

# **ADVISOR SET UP, TRAINING, DEVELOPMENT AND RESOURCE GUIDE**

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**Advising Administrators Board Sub-Committee:**

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## **New Advisor Setup Checklist for Administrators**

### **Before arrival**

- \_\_\_ Complete Human Resources new hire paperwork
- \_\_\_ Set up New Employee Orientation with Human Resources
- \_\_\_ Coordinate training with appropriate staff (college and unit level)
- \_\_\_ Create training calendar (identify who is resp. for each module)
- \_\_\_ Put together training materials
- \_\_\_ Make sure office has basic supplies/welcome decorations
- \_\_\_ Schedule campus tour(s)
- \_\_\_ Announce new hire to appropriate staff
- \_\_\_ Complete paperwork required for office keys

### **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**

- \_\_\_ Make sure employee completes online FERPA training
- \_\_\_ Request DARS access for audits and exceptions
- \_\_\_ Set up PeopleSoft and DARS training
- \_\_\_ Set up Fire Safety training
- \_\_\_ Request that employee be added to CAA distribution list
- \_\_\_ Order business cards
- \_\_\_ Order name plate (if needed) and name tag
- \_\_\_ Make sure employee has NACADA membership
- \_\_\_ Add employee to appropriate distribution lists
- \_\_\_ Add employee to advisor website
- \_\_\_ Request update to PS/MyASU advisor committees

# Training Outline

## Conceptual

### Vision/Mission Statements

- University vision/overview
  - ASU President's vision <http://president.asu.edu/library/asuvisionandgoals>
  - Retention & graduation mandates/rates
- College vision/overview

### Advising Overview

- Advising is teaching / a learning experience for students
  - Advisor responsibilities and attributes
  - Student responsibilities (in advising context)
  - Student learning outcomes
- Advising Model
  - At ASU -- Academic advising mission statement
  - 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

- Student Life <http://www.asu.edu/studentaffairs/studentlife/>
  - Code of Conduct
  - Rights and Responsibilities
  - What to do in cases of inappropriate student behavior
  - “Counseling” restrictions on advisors

## **Informational and Relational**

### **Systems**

- PeopleSoft
  - <https://hrsa.oasis.asu.edu>
    - Request access: <http://www.asu.edu/oasis/support/Access.html>
    - Training is on-line via Blackboard, or find a class at: <http://www.asu.edu/oasis/Version2/support/Training.html>
    - Advisor 101 and 201 training
  - Which students need to be **ADVISED** (cleared)
  - How to do it
  - Notes screen – make notes on all your student contacts and appointments
- eAdvisor (critical tracking)
  - Tutorial: <http://www.asu.edu/programs/majormaps/tutorial/>
  - Requirements/critical courses
  - On track/off-track guidelines
  - Tracking tools (in PeopleSoft and elsewhere)
  - eAdvisor/major maps: <http://www.asu.edu/programs/majormaps/>
- DARS (Degree Audit Reporting System)
  - Request access: <http://provost.asu.edu/dars/webaccess>
  - 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 <http://students.asu.edu/undergraduate-admission>
  - Requirements
  - Applying for admission
- College Admission
  - Initial admission requirements
  - Change of Major requirements

## **Readmissions**

- University 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/>
  - 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
  - Exploring majors <http://www.asu.edu/programs/>
- 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://www.asu.edu/go/classsearch/>

- Registration <http://students.asu.edu/node/33>
  - Drop/Add and withdrawal policies
  - Deadlines and timelines <http://www.asu.edu/registrar/general/semcal.html>
  - Fall & Spring – enrollment appointments
  - 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
    - Program & packet
      - English placement
      - Math in the first semester
        - Math placement test(s)
          - UPT
          - ALEKS
        - JAC 101 rules
      - Special course requirements for freshman (if you have any)
      - AP Credit rules
      - IB/ Dual Enrollment rules
      - CLEP tests and credit
    - “Cohorts” -- Academic Success Clusters (formerly known as Campus Match)
  - 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/>
  
- Junior/Senior check-in (replaces Declaration of Graduation/87 hours 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 <http://students.asu.edu/transfer-admission>
  - On-line transfer orientation: <http://www.vpsa.asu.edu/transferorientation/>
  - Relational: What these students need
  - Evaluating credits from other schools
    - First Year Composition
    - University General Studies
    - Religion classes from faith based colleges & universities
    - Quarter hours v. semester hours
    - Upper division
    - Requesting an evaluation from departments or another unit
    - In-state vs. out-of-state
    - Posting DARS exceptions (see DARS section of the training outline)
    - Timeline for exceptions
  - Course Equivalency Guide (CEG) - <http://az.transfer.org/cas/students/>
  - Arizona General Education Curriculum (AGEC)
  - College Source - <http://www.collegesource.org/>
  
- Study Abroad and Exchange
  - Overview of Center for Global Education Services <http://ipo.asu.edu/>
  - Differentiate Study Abroad and Exchange
  - Expectations, forms, and timelines
  
- Special Student Populations
  - International students <http://www.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://honors.asu.edu/>
  - What it is
  - How to tell who is in it
  - Basic requirements
- Culturally diverse students <http://www.asu.edu/provost/intergroup/>
- 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
  - Veteran forms and procedures
- First generation
- Adult Re-entry
- On-line learners <http://clas.asu.edu/online> and <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
  - Probation homework: <http://clas.asu.edu/students/advising/disqualification.htm>
- 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 from University College
    - 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
- Refreshers
- 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/>
  - National Academic Advisors Association (NACADA) - <http://www.nacada.ksu.edu/index.htm>
  - Awards
    - Unit advising award(s)
    - CAA Excellence in Academic Advising

## The Academic Advising Year

January	<p>Winter Session            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 &amp; after second week of class</p>
February	<p>Deadline to file a leave of absence            21<sup>st</sup> Day            Academic Status Reports            eAdvisor/Critical Tracking audit/major map verification            Outreach to continuing students, encouraging advising before enrollment appointments start            Summer &amp; Fall schedules come on-line            Students term-activated for summer &amp; fall            Summer registration starts            Orientation Training            eAdvisor Holds</p>
March	<p>Freshman Orientation Begins (continues through end of June)            Fall Enrollment Appointments Start            Spring Break            Academic Status Reports</p>
April	<p>Out of State Orientation Programs            Begin outreach to continuing students who have not yet registered for Fall term            Graduation Filing Deadline            Course Withdrawal Deadline</p>
May	<p>Out of State Orientation Programs            Complete withdrawal deadline            Last transaction deadline            Reading Day &amp; Final Exams            Commencement &amp; Convocations            Withdrawn from graduation reports            Disqualification/Probation Reports            Critical Tracking Reports            Review of DARS verification audits</p>

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 21 <sup>st</sup> 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

<b>Advisor's Tool Box</b>	
How do I find a major specific advisor at ASU?	<a href="http://universitycollege.asu.edu/advising/directory/index.html">http://universitycollege.asu.edu/advising/directory/index.html</a>
Where is the alphabetical list of Major Maps	<a href="https://webapp.asu.edu/eadvisor/MajorMaps.html?init=false&amp;nopassive=true">https://webapp.asu.edu/eadvisor/MajorMaps.html?init=false&amp;nopassive=true</a>
I would like to check out an advising training video?	<a href="http://caa.asu.edu/files/images/NACADA_inventory_log_0.pdf">http://caa.asu.edu/files/images/NACADA_inventory_log_0.pdf</a>
What is the link for the free electronic publication about academic advising?	<a href="http://www.psu.edu/dus/mentor/">http://www.psu.edu/dus/mentor/</a>
Where can I find campus wide advising resources?	<a href="http://caa.asu.edu/resources">http://caa.asu.edu/resources</a>
What's new with the Council of Academic Advisors?	<a href="http://caa.asu.edu/resources">http://caa.asu.edu/resources</a>
Where can I find out information about the National Academic Advisors Association? (NACADA)	<a href="http://www.nacada.ksu.edu/index.htm">http://www.nacada.ksu.edu/index.htm</a>
I need help using People Soft	<a href="http://www.asu.edu/oasis/support/JobAids.html">http://www.asu.edu/oasis/support/JobAids.html</a>
Where can I find DARS resources?	<a href="http://provost.asu.edu/dars">http://provost.asu.edu/dars</a>
Where is the link for the ASU Catalog?	<a href="http://catalog.asu.edu/">http://catalog.asu.edu/</a>

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

<b>Campus Resources and Referrals</b>	
Which office has information about student clubs and activities?	<a href="http://students.asu.edu/campus-life">http://students.asu.edu/campus-life</a>
Where can I find a directory of student support services?	<a href="http://www.asu.edu/students/">http://www.asu.edu/students/</a>
What is the link for Career Services?	<a href="http://students.asu.edu/career">http://students.asu.edu/career</a>