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