## NEW GRADUATE ADVISOR CHECKLIST

Dear Graduate Advisor,

You play a unique role as the graduate community is more directed and independent at this stage in their academic career. You are present to guide graduate students administratively, intellectually and professionally by ensuring adherence to policies set forth by the Department/College, Graduate School, and University. Some of the responsibilities of Graduate Advisors include, but are not limited to: recruiting, admissions, implementing tuition benefit and student health insurance, administering and/or coordinating PhD Qualifying Exams and MS Comprehensive/Final Exams, Proposal Defenses, Thesis/Dissertation Defenses, student record keeping (electronic and paper), facilitating the OPT/CPT process, registering international students for the ITA Workshop, graduation, career advising and much more. The following summarizes general guidelines as you begin your career.

All the best,

*G.A.P.A. Leadership Committee*

*Melissa Hall, MPA, PhD*, Program Manager, Master of Public Administration
*Gerri Mackey, MBA, MA*, Graduate Academic Advisor, English
*Terri Elder-Hale*, Academic Advisor/Administrative Assistant, Medicinal Chemistry
*Jami Saffioti, PhD*, Graduate Academic Advisor, Mechanical Engineering

# NEW EMPLOYEE ACTIONS

## Administrative Items
- Obtain University of Utah ID (uNID)
  - Login to Campus Information Service (CIS)
  - Activate email account (UMail)
    - Request to be added to appropriate e-mail lists
      - gapa@lists.utah.edu, Melissa Hall – melissa.hall@mpa.utah.edu
      - gradadvisors@lists.utah.edu, Darci Berg – darci.berg@gradschool.utah.edu
      - aynews@lists.utah.edu, Julie Hottes - jhottes@sa.utah.edu
- Call [Centrex/Avaya/Coral] to get voice mail password and to synchronize voicemail with UMail
- Request for Information Security Authorization
  - Advising Technology Training
    - Leslie Park – Coordinator for Advisor Development and Collaboration
      - lpark@uc.utah.edu, 801.581.8146
  - Advising Basics
  - New Employee Security Guidance
    - Complete the FERPA Review
  - PeopleSoft for Advisors
    - Clint Hayward – Computer Assistant, Registrar's Office
      - chayward@sa.utah.edu, 801-581-8393
- Fill out Academic Department Admissions Contact List Update Form

## Get Acquainted
- Familiarize self with department
  - Review webpage to get acquainted with staff, faculty, and program
  - Review department handbook (if applicable)
- Familiarize self with Graduate School
  - Review webpage to get acquainted with staff
  - Review Graduate Catalog
  - Schedule meetings with important contacts at the Graduate School
    - Darci Berg – Administrative Program Coordinator, Graduate Records
      - darci.berg@gradschool.utah.edu, 801.585.9873
    - Jolyn Schleiffarth – Coordinator of Fellowships and Benefits
      - jolyn.schleiffarth@gradschool.utah.edu, 801.581.6020
    - Diane Cotsonas – International Teaching Assistant Program (ITAP) Coordinator
      - diane.cotsonas@utah.edu, 801.585.6659
    - Kelly Harward – Thesis Editor
      - kelly.harward@gradschool.utah.edu, 801.581.7642
- Familiarize self with other important departments on campus
  - Admissions
    - admissions@utah.edu, 801.8761
  - Income Accounting
    - income@utah.edu, 801.581.3968
  - International Student and Scholar Services (ISSS)
    - international@utah.edu, 801.581.8876

# RECRUITMENT

### Graduate Career Fairs
- Research graduate fairs of interest
  - Utah Graduate School Fairs
- Communicate with other graduate advisors in your college to potentially coordinate widespread appearance

### Graduate Visitation Weekend (if applicable)
- Work with Graduate Director/Graduate Committee/Faculty to review and select top tier students to invite to visit your department
  - Communicate with faculty regarding projected number of available assistantship offers
  - Communicate with prospective students regarding visit
    - Review past agendas to schedule tours, meetings with professors, events around SLC, etc.
- Work with the office personnel for assistance with lodging, meals, travel/transportation, reimbursements, etc.

# ADMISSIONS

### Apply Yourself
- Online training
- Attend ApplyYourself (AY) New User Training
  - Julie Hottes – Database Analyst
  - ayhelp@sa.utah.edu, 801.581.6269
- It is recommended that you generate a mock application (if one doesn't already exist) to better understand the application process from the applicant point of view
- Acquaint yourself with important AY features
  - Queries
  - Email Templates
  - Export Templates
  - Generate PDF's
  - Department Recommendations
- Coordinate with Graduate Director regarding admissions decisions procedures
  - You may be expected to provide applicant data to Graduate Committee and process department recommendations in AY following review

### Office of Admissions
- Review deadlines and requirements for your department for domestic and international applicants
- Review Graduate Admissions Training Seminar handbook (if accessible)
- Contact Office of Admissions for additional questions
  - admissions@utah.edu, 801.581.8761

### Funding Offers
- Domestic Funding Offers
  - Acquaint yourself with college specific tuition, fees, differential tuition
  - Review previous offer letters to provide templates with specific verbiage for different assistantships (teaching, research, graduate), stipend amounts, tuition benefit, etc.
- International Funding Offers
  - Contact International Admissions for overview on details in international offer letters
  - Review International Teaching Assistantship (ITA) Clearance Procedures/Requirements

# STUDENT ADVISING

## New Students
- These are just a few topic suggestions if you will be hosting or assisting with an orientation for new students in your department
  - UCard, parking passes
  - Advise students how to get added to department graduate mailing list
  - Assistantships, tuition benefit, health insurance
  - Registering for courses
  - Familiarization with buildings, staff, faculty, degree offerings, research areas
  - Department graduate handbook (if applicable)
  - Graduate Catalog
  - Graduate School, Current Students

## Financials
- Tuition Benefit Program
  - Follow all Tuition Benefit Program Guidelines
  - Follow the TBP Minimum Support Amounts and Deadline Calendar
  - Tuition Benefit Enrollment Form
  - Track TBP participants
    - In *Student Financials* block under *Employee* tab in CIS
    - Use *Graduate Tuition Benefit* to enter information
    - Use *Graduate Tuition Benefit Report* to run report and get signature sheet
- Teaching/Research Assistantships
  - Acquaint yourself with the procedures by which students apply for teaching/research assistantships
- Financial Aid & Scholarships
  - The Scholarships Office helps coordinate fellowships and scholarships for graduate students
    - Carol Bergstrom – Associate Director
      - cbergstrom@sa.utah.edu

## Academics
- Degree Offerings
  - Know the current degree offerings in your program (M.S., Ph.D., etc) and review the requirements for each
- Get acquainted with student filing system in your office and necessary forms
- Coursework
  - Class Catalog & Schedules
  - Class Numbers and Permission Codes
    - You may have to coordinate the retrieval of permission codes for your faculty
    - You may either provide the numbers to professors or be asked to give codes to students who request them
    - CIS → Peoplesoft → Records and Enrollment → Term Processing → Class Permissions
- Graduate Student Degree Tracking
  - Located in the *Graduation Information* block under the *Employee* tab in CIS
  - Here you can view students' progress in the program and submission of important forms
    - Supervisory Committee
      - Be sure to note the regular faculty in a committee as there are guidelines which must be met for those participating
    - Program of Study
      - Be sure to familiarize yourself with the Program of Study requirements for each degree offered in your department

- - - Exams
        - Be sure to check the correct degree type (Thesis, Project/Nonthesis/Coursework Only) such that appropriate requirements are fulfilled (master's comprehensive exam, doctoral qualifying exam, thesis/dissertation proposal defense, project/nonthesis final exam, thesis/dissertation defense)
- Graduation
  - Run a Graduate Departmental Audit Report (GDAR) for each degree offering
    - In *Graduation Information* block under *Employee* tab in CIS
    - Check that specific units (A1-A10) are marked 'Complete' at specific times in the semester (Darci will send regular update emails for you to check the progress of graduating students)
      - A1 – Graduate School Approval
      - A2 – Graduation Application
      - A3 – Thesis Hours
      - A4 – Total Hours
      - A5 – Residency
      - A6 – Program of Study Approvals
      - A7 – Exam Approvals
      - A8 – Language Verification
      - A9 – Thesis Release
      - A10 – Class Grades
      - A11 – Supervisory Committee Approval
  - Communicate with college to update graduating student information
    - Send out an e-mail asking for students that are graduating/walking in the convocation ceremony to give you their full name and an honors that they received at the UofU
- Career Services
  - Find a Career Coach for your student body
    - OPT/CPT (Optional Practical Training – After Graduation/Curricular Practical Training – concurrent with course work) are programs where you will work ISSS

# Administrative
- Class Roles
  - Located in the *Academics* block under the *Employee* tab in CIS
    - Here you can view the students enrolled in a particular course during a current or past term
- Enter Grades
  - Located in the *Grading* block under the *Employee* tab in CIS
    - Here you can enter/view grades for students enrolled in a particular course during a current or past term
- Meetings
  - Graduate Committee Meetings (if applicable)
    - You may be responsible for making the meeting agenda, taking notes during the meeting, and creating the minutes after the meeting
  - Director of Graduate Studies (DoGS) Meetings
    - These are typically held on Thursdays at the end of each month (morning and afternoon sessions are provided)
    - You may be asked to attend these meetings as much of the information applies directly to your job
    - It is recommend that you get added to the listserv for non-DoGS (nondogs@lists.utah.edu) so that you are sent the agenda for each meeting
- Course Evaluations  (if applicable)
  - Register for training and Login
  - Edit → Preview Course Evaluations
  - Report → Download PDF Reports
    - Email updates will be sent with deadline reminders
    - Adam Halstrom- Program Manager, Student Course Feedback
      - scf@ctle.utah.edu