Faculty Advisor Checklist

Scheduling the Appointment	✓
REMEMBER: Each department is different! Work with your Administrative Assistant on how your department sets student appointments.	
Review Holds on Data-tel – *be sure those are cleared before scheduling your appointment*	
Ensure you have student's information: ✓ Verify Name, Student ID & Major ✓ Discuss modality (on-line, phone, etc.) & timeframe to fit both their & your needs ✓ Consider your student (discuss personal obligations & other barriers for a productive advising session) ✓ Prepare them for remote advising – it's different than in-person!	
Send an Appointment Confirmation and request the student confirm ✓ Ensure student "brings" their Academic Evaluation (or provide instructions for them to retrieve it) ✓ Send core curriculum course options (if needed as part of advising discussions)	
Before Advising Session	
Review previous student information: ✓ Data-tel (PERC Screen, RG Hold) & Civitas Inspire for Advisors for previous advisor comments ✓ Data-tel (STAC Screen) for previous semester information ✓ E-trieve for transfer credits (if applicable)	
Ensure VPN is working for remote advising	
During Advising Session	
Virtual Advising: Confirm student (review Do's & Don'ts on what you're allowed to ask)	
Explain role as the Advisor: Be a POINT PERSON to help students complete their goals! • Accountability Partner • Degree Planning • Student Resources	
Get to know the student: "Holistic Approach" ✓ What would you like to accomplish today? ✓ What impact do you want to make on the world (i.e. Career)? ✓ What's your motivation? ✓ Personal Obligations: Work? Support System? ✓ Review Previous Institution transfer credits (if any) & prior semester coursework ✓ (FA20) Virtual Learning (are you comfortable with online classes, do you have access to technology, are you a dual credit student with technology issues?)	
Discuss & provide the student the Advising Checklist	
Discuss the effects of changing their major & the importance of completing courses on their degree plan as it relates to Financial Aid, Graduation, etc. *Financial Aid will only pay for courses that are on the student's Academic Evaluation*	
Remove RG Advising Hold using previous days date (use the most recent RG hold)	
Under RG Advising Hold in comment section, add a timestamp (*If special circumstance or additional comments need to be made regarding advising session, please add them to comment section with the timestamp included*) NOTE: No longer using CMNTA comment	
After Advising Session	
Add entry in Inspire for Advisors (IFA)* - *A copy + paste from the RG Hold is recommended.* **IFA entries can only be used for current students, incoming or returning (those who have been out for over a year) will not be found in Civitas until the start of their new term.*	
Send student follow-up notes, Tuition Payment deadlines, etc.	
Have student complete survey if your department conducts their own	