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
Training Outline

Conceptual

Vision/Mission Statements

- University Governance and Organization
  - ASU President’s vision [http://president.asu.edu/library/asuvisionandgoals](http://president.asu.edu/library/asuvisionandgoals)
  - Office of the University Provost [https://provost.asu.edu/](https://provost.asu.edu/)
  - Diversity at ASU: [https://diversity.asu.edu/](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

  - Pillars of Academic Advising
    - Core Values of Academic Advising: [http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Core-values-of-academic-advising.aspx](http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Core-values-of-academic-advising.aspx)

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

- Advising Model
  - At ASU
  - In your college

- Professional Office Practices
  - Internal
  - External

- Talking Points

Curriculum Overview

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

Legal and Student Conduct Issues

- Legal & Ethical
  - What are advisors held accountable for or not
  - FERPA
    - Confidentiality of records
    - Coping with parents
    - Consent for access, FERPA restrictions, proxy forms

  - Code of Conduct
  - Rights and Responsibilities
  - What to do in cases of inappropriate student behavior
  - “Counseling” restrictions on advisors

Informational and Relational

Systems

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

- eAdvisor (critical tracking)
  - eAdvisor Academic Program Search: [https://webapp4.asu.edu/programs/t5/undergrad](https://webapp4.asu.edu/programs/t5/undergrad)
  - 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](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**

  - Consortium Agreement

- Scholarships overview [http://students.asu.edu/scholarships](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](http://students.asu.edu/career)
- Unit career services (if you have them)
- Internships

**Admissions**

- University Admission: [https://students.asu.edu/apply](https://students.asu.edu/apply)
  - Requirements
Applying for admission

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

Readmissions

- University Readmission [http://students.asu.edu/readmission](http://students.asu.edu/readmission)
  - Readmission requirements
  - Applying for readmission
  - Low-cum Appeals
  - Academic Renewal
  - Leave of Absence

- Reinstatement
  - Reinstatement requirements
  - Applying for reinstatement

Degree Requirements

- Catalog: [http://catalog.asu.edu/](http://catalog.asu.edu/)
  - Determining catalog year
  - Catalog year eligibility requirements

- Curriculum & Graduation Requirements
  - University Requirements
    - First Year Composition requirement
    - General Studies
      - Core areas
      - Awareness areas
    - ASU 101
  - College Degree Requirements
    - Department/Majors –to be covered in depth by current advisor in the major/department
  - Minors/Certificates
    - Minors only with a major
    - Certificates can stand alone
  - Concurrent degrees

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

- Graduation
  - Filing for Graduation
  - 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
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://afrotc.asu.edu/](http://afrotc.asu.edu/)
  - Veterans
    - Veteran services: [https://veterans.asu.edu/](https://veterans.asu.edu/)
    - Veteran forms and procedures
  - First generation
  - Adult Re-entry
  - Pre-law: [http://prelaw.asu.edu/](http://prelaw.asu.edu/) Foundation Building #110 (480) 965-6506
  - Pre-health: [http://prehealth.asu.edu/](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
  - Policies & Procedures
    - Meeting with students
    - Relational – what these students need
    - Student/paperwork flow
  - No more blackout dates

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

**Training Implementation**
- Shadowing
  - Shadowing other advisors
  - 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
- Refresher
- Training needs based on evaluations/assessments
- “Hot” topics
- Advising Network and Community
  - Unit advisor meetings
  - ASU Council of Academic Advisors (CAA) [http://caa.asu.edu/](http://caa.asu.edu/)
  - National Academic Advisors Association (NACADA) - [http://www.nacada.ksu.edu/index.htm](http://www.nacada.ksu.edu/index.htm)
  - 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  
<p>| Students dropped from classes for which they did not successfully complete the pre- |</p>
<table>
<thead>
<tr>
<th></th>
<th>requisite</th>
<th>Fall Welcome</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fall term starts– new freshmen, new transfer</td>
<td>new international students Drop/Add,</td>
</tr>
<tr>
<td></td>
<td>students, new international students</td>
<td>Late Drop/Add, complete withdrawal</td>
</tr>
<tr>
<td></td>
<td></td>
<td>prior second week of class</td>
</tr>
<tr>
<td></td>
<td></td>
<td>&amp; after second week of class</td>
</tr>
<tr>
<td></td>
<td>Withdrawn from graduation reports</td>
<td>Teach student success course (all term)</td>
</tr>
</tbody>
</table>

| September            | Deadline to file a leave of absence          | 21st Day                               |
|                      | Academic Status Reports                      |                                        |
|                      | Outreach to continuing students, encouraging| advising before enrollment appointments|
|                      | 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

<table>
<thead>
<tr>
<th>Question</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find a major specific advisor at ASU?</td>
<td><a href="https://students.asu.edu/advising/directory?destination=node/11750">https://students.asu.edu/advising/directory?destination=node/11750</a></td>
</tr>
<tr>
<td>Where is the alphabetical list of Major Maps</td>
<td><a href="https://webapp4.asu.edu/programs/t5/undergrad">https://webapp4.asu.edu/programs/t5/undergrad</a></td>
</tr>
<tr>
<td>Where can I find the ASU GPA Calculator?</td>
<td><a href="https://students.asu.edu/gpa-calculator">https://students.asu.edu/gpa-calculator</a></td>
</tr>
<tr>
<td>What is the link for the free electronic publication about academic advising?</td>
<td><a href="http://www.psu.edu/dus/mentor/">http://www.psu.edu/dus/mentor/</a></td>
</tr>
<tr>
<td>Where can I find campus wide advising resources?</td>
<td><a href="http://caa.asu.edu/resources">http://caa.asu.edu/resources</a></td>
</tr>
<tr>
<td>What’s new with the Council of Academic Advisors?</td>
<td><a href="http://caa.asu.edu/resources">http://caa.asu.edu/resources</a></td>
</tr>
<tr>
<td>Where can I find out information about the National Academic Advisors Association? (NACADA)</td>
<td><a href="http://www.nacada.ksu.edu/index.htm">http://www.nacada.ksu.edu/index.htm</a></td>
</tr>
<tr>
<td>I need help using People Soft</td>
<td><a href="http://www.asu.edu/oasis/support/JobAids.html">http://www.asu.edu/oasis/support/JobAids.html</a></td>
</tr>
<tr>
<td>Where can I find DARS resources?</td>
<td><a href="http://provost.asu.edu/dars">http://provost.asu.edu/dars</a></td>
</tr>
<tr>
<td>Where is the link for the ASU Catalog?</td>
<td><a href="http://catalog.asu.edu/">http://catalog.asu.edu/</a></td>
</tr>
<tr>
<td><strong>Student Behavioral/Mental Health Issues</strong></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
</tbody>
</table>
| 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/ |

<table>
<thead>
<tr>
<th><strong>Campus Resources and Referrals</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Which office has information about student clubs and activities?</td>
<td><a href="http://students.asu.edu/campus-life">http://students.asu.edu/campus-life</a></td>
</tr>
<tr>
<td>Where can I find a link to tutoring/university academic success programs?</td>
<td><a href="https://tutoring.asu.edu/">https://tutoring.asu.edu/</a></td>
</tr>
<tr>
<td>What is the link for Career Services?</td>
<td><a href="http://students.asu.edu/career">http://students.asu.edu/career</a></td>
</tr>
</tbody>
</table>