

Academic Advisor – Advising Training/Onboarding

Checklist for onboarding and training a brand-new Academic Advisor

	Steps	Process	Completed By
☐	Requesting Access	The Advising Lead will request access and/or coordinate the following: • Internal College shadowing • College-specific training • Banner Student Access. The request should mirror the access of another advisor in their area. • Request a change to an existing phone line	Advising Lead
☐	Requesting Access & Additional Requests	The Associate Director of Advisement Training, Jennie Scott, will request access and/or coordinate the following: • Email distribution list for Advising Weekly Email • Academic Advisement Council Meeting invitations • Degree Works Questions Team • Learning Support Permit file • Email distribution list for Graduation Lists • VZ (Orientation) lists • New Undergraduate Professional Academic Advisor Training D2L ADMN course • Banner Document Manager • Modifying Degree Works Plans after meeting with Cynthia Edwards, Assistant Registrar – Graduation Office, during Advisor Trainings • NACADA Memberships will be purchased for new advisors in September and February. Jennie Scott will reach out with additional information and a link to the Member Application Form. • Jennie Scott will invite all new Advisors to a New Advisor lunch in either December or May, depending on start date. • Jennie Scott will coordinate cross-college Advisor shadowing.	OEDAA Associate Director of Advisement Training
☐	Introduction to Community	The new Advisor will complete the following: • Email Ethan Hutchinson (hutchinsoneg@etsu.edu) to provide a write-up announcement for the Advising Weekly email • Staff email accounts are automatically created when the signed contract has been processed by Human Resources. Activate account or change password here.	Advisor
☐	Schedule Navigate360 Training	Email Rachel Swatzell (swatzellr@etsu.edu) to set up Navigate360 Onboarding/Training. Rachel will coordinate with Jennie to align with Academic Advisor training days.	Advising Lead / OEDAA

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☐	Training (Introduction)	The training introduction will include the following topics (3 hours): • <i>Introductions/background</i> • <i>Intro to Advising</i> • <i>University advising mission, vision, and advising structure</i> • <i>Best practice and common Advising topics</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 2)	The training session will include the following topics (3 hours): • <i>NACADA Core Competencies and Values</i> • <i>Shadowing observations/questions</i> • <i>Catalog policies</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 3)	The training session will include the following topics (3 hours): • <i>University degree and graduation requirements</i> • <i>General Education/Compass Core</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 4)	The training session will include the following topics (3 hours): • <i>Degree Works</i> • <i>Exception processes</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 5)	The training session will include the following topic (3 hours): • <i>Continue with Degree Works as needed</i> • <i>Learning Support program, policies, procedures</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 6)	The training session will include the following topic (3 hours): • <i>Meet with Ethan Hutchinson – Executive Director of Academic Advisement</i> • <i>Shadowing observations/questions</i> • <i>Office of the Registrar procedures/responsibilities</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 7)	The training session will include the following topic (3 hours): • <i>Schedule Builder</i> • <i>Additional registration procedures</i> • <i>Confirming Registration</i> • <i>Academic Retention</i>	OEDAA Associate Director of Advisement Training

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☐	Training (Session 6)	The training session will include the following topic (3 hours): • <i>Goldlink: course schedules, transcripts, GPA definitions, Advising Summary, Advisor Grade Tool</i> • <i>Academic Fresh Start</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 7)	The training session will include the following topic (3 hours): • <i>Meet with Cynthia Edwards, Assistant Registrar – Graduation Office and Jennifer Seal, Assistant Registrar – Records Office</i> • <i>Shadowing observations/questions</i> • <i>Advisor semester timeline/cycles</i> • <i>Academic Calendar</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 8)	The training session will include the following topic (3 hours): • <i>Hands-on training: Banner codes/screens, Schedule Builder, build Degree Works plans</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 9)	The training session will include the following topic (3 hours): • <i>Orientation processes/procedures/best practice</i> • <i>Admissions</i> • <i>Advisor-specific recommendations for best practice in Advising notes</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 10)	The training session will include the following topic (3 hours): • <i>Financial Aid policies and procedures</i> • <i>Campus Resources</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 11)	The training session will include the following topic (3 hours): • <i>Hands-on training: building Degree Works templates</i> • <i>Shadowing observations/questions</i>	OEDAA Associate Director of Advisement Training
☐	Training (Session 12)	The training session will include the following topic (3 hours): • <i>Managing difficult conversations and responses to students in distress</i> • <i>Parents</i> • <i>FERPA/privacy</i> • <i>Advisor well-being/self-care</i>	OEDAA Associate Director of Advisement Training

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☐	Training (Session 13)	The training session will include the following topic (3 hours): • <i>Shadowing debrief and additional questions</i> • <i>Case studies</i> • <i>How to prep for an appointment</i> • <i>Advisor professional development (brief overview of Career Ladder and Microgrants) and opportunities for involvement</i> • <i>Complete D2L Knowledge Check and review additional items as needed</i>	OEDAA Associate Director of Advisement Training
☐	Post- Completion Follow-up	The Associate Director of Advisement Training, Jennie Scott, will schedule the following: • <i>1-month and 3-month post-training meetings to discuss additional questions and begin reflecting on future professional and advising community goals</i> • <i>6-month, 9-month, and 12-month post-training meetings to discuss additional questions, continue reflecting on future professional and advising community goals, begin discussing and developing an Advising Philosophy, and discuss the Academic Advisor Career Ladder</i>	OEDAA Associate Director of Advisement Training