**Supervisor Checklist for New Academic Advisor**

Advisor Name: myWSU ID:

Start Date:

Supervisor Name: myWSU ID:

Department:

 **To be requested in first week**

|  |  |  |
| --- | --- | --- |
| Permissions/Access\*indicates training is provided by supervisor | Request from  | Date Completed or NA |
| AFD administration\* (if applicable) | stusecurityaccess@wichita.edu RO Instructional doc |  |
| Banner Advisor Access | stusecurityaccess@wichita.edu  |  |
| Degree Works audits, exceptions, SEP\* | stusecurityaccess@wichita.edu |  |
| Perceptive Content\*(formerly Webnow) | stusecurityaccess@wichita.edu |  |
| Academic plans template management\* (if applicable) | stusecurityaccess@wichita.edu RO Instructional doc |  |
| Staff major change\* (if applicable) | stusecurityaccess@wichita.edu RO Instructional doc |  |
| WSU Reporting\* | stusecurityaccess@wichita.edu |  |
| OneStop Service Desk | [aaron.hamilton@wichita.edu](file:///%5C%5Cad.wichita.edu%5Cvpaa%5Cavpaa_share%5CAdvising%5CAdvising%20Supervisor%20Checklist%5Caaron.hamilton%40wichita.edu) |  |
| ID & Password setup | myWSU Portal |  |
| Online FERPA Training | myWSU Portal |  |
| Attends Orientation | Human Resources |  |
| Online IT Security Awareness | myWSU Portal |  |
| Navigate 360 Student (formerly SSC Campus) | <https://wichitastate.co1.qualtrics.com/jfe/form/SV_2cckEt9iYag0gXc> |  |
| Banner training | Corby Reddington will schedule after Banner access created |  |

**Supervisor is responsible for ensuring the advisor is trained on why, when and how to access: In first two weeks**

|  |  |  |
| --- | --- | --- |
| Gen Ed/College/Degree specific requirements |  |  |
| Mandatory minimum two weeks shadowing |  |  |
| Navigate 360 Student | Office-designated Student Success Specialist Team Member  |  |
| OneStop | <http://wichita.edu/onestop> |  |
| Registrar’s Office | <http://wichita.edu/registrar> |  |
| Resource Directory  | <http://wichita.edu/resources> |  |
| Student Concern Resolution Guide | myWSU Portal |  |
| Transfer Equivalency lookup | <http://webapps.wichita.edu/TransferEquiv>  |  |
| WSU Catalogs (UG and GR) | <https://wichita.edu/catalog>  |  |
| WSU Reporting- appropriate folders | myWSU Portal |  |

**Supervisor is responsible for ensuring the advisor is trained on the following items impacting students: In first month**

|  |  |
| --- | --- |
| Admissions processes (UG and International) |  |
| Financial Aid basics |  |
| Forms (Academic, Athletic, Exceptions, Financial Aid, International, Military & Veterans, Graduation (Academic Forgiveness, AFD, CPT, Exceptions, I20, NCAA, OPT, reduced courseload, study abroad, SAP, Senior, Senior Rule, VA ECR, 104R, etc.)  |  |
| Registration and waitlisting, drop/add, financial responsibility for enrolled courses |  |
| Student Early Alert System (SEAS) |  |

**Supervisor confirms that advisor knows how and when to: In first month**

|  |  |
| --- | --- |
| Access Perceptive Content |  |
| AFD administration (if applicable) |  |
| Access appropriate Banner screens: |  |
|  Assign student Academic Advisor (SGAADVR) |  |
|  Check admission status (SAAADMS) |  |
|  Check prior college information (SOAPCOL) |  |
|  Check registration audit (SFASTCA) |  |
|  Check degree and SAP status (SWIGSTU) |  |
|  Check test scores (SOATEST) |  |
|  Clear holds (SOAHOLD) |  |
|  General Student Information (SGASTDN) |  |
|  Give registration permit override (SFASRPO) |  |
|  Perform registration query (SFAREGQ) |  |
|  Print unofficial transcripts (SHARQTC) |  |
|  Provide a PIN (SPAAPIN) |  |
|  Search for student by name or ID (SOAIDEN) |  |
|  Transfer course articulation (SHATATR) |  |
|  View FERPA release and/or Proxy access is on file for student (SPACMNT) |  |
| Answer OneStop tickets |  |
| Process Staff Major Change request (if applicable) (<https://webapps.wichita.edu/MajorChangeStaff/default.aspx>) |  |
| Read/interpret Degree Works audit |  |
| Reactivations/returning student process |  |
| Record notes (SPACMNT and Navigate 360 Student) |  |
| Request transfer evaluation (transfer.eval@wichita.edu) |  |
| Request/enter Exceptions to DW Audit |  |
| SEP Template Management (if applicable) |  |
| View student information via Advising Student Profile (contact, major, enrollment, test scores, prior schools) |  |

**Supervisor confirms that advisor has signed-up/completed the following through WSU’s myTraining: in 90 days**

|  |  |
| --- | --- |
| Accessibility Training for Faculty & Staff, if/when available through myTraining |  |
| Campus Safety and Social Responsibility Training, if/when through myTraining |  |
| Campus Safety: Active Threat Incident, if/when available through myTraining |  |
| CARE Team Training, if/when available through myTraining |  |
| Diversity Trainings, if/when available through ODI |  |
| Title IX training available online through myTraining |  |
| #WeSupport U: Preventing Suicide Training, if/when available through myTraining |  |
| Additional applicable trainings, if when/available (such as Virtual Meetings in Teams, Microsoft programs, etc.), if/when available through myTraining |  |

**Supervisor will provide the following training specific to their college/department: in 90 days**

|  |  |
| --- | --- |
| Application process and deadlines to specific programs |  |
| Communications with students (email guidelines, campaigns) |  |
| Making referrals to other resources |  |
| Schedule shadowing/cross-training with another college within first 6 months |  |
| Scholarships |  |
| Senior forms/graduation check |  |
| Types of appointments (campus visits, transfer students, graduation checks, etc.) |  |
| Use of Navigate 360 Student (appointment scheduling, campaigns) |  |

**Supervisor will ensure that the following Transition Advising tools/skills have been trained: in 90 days**

|  |  |
| --- | --- |
| **Technical Skills** |  |
|  What If Audits & Degree Maps |  |
|  Referral process to other advising centers |  |
|  Referral process to Shocker Career Accelerator |  |
|  Process to return to university, if leaving for non-WSU program |  |
| **Soft Skills** |  |
|  Add/drop discussion |  |
|  Advising strategies for the session |  |
|  Terminal degree or applying to Graduate school? |  |

Completed document must be sent, by advising lead, to AVP SSP in WSU Provost Office 90 days from start date. This document should be used for onboarding and may also be used in the employee evaluation process.

Supervisor Signature: Date Submitted to AVP SSP:

Date Received by AVP SSP/staff initials: