Hard copy transcripts from International Admissions office
        - ▪ Course evaluation/descriptions – special needs
        - ▪ MUST be enrolled full-time (by first day of classes)
        - ▪ "IPO" credit
        - ▪ CPT and OPT forms
    - ○ Student Athletes
        - ▪ Special advising needs
        - ▪ ICA advising overview
    - ○ Barrett, The Honors College - http://barretthonors.asu.edu/
        - ▪ What it is
        - ▪ How to tell who is in it
        - ▪ Basic requirements
    - ○ Culturally diverse students http://diversity.asu.edu
    - ○ ROTC & AFROTC students
        - ▪ Forms & expectations
        - ▪ http://armyrotc.com/edu/azstate/index.htm

- http://afrotc.asu.edu/
  - Students with disabilities http://www.asu.edu/studentaffairs/ed/drc/
  - Veterans
    - Veteran services: https://veterans.asu.edu/
    - Veteran forms and procedures
  - First generation
  - Adult Re-entry
  - On-line learners: http://asuonline.asu.edu/
  - LGBTQA – Safe Zone training http://www.asu.edu/safezone/
  - Pre-law : http://prelaw.asu.edu/ Foundation Building #110 (480) 965-6506
  - Pre-health: http://prehealth.asu.edu//   Foundation Building #110 (480) 965-2365

Academic Standing

- Good Standing
  - University requirements
  - College requirements
- Probation
  - Timing
  - Standards, procedures and processes
  - Relational – what these students need; what to ask the students
  - Common referrals & consequences
- Disqualification
  - Timing
  - Standards, procedures and processes
  - Relational – what these students need; what to ask the students
  - Common referrals & consequences
- Ineligible
  - Timing
  - Standards, procedures and processes
  - Relational – what these students need; what to ask the students
  - Common referrals & consequences
- Academic Renewal
- Who can make exceptions to the rules

Transitional Advising

- GPA policies
  - Changes of major within your unit
  - Changes of major to Exploratory
    - Less than 45 credits
    - 45 credits or more
  - Changes of major from other ASU colleges/schools into your unit
    - Requirements
    - Process and forms
- Students who are not succeeding in their current major
  - "Off track" students
  - Ineligible students
  - Probation students
  - Disqualified students

- ▫ Change of major
  - o Policies & Procedures
    - ▪ Meeting with students
    - ▪ Relational – what these students need
    - ▪ Student/paperwork flow
  - o No more blackout dates

Petitions
- ▫ College & university standards committees
  - o Curriculum Petition
  - o Academic Record Change for a Prior Semester
  - o Medical and Compassionate Withdrawals
  - o Petition forms, policies and procedures
  - o Timing

Training Implementation
- ▫ Shadowing
  - o Shadowing other advisors
  - o Veteran advisor(s) shadow advisor trainee
- ▫ Mock scenarios
- ▫ Work checked by trainer/mentor

On-going/Future Training
- ▫ Mentoring
- ▫ Professional Development
- ▫ Best Practices
- ▫ Advising Styles
- ▫ Student Communication and Learning Styles
- ▫ Advising Scenarios/Mock Advising
- ▫ Shadowing
- ▫ Refreshers
- ▫ Training needs based on evaluations/assessments
- ▫ "Hot" topics
- ▫ Advising Network and Community
  - o Unit advisor meetings
  - o ASU Council of Academic Advisors (CAA)   http://caa.asu.edu/
  - o National Academic Advisors Association (NACADA) - http://www.nacada.ksu.edu/index.htm
  - o Awards
    - ▪ Unit advising award(s)
    - ▪ CAA Excellence in Academic Advising

The Academic Advising Year

January	Disqualification/Probation Reports Critical Tracking Reports Withdrawn from graduation reports Classes dropped for students off-track 2 times who have not changed major Students dropped from classes for which they did not successfully complete the pre-requisite Start of Spring Semester – new freshmen, new transfer students, new international students Drop/Add, Late Drop/Add, complete withdrawal prior second week of class & after second week of class
February	Deadline to file a leave of absence 21st Day Academic Status Reports eAdvisor/Critical Tracking audit/major map verification Outreach to continuing students, encouraging advising before enrollment appointments start Summer & Fall schedules come on-line Students term-activated for summer & fall Summer registration starts Orientation Training eAdvisor Holds
March	Freshman Orientation Begins (continues through end of June) Fall Enrollment Appointments Start Spring Break Academic Status Reports
April	Out of State Orientation Programs Begin outreach to continuing students who have not yet registered for Fall term Graduation Filing Deadline Course Withdrawal Deadline
May	Out of State Orientation Programs Complete withdrawal deadline Last transaction deadline Reading Day & Final Exams Commencement & Convocations Withdrawn from graduation reports Disqualification/Probation Reports Critical Tracking Reports Review of DARS verification audits
June	Summer Session 1 starts, shortened drop/add period
July	Summer Session 2 starts, shortened drop/add period Preparation for Teaching Student Success course
August	Classes dropped for students off-track 2 times who have not changed major Students dropped from classes for which they did not successfully complete the pre-

	requisite Fall Welcome Fall term starts– new freshmen, new transfer students, new international students Drop/Add, Late Drop/Add, complete withdrawal prior second week of class & after second week of class Withdrawn from graduation reports Teach student success course (all term)
September	Deadline to file a leave of absence 21st Day Academic Status Reports Outreach to continuing students, encouraging advising before enrollment appointments start Winter schedule comes on-line eAdvisor Holds NACADA National Conference
October	Students term activated for winter & spring Winter Term registration starts Graduation Filing Deadline Spring schedule comes on-line
November	Spring Term enrollment appointments start Course withdrawal deadline Begin outreach to continuing students who have not yet registered for Fall term
December	Complete withdrawal deadline Last transaction deadline Reading Day & Final Exams Commencement & Convocations Disqualification/Probation Reports Critical Tracking Reports Winter Session

List of Resources and Referrals

Advisor's Tool Box	
How do I find a major specific advisor at ASU?	https://students.asu.edu/advising/directory?destination=node/11750
Where is the alphabetical list of Major Maps	https://webapp4.asu.edu/programs/t5/undergrad
Where can I find the ASU GPA Calculator?	https://students.asu.edu/gpa-calculator
What is the link for the free electronic publication about academic advising?	http://www.psu.edu/dus/mentor/
Where can I find campus wide advising resources?	http://caa.asu.edu/resources
What's new with the Council of Academic Advisors?	http://caa.asu.edu/resources
Where can I find out information about the National Academic Advisors Association? (NACADA)	http://www.nacada.ksu.edu/index.htm
I need help using People Soft	http://www.asu.edu/oasis/support/JobAids.html
Where can I find DARS resources?	http://provost.asu.edu/dars
Where is the link for the ASU Catalog?	http://catalog.asu.edu/

Student Behavioral/Mental Health Issues	
Where do I refer a student who indicates they are not motivated, tired all the time, and getting poor grades?	Counseling & Consultation http://students.asu.edu/counseling Clinical Psychology Center http://www.asu.edu/clas/psych/clinic/
Who needs to know about a student who exhibits threatening behavior?	http://www.asu.edu/studentaffairs/crisis/

Campus Resources and Referrals	
Which office has information about student clubs and activities?	http://students.asu.edu/campus-life
Where can I find a link to tutoring/university academic success programs?	https://tutoring.asu.edu/
What is the link for Career Services?	http://students.asu.edu/career