

## Advising Session Guide

This document is designed to guide advisors in planning and creating advising sessions that provide students with opportunities for course selection, academic development, and responsibility for degree planning.

### Elements of the Advising Session

1. Develop or further advising relationship
2. Discuss major & career path(s)
3. Confirm on Banner and/or UMdegree:
  - major(s), minor(s), concentration(s), and catalog
  - check for active registration status
  - no holds
  - pre-requisites, test scores
  - UMdegree Worksheet
4. Check Navigate for any early alerts submitted
5. Review requirements and plan courses to take
6. Ask about transfer courses planned & complete TCR if necessary
7. Remind of graduation items as needed:
  - apply to graduate
  - Summary of Coursework Remaining
8. Make referrals and offer engagement opportunities
9. Assign tasks to be completed before next appointment
10. Enter/ask for permits
11. Petitions: General Education courses - enter petitions in UMdegree for substitutions/exceptions. Send course syllabus/description to Mary Jones. Major substitutions/exceptions: Email [CAS Graduation](#) if department approves major and college requirement substitutions/exceptions.
12. Clear student to register on SPAAPIN
13. Assign advisor on SGAADVR

## **Preparation for an Advising Session - Quick Guide**

1. Check SOAHOLD (If it is financial refer to University & Student Business Services. If it is a hold by student accountability, refer to Darren Wibberding.)
2. Use UMDegree as primary source – check courses registered, consider prereqs. look over GPA.
3. Check EAB Navigate for alerts and to see if they are on track with the plan you entered in the planning tool. If a student was alerted as not showing up to class, be prepared to find out why. If they are marked as not able to pass, talk to the student as to what's happening, and help them consider options.

### **Helpful Admin Pages:**

SOAHOLD – registration holds

SOATEST – test scores

SGASTDN – general student profile (including program info.)

SPAAPIN – clearing pins

SGAADVR – assigning advisors

SFASRPO – registration permits

### **Procedures Handles in Scates 107**

- Adding/changing majors, minors, concentrations, and catalog years (if student's major is in our college)
- Reviewing and signing Financial Aid graduation plans (must be filled out before submission to our office)
- Late/Retroactive withdrawals (only for 2 semesters, prior semesters go to Registrar's Office)
- Overload requests-for student with 3.0 overall GPA or 3.0 for last 3 semesters
- Turning in major/minor approval forms for second majors or minors in other colleges with course exceptions
- CPOS review for Financial Aid
- Degree certification

## Completing a Full File Review

1. Look up the student's major(s), minor(s), concentration(s) in Banner Admin Pages (SGASTDN form). If they are not correct, clarify with the student during the appointment and then email [CAS Graduation](#) with changes needed (copy the student on the email).
  - At the same site check the catalog if it might be an issue. When using UMdegree, having the correct catalog will be essential.
  - Also in SGASTDN check to see if the student's STATUS is Active. If it is not, they must apply for readmission.
2. Check Banner Admin Pages (SOAHOLD) for any holds the student may have and inform them of the hold when you meet.
3. Check Navigate to see if the student received Early Alerts for any courses.
4. The first time a student needs to take a course with a math pre-requisite, such as math or a science, use Banner Admin Pages (SOATEST) for ACT scores.
5. Update your degree sheet for the student so that you can see what courses might be taken the next semester: [Advising Degree Sheets](#)
  - Use the Self-Service Transcript.
  - Use UMdegree to see what courses/requirements remain or to enter petitions for general education courses if needed: [UMdegree Training for Advisors](#). \*include syllabus & course description
  - Send an email to [casgraduation@memphis.edu](mailto:casgraduation@memphis.edu) if you are allowing any substitutions in the major; include the courses involved, student name, and U number.
  - Check UMdegree for accuracy. If there are discrepancies, e-mail [casgraduation@memphis.edu](mailto:casgraduation@memphis.edu) with the issues, student name and U number.
  - Remind students of items on the Degree Completion Checklist regarding residency, 2-hour PHED limit, 42 UD hours, C- or higher in major/minor, UM and overall GPA of 2.0 or higher
  - Make notes in Navigate and/or UMdegree
6. For students with 80 hours or more completed, consider what the student's likely graduation date may be. Students in the CAS should apply to graduate at the beginning of the semester a calendar year before they expect to graduate. (for example, January 2021 for graduation in May 2022). Students apply in the Commencement section of the My Degree page in myMemphis.
7. If you have received a Summary of Coursework Remaining for a student, go over the remaining requirements together and remind the student to e-mail [CAS Graduation](#) if the expected graduation semester needs to be changed.
8. Pre-professional and Career Services recommendations.

## Advising Session Checklist

Take time to get to know the student- ask about the student's interests, high school, hometown, favorite or best classes, academic strengths, career goals, etc. Establish a connection with the student and review any tools they may not be familiar with. If you've previously met with the student, take a few minutes to greet the student and to make sure nothing has changed with major/career intentions.

1. Ask how current classes are going (and discuss any Early Interventions/Alerts received).
2. Review [General Education Requirements](#).
3. Ask the student about high school world language and advise using the guidelines under "Other Considerations."
4. Discuss with the student any of the following:
  - program changes needed (major, minor, concentration, catalog)
  - readmission
  - holds
  - pre-requisites, co-requisites (including ACT scores & WDLG placement exam)
  - transfer course procedures for courses taken elsewhere – complete TCR form if necessary
  - application to graduate
  - summary of remaining courses
5. If the student has planned for the session, look over the choices of classes for the next semester, or help them create a list of classes, using Navigate Academic Planning Tool. Take into consideration how many hours the student should take and how many hours the student plans to work.
6. Discuss with the student next steps: such as career exploration, transfer matters, internship/study abroad/research opportunities, schedule preparation, what to bring next time.
7. Issue permits for any courses in your major that require a permit or if needed to override a prerequisite if you decide to do so. (ONLY do this for courses you can issue permits for!) OR call/email the appropriate person in your department office or in another department to request the permits so that they will be available when the student registers.  
<https://www.memphis.edu/registrar/register/permits.php>
8. Use the SPAAPIN form (in the Advising Forms channel in myMemphis or in ADMIN PAGES) to clear the student to register.
9. Assign yourself as advisor for the student on SGAADVR – or ask the person responsible for this in your department to do so.

## Other Considerations:

- Refer students to appropriate offices for follow-up such as ESP/Tutoring, Career Services Specialists, Pre-Professional Advising for pre-health and pre-law students: [Referrals list](#)
- Utilize catalog to find course [Prerequisites/Corequisites](#) that are in place in Banner. Please be sure that a student has the appropriate prerequisite before recommending a course. Also note the co-requisites for a course and include these in the list of courses the student should register for.
- The Media Center (Jones 220) is where students go to take the world language placement test. Remember the following guidelines about world languages:
  - a. Students choosing the same language taken in high school must take the placement test to determine which level to register for (unless they know they need 1010 because the language was taken long ago); they should NOT be told to register for 1010 and to take the test later.
  - b. Students choosing to begin with a new language would, of course, need to register for a 1010 section of the language. (Students should be advised not to put off world language for too long because it sometimes becomes a stumbling block for graduation.)
  - c. Once students begin taking a world language, it is best to take it each semester rather than skipping a semester and forgetting what they have learned.
  - d. See the website for any additional questions regarding [placement tests](#).
- Students should leave your office with plan filled out in Navigate and with a list of course prefixes and numbers so that they know what courses to register for. Also, provide a couple of alternate courses.
- If time permits and registration for the term has begun, allow the student to register in your office so that any problems can be resolved.
- Adding notes in UMdegree or Navigate is incredibly helpful to other campus partners that may also work with your student.
- Withdrawals- A withdrawal should always be strategic. A withdrawal counts against students in terms of attempts with financial aid but does not harm a student's GPA. It also does not count as an attempt in terms of the universities retake and forgiveness policy. The student will likely have to retake the course, so it's good to talk about what happened, and what they will do in the next term. Be very mindful of the final withdrawal date and talk to the student about if they believe they can bring their grade up in the class. **ALWAYS ADVISE THE STUDENT TO SPEAK TO FINANCIAL AID BEFORE CONSIDERING A WITHDRAWAL.**