Transition Advising Best Practices
Updated to include: Change of Major Request Tool Best Practices (April, 2019)

Objective: work towards an ideal transition advising model based on the Advising Service Values

Desired Outcomes:
- Define transitional advising
- Decrease amount of steps students take in changing major
- Make it easy for academic units to manage
- Develop online experience to help facilitate the process for both students and advisors.

Transitional Advising Defined
Academic advising that supports students' transition from one major to another. Students in transition may be doing so willingly or are required to do so based on academic performance. Both the college of the student’s original major (referred to as the sending major/college) and the college the student is transitioning into (referred to as the receiving major/college are responsible for providing transition advising.

Decrease Steps for Students
The first advisor who becomes aware of a student’s plans to change major (by choice or requirement) is responsible for ensuring the student transitions successfully to a new major and enrolls in courses. The Change of Major Request process was specifically developed to reduce the number of steps it takes students to change their major, streamline the communication process and create a data trail which can be used to further understand student behavior patterns and suggest appropriate advisor action to care for these students.

Expectations for Sending College:
Attitude
1. Normalize changing of majors when in the best interest of the student.
2. Connect the change of major process with the student’s goals.
3. Present the change in a positive light that supports a growth mindset.
4. Take responsibility for the student’s successful transition until they enroll in courses in the new major.

Available
1. Follow up regularly with students who indicate any interest in changing majors until the student makes a decision (to stay or to transition).

Knowledge
1. Students in transition have many options, all advisors should be knowledgeable of all degree options and the tools (me3, Degree Search, What If audits, etc.) available to explore them in order to provide students with multiple paths to their goal.
2. Support student in making multiple plans (as needed): run graduation and what-if audits; make basic schedule recommendations; understand GPA requirements of new program
3. Present options using student’s language, not institutional policy jargon.
4. Include comprehensive notes that includes the student’s story to avoid them having to retell it at every appointment.

Expectations for receiving college:

**Attitude**
1. Establish a welcome protocol for students transitioning into your academic unit.
2. Normalize changing of majors when in the best interest of the student.
3. Connect the change of major process with the student’s goals.
4. Present the change in a positive light that supports a growth mindset.

**Available**
1. Be flexible in type of appointments to be as responsive as possible to students in transition.
2. Establish a plan for meeting the needs of students in transition to enroll in the next term during peak periods.

**Knowledge**
1. Students in transition have many options, all advisors should be knowledgeable of all degree options and the tools (me3, Degree Search, What If audits, etc.) available to explore them in order to provide students with multiple paths to their goal.
2. Present options using student’s language, not institutional policy jargon.
3. Use advising committees to create more personalized and helpful messaging for students in transition.

**Manageable for Academic Units**
- Utilize online Change of Major Request Process and Salesforce for managing the transition between colleges.
- Establish best practices for change of major cases to ensure personalized support of student.
- Develop templates for change-of-major appointments to support advisors in the change of major process.
- Incorporate useful student data

**New Change of Major Request Process (April, 2019)**
A new online form through which students can request a change of major was deployed in April 2019 here: [https://changingmajors.asu.edu/](https://changingmajors.asu.edu/). The intent of the form was to collect all of the data advisors would need to appropriately evaluate a change of major request, and actually complete the change of major.

Who should use Change of Major Request tool:
● Undergraduate students requesting to change a single major

Who should not use the Change of Major Request tool:
● Enrolled undergraduate students requesting to add a concurrent major, minor or certificate
● Graduate students

Service Expectations for Using the Change of Major Request Process

Managing the SalesForce CRM Case:
● Submitted Change of Major Request forms are realized as SalesForce CRM cases sent to queues identified at the college level.
● Cases may be "owned" by a variety of resources depending on the college structure. Example frontline ownership may include:
  ○ Assistant Director
  ○ Front Desk Coordinator
  ○ Rotating advising staff

Expectations for advisor response:
● Service cases should be responded to within a 24-48 hour timeframe.
● Outreach could include:
  ○ Confirmation that the major has been changed, and a request that the student come in for an advising appointment in X time frame.
  ○ Communication that the student does not meet the eligibility requirements and
    ■ Request that the student make a future appointment to discuss how to meet requirements in the future.
    ■ Specific recommendations on how to become eligible in the future.
    ■ Recommendations regarding other similar and perhaps more suitable majors, if possible.
  ○ Communication that the student does meet the eligibility requirements, along with additional considerations for appropriate programs that may meet career and graduation goals.

(Actual Case) Examples of Quality Service responses:

Dear xxxx,

Hi, welcome to xxxx, we are so glad you are interested in our coursework. We changed your major per your request. To follow up with you, we would love to make an advising appointment with you to discuss your academic pursuits, and to pick out an appropriate schedule for the major. Please call our office during normal business hours of M-F 8-5 Phoenix, AZ time at xxxxxx, and we will set aside a time to either call or meet with you in person to discuss. We hope to meet you very soon.
And another great example:

Dear xxxxx,

Thank you for your request to change your major to xxxxx. Unfortunately, you are ineligible to change your major to xxxx due to the reason(s) below:

**Due to our repeat policy, all xxxx courses must be passed with a “C” or better, and can only be repeated 1 time. Since you have already failed xxxx twice, it is an indication that you will not be successful in this major. You should explore other majors for which you may be eligible by clicking the "Find Programs" tab on your MyASU.**

Sincerely,

Advisor name

● **Outreach should not** just be messaging that students should schedule an advising appointment. This is not an appropriate response.

(Actual Case) Examples of poor quality of service responses:

Dear xxxxx,

Thank you for contacting the xxxxx Advising office. We want to assist you schedule an appointment as soon as possible. Please call xxxxx to set up your advising appointment with your academic advisor. We look forward to speaking with you.

Sincerely,

xxxxx
Office Specialist

And another example:

Dear xxxx,

Thank you for contacting the xxxx advising office. To change your major, you must meet with an advisor in the xxxx. Please schedule an in-person or phone appointment by calling the academic advising office at xxxxxxx during business hours - Monday - Friday, 8:00 AM - 5:00 PM (Arizona Time).

If you have any further questions feel free to contact our office and we will assist you in any way we can.
Sincerely,

- Quick Text will be developed within Salesforce to allow advisors to provide thorough responses to the student, but not increase advisor workload. (Please have your school or college Quick Text managers contact Aaron Garriss at serviceexcellence@asu.edu. If you are unsure who is your quick text manager or need to elevate more folks to become quick text managers, please email your requests to serviceexcellence@asu.edu).

Requests for exploratory conversations:
- Advisors should continue to see students who want to have exploratory conversations about their interest in changing majors. The form does not need to be completed before these conversations can take place.
- The new tool provides students with a “next step” should they choose to formally request a change in major. This gives the student a clear path to starting the process.
- Quick text will be developed with in Salesforce to allow advisors to follow up with an email with this information (Aaron Garris to provide: see above).
- A Salesforce macro will also be developed to capture the Change of Major Request data should the student wish to initiate the change as a result of an exploratory conversation. Completing this macro will allow us to track data on students who are changing majors. The Change of Major Request form is not required to initiate a change of major.
- A special note about concurrent degrees: Students wishing to add or drop concurrent degrees cannot use the Change of Major Request form to make these changes. Normal processes should continue.

Online programs or students:
- The new request form does allow the following requests:
  - online students to change their majors from one online plan to another online plan
  - immersion students to change to an online plan.
  - online students to change to an immersion plan
- If a student wants to change from an immersion plan to online:
  - The academic advisor should review for eligibility and any academic concerns.
  - The case should then be transferred EdPlus at asuonline@asu.edu. The EdPlus team will work with the student to ensure that they understand financial implications.
  - The EdPlus team will make the major change at this point.
- If a student wants to change from an online plan to an immersion plan, the case can stay with the academic unit.
Advisor Communication: A multi-pronged communication plan is being developed to roll out the Change of Major Request process to advisors. Presentations will be made at all campus CAA events, the best practice document will be posted and there will be regularly published reports on student data regarding patterns of departure and arrival, and timelines for case response time etc. If you would like the Student Success Innovations Team to visit your individual advising office and consult on how to best leverage this new tool to maximize efficiency and enhance service to students who may want to change to YOUR major, please submit a request to serviceexcellence@asu.edu, attention, Aaron Garriss