NSU ACADEMIC ADVISOR TRAINING CHECKLIST

GENERAL POLICIES AND PROCEDURES

- ❏ **Advising Model**
  - ❏ Reporting structure
  - ❏ Oversight Committees
    - ❏ Executive Advising Committee
    - ❏ University Academic Advising Committee
      - ❏ Assessment Sub-Committee
      - ❏ Professional Development Sub-Committee
      - ❏ Training Sub-Committee
  - ❏ Communication process
- ❏ **Advisor Roles and Responsibilities**
  - ❏ University Advising Center Advisor
  - ❏ College Advisor
  - ❏ Faculty Advisor
- ❏ **Advising process in UAC**
  - ❏ Initial Enrollment / SOAR
  - ❏ Continuing Enrollment
  - ❏ Concurrent / HS Student Enrollment
  - ❏ Transfer Advisement; students < 15 credit hours
  - ❏ University Strategies Assignments
- ❏ **Advising process in Colleges**
  - ❏ Initial Student Advisement / Transfer or Major Declaration
  - ❏ Continuing Enrollment
- ❏ **Advisement Timeline - First time enrollment to major declaration to graduation**
  - ❏ Communication with advisees
  - ❏ Advising touchpoints
    - ❏ Academic notice/probation
    - ❏ Mid-term grade reports
    - ❏ Enrollment
    - ❏ Other
- ❏ **Admission Term - Understanding Academic Year in numbers**
  - ❏ i.e. 201810=Summer 2017, 201820=Fall 2017, 201830=Spring 2018, 201910….etc.
- ❏ **Associate's Degrees that waive General Education Requirements**
  - ❏ OK Public 2-year
  - ❏ OK Private (limited)
  - ❏ Out of State Exceptions
- ❏ **Consortium Agreements (dual enrollment in two institutions)**
  - ❏ Credit Hour Limits
  - ❏ Advisor Responsibilities
  - ❏ Affect on Financial Aid
- ❏ **Deficiencies / Zero Level Course Placement**
  - ❏ English, Reading, Math
  - ❏ ACT Score Requirements

- ❏ Placement Testing Policies and Scores
- ❏ Timeframe for Completion
- ❏ Deficiency Agreement Form
- ❏ **Enrollment Calendar**
  - ❏ Add, Drop, Withdraw timeframes
  - ❏ Late Enrollment Procedures
- ❏ **Hold Procedures**
  - ❏ Holds affecting registration
  - ❏ Freshman advising hold requirements
  - ❏ Major Declaration hold procedures
  - ❏ Senior Checkpoint hold procedures
- ❏ **Intake Process for New Transfers**
  - ❏ Appointment Scheduling
  - ❏ Policies for phone or virtual appointments
  - ❏ Pre-Enrollment Orientation - online
  - ❏ Day of appointment process with transfer intake advisor
  - ❏ Day of appointment process with UAC or College Advisor
- ❏ **Major Declaration**
  - ❏ Student Eligibility for Major Declaration
  - ❏ Major Declaration Form
  - ❏ Hold placement and removal policies
- ❏ **Course Evaluation Procedure**
  - ❏ General Education Course Evaluation
  - ❏ Transfer Course Evaluation
  - ❏ Application of transfer 2000 level courses for 3000 level degree requirements
  - ❏ Process for evaluating UNKN courses
  - ❏ Requesting Equivalencies, Substitutions, or Exceptions (see Degree Works)
- ❏ **FERPA**
  - ❏ NSU Directory Information
  - ❏ Authorized Personnel & Offices
  - ❏ General Policies
  - ❏ Online Consent to Release Form
  - ❏ Verifying access
- ❏ **Special Student Populations**
  - ❏ International
    - ❏ Minimum hour requirement
    - ❏ Online course limitations
    - ❏ SACM Student Requirements
  - ❏ Student-Athletes
    - ❏ Zero-level course placement
    - ❏ Major declaration by 5th semester
    - ❏ Minimum hour requirement
    - ❏ General Eligibility requirements
    - ❏ Progress toward degree requirements
    - ❏ Practice and travel schedules
  - ❏ Veterans
    - ❏ Full time status rules
    - ❏ Eligibility requirements
- ❏ **Keeping notes / student records**
- ❏ **Academic Probation & Suspension**
  - ❏ Academic Notice
    - ❏ Semester GPA requirements

- ❏ Academic Probation
    - ❏ Semester GPA requirements
    - ❏ Overall GPA requirements
- ❏ Academic Suspension
    - ❏ Appeals process
    - ❏ Eligibility for return
- ❏ Process for notifying advisees of academic standing
- ❏ **Financial Aid**
    - ❏ General Financial Aid Policies
    - ❏ Understanding ROANYUD (Banner)
    - ❏ SAP Policies for general students
    - ❏ SAP Policies for degree programs with higher GPA requirements
    - ❏ Advisor assistance with Financial Aid Appeals
- ❏ **Academic Forgiveness / Reprieve / Renewal**
    - ❏ Academic Forgiveness limitations and policies
    - ❏ Evaluating student transcripts for reprieve / renewal
    - ❏ Timeframe for Forgiveness/Reprieve/Renewal application
- ❏ **Course Overrides**
    - ❏ Academic Advisor Override policies
    - ❏ Faculty Override policies
    - ❏ Department Override policies
- ❏ **Maximum Hour Policy**
    - ❏ Student eligibility for increasing max semester hours
    - ❏ Advisor review of transcript and recommendation procedures
    - ❏ Process for exceptions
- ❏ **Degree Requirements**
    - ❏ 60 hours 4-year school
    - ❏ 40 hours upper level
    - ❏ 30 NSU hours
    - ❏ Liberal Arts & Sciences (dependent on degree)
- ❏ **General Education Requirements**
    - ❏ UNIV 1003 based on classification
    - ❏ Prerequisites for particular majors
    - ❏ Math Pathways options
- ❏ **Testing Services**
    - ❏ AP, CLEP, IB Credit
    - ❏ MAT
    - ❏ English, Reading, Math Placement
    - ❏ Spanish Placement
    - ❏ Cost and timeframe for application to transcript
- ❏ **Prior Learning Credit**
    - ❏ CLEET Certification
    - ❏ Portfolio Submission
    - ❏ Cost and timeframe for application to transcript
- ❏ **Dual Major Policies, Second Degrees**
    - ❏ General Policies
    - ❏ Advisor review and approval
    - ❏ Shared coursework between dual majors
    - ❏ Guidelines for second degrees
- ❏ **Calculating GPA**
    - ❏ Semester GPA
    - ❏ NSU vs. Overall GPA

- ❏ Financial Aid GPA vs. Cumulative GPA
- ❏ Calculating GPA / Including Academic Forgiveness
- ❏ **Early Academic Alert (Mapworks)**
  - ❏ Referral Process
  - ❏ Timeframe for referral closeout
  - ❏ General policies
- ❏ **Graduation / Commencement**
  - ❏ Application deadlines
  - ❏ Senior Checkpoint Appointments
  - ❏ Final Degree Audit Review for all graduation requirements
  - ❏ Timeframe for degree conferral / diplomas mailed
  - ❏ Commencement procedures

COLLEGE RESOURCES

- ❏ **Degree Programs**
  - ❏ Majors & Concentrations
  - ❏ Majors which require minors
  - ❏ Programs which require application for admission
  - ❏ Special requirements - Major GPA, Internships/Practicums
- ❏ **Course Rotations**
  - ❏ Major course rotation
  - ❏ Sequencing for on-time degree completion
  - ❏ Exceptions
- ❏ **College Basic Info**
  - ❏ Dean
  - ❏ Associate Dean (direct supervisor)
  - ❏ Department Chairs
    - ❏ Course evaluations
    - ❏ Course overrides
  - ❏ Department Secretaries
    - ❏ Class schedules
    - ❏ Department overrides
  - ❏ College / Department Policies and Procedures

SOFTWARE

Degree Works

- ❏ **Basic Info**
  - ❏ Reading the Audit
    - ❏ Complete, In-progress, and Unmet Conditions
    - ❏ General Elective, Non-Credit, In-progress, and Not Counted coursework
    - ❏ Repeatable with limits
    - ❏ Repeatable without limits / non-credit
    - ❏ Repeats / duplicate courses
    - ❏ Split credits
    - ❏ Equivalencies, Substitutions, & Exceptions
- ❏ **Course Evaluation Procedures**

- ❏ XX Transfer Course Eval Audit
- ❏ GE Course Eval process
- ❏ Major Course Eval process
- ❏ Unarticulated coursework
- ❏ Legacy coursework
- ❏ **Senior Checks**
  - ❏ Z Reports for Senior Checks
  - ❏ Substitutions, Exceptions, Equivalencies
- ❏ **Other Features**
  - ❏ What-If Audits
  - ❏ Look Ahead
  - ❏ Registration Checklist
  - ❏ History
  - ❏ Notes
  - ❏ GPA Calculator
  - ❏ Refreshing & Processing New Audits

Banner (INB)

- ❏ Setting up MyBanner
- ❏ SPAIDEN – General Person Identification + FERPA
- ❏ SGASTDN – General student curricular information
- ❏ SFAREGS – Student Course Registration / Major/Minor Declaration (& holds affecting registration)
- ❏ SFAREGQ - Student Course Registration Audit
- ❏ SAAADMS – Admissions Application
- ❏ SOAHOLD – Hold information
- ❏ SFASRPO – Registration permits and overrides
- ❏ SOATEST – Test Score Information
- ❏ SGAADVR – Assigned Advisors
- ❏ SFASTCA – Student Course Registration Audit
- ❏ SFAWLPR – Waitlist Priority
- ❏ SHATERM – Course history by term / attempted/earned hours
- ❏ SHATATR – Transfer Course Articulation
- ❏ SHAGAPP – Graduation Application
- ❏ ROANYUD – Financial Aid / Satisfactory Academic Progress (SAP)

Banner (SSB/Self-Service/goNSU)

- ❏ Student Information Menu
- ❏ ID Selection
- ❏ Concise Student Schedule
- ❏ Registration History
- ❏ Academic Transcript
- ❏ Student Information
- ❏ Course Schedules
- ❏ Waitlist by course CRN
- ❏ Access to: Training materials (Argos, SSB, Degree Works)

Argos

- ❏ **Academic Advisor**
    - ❏ Faculty: Advisee List
- ❏ **NSU Student Quick View**
    - ❏ Person Info
    - ❏ Majors
    - ❏ GPA/Credits
    - ❏ Schedule
    - ❏ Course History
    - ❏ Advisors
    - ❏ Tests
    - ❏ Holds
    - ❏ Grades
- ❏ **Student Academic Information**
    - ❏ All Advisors Assigned
    - ❏ Major Field of Study by Term
    - ❏ Pre-Professional Health (CSHP only)
- ❏ **Transfer Course Info**
    - ❏ Dashboard

Banner Document Manager

- ❏ Original Transcripts (computer prof, in-progress courses)
- ❏ Academic Forgiveness
- ❏ OW Forms

YouCanBook.me

- ❏ Initial Setup
- ❏ Calendar Management
- ❏ Process for profile change requests

Mapworks (Academic Early Alert & Advisor Contact Log)

- ❏ Academic Referrals
    - ❏ Assignments / Processing
    - ❏ Entering Referrals
    - ❏ Outreach Policies
    - ❏ Closing Referrals

- ❏ Advisor Contacts
    - ❏ FERPA
    - ❏ Logging contacts, notes
    - ❏ Running advisee reports
    - ❏ Static lists

- ❏ Mapworks Surveys
- ❏ Talking Points
- ❏ Assessing Risk

Schedule Planner

- ❏ Adding Courses
- ❏ Scheduling Breaks
- ❏ Selecting specific courses
- ❏ Adding to Cart
- ❏ Schedule favorites
- ❏ Enrolling in some or all saved courses

M:// ADVISING SHARED DRIVE

- ❏ **Enrollment Services / Advising**
  - ❏ Advisee cleanup lists
  - ❏ Mid-term grade reports
  - ❏ Senior Checkpoint hold reports
  - ❏ Master Advising List
  - ❏ Advising policies, procedures, tools

CAMPUS RESOURCES AND CONTACTS

- ❏ Career Services
- ❏ HawkReach
- ❏ Disability Services
- ❏ Veterans
- ❏ Registrar
- ❏ International
- ❏ Athletics
- ❏ Housing
- ❏ Student Affairs
- ❏ Student Rights & Responsibilities
- ❏ Tutoring