



# NEW GRADUATE ADVISOR CHECKLIST

Welcome as a new graduate advisor!

You will play a unique role in helping the graduate community in your department and your students' academic careers. You are present to guide graduate students administratively, intellectually, and professionally by ensuring adherence to policies set by the Department/College, The Graduate School, and the University of Utah. 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, and Thesis/Dissertation Defense; student record keeping (electronic and paper); facilitating the OPT/CPT process; registering international students for the ITA Workshops; 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

Danny Nelson, Chair, The Graduate School

Kelly Brown, Academic Advisor, Occupational & Recreational Therapies

Madeline Marshall, Graduate Advisor, College of Pharmacy

Terri Elder-Hale, Academic Advisor/Administrative Assistant, Medicinal Chemistry

## 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 listservs
  - [gapa@lists.utah.edu](mailto:gapa@lists.utah.edu)  
(moderator: Danny Nelson, [danny.nelson@gradschool.utah.edu](mailto:danny.nelson@gradschool.utah.edu))
  - [gradadvisors@lists.utah.edu](mailto:gradadvisors@lists.utah.edu)  
(moderator: Darci Rollins, [d.rollins@gradschool.utah.edu](mailto:d.rollins@gradschool.utah.edu))
  - [aynews@lists.utah.edu](mailto:aynews@lists.utah.edu)  
(moderator: Julie Hottes, [jhottes@sa.utah.edu](mailto:jhottes@sa.utah.edu))
  - [dogs@lists.utah.edu](mailto:dogs@lists.utah.edu) (if applicable)  
(moderator: Danny Nelson, [danny.nelson@gradschool.utah.edu](mailto:danny.nelson@gradschool.utah.edu))
- Call [Centrex/Avaya/Coral] to get voicemail password and to synchronize voicemail with UMail
- Request for Information Security Authorization  
<http://registrar.utah.edu/faculty/security-forms.php>
- Advising Technology Training  
[Academic Advising Center](#) (801.581.8146) for Advising Basics  
Steve Hadley, Academic Advising Coordinator  
[shadley@advising.utah.edu](mailto:shadley@advising.utah.edu) (801.851.8335)
- New Employee Security Guidance
- PeopleSoft for Advisors  
Clint Hayward, Computer Assistant, Registrar's office  
[chayward@sa.utah.edu](mailto: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  
<http://gradschool.utah.edu/contact-us>
- Review Graduate Catalog  
<http://gradschool.utah.edu/graduate-catalog>
- Schedule meetings with or email important contacts at the Graduate School
  - Darci Rollins, Administrative Program Coordinator, Graduate Records  
[d.rollins@gradschool.utah.edu](mailto:d.rollins@gradschool.utah.edu) (801.585.9873)
  - Jolyn Schleiffarth, Coordinator of Fellowships and Benefits  
[jolyn.schleiffarth@gradschool.utah.edu](mailto:jolyn.schleiffarth@gradschool.utah.edu) (801.581.6020)
  - Diane Cotsonas, International Teaching Assistant Program (ITAP) Coordinator  
[diane.cotsonas@utah.edu](mailto:diane.cotsonas@utah.edu) (801.585.6659)
  - Kelly Harward, Thesis Editor  
[kelly.harward@gradschool.utah.edu](mailto:kelly.harward@gradschool.utah.edu) (801.581.7642)

### *Familiarize Self with Other Important Campus Offices*

- [Office of Admissions](#)  
[admissions@utah.edu](mailto:admissions@utah.edu) (801.581.8761)
- [Income Accounting & Student Loan Services](#)  
[income@utah.edu](mailto:income@utah.edu) (801.581.7344)
- [International Student & Scholar Services](#)  
[international@utah.edu](mailto:international@utah.edu) (801.581.6388)

## RECRUITMENT

### Graduate Career Fairs

- Research graduate fairs of interest  
[Utah Graduate School Fairs](#)

**TIP:** Communicate with other graduate advisors in your college to potentially coordinate recruitment efforts

[List of Graduate Contacts by Department](#)

### Graduate Visitation Weekend (if applicable)

- Work with Graduate Director/Graduate Committee/Faculty to review applications 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 office personnel for assistance with lodging, meals, travel/transportation, reimbursements, etc.

## ADMISSIONS

### ApplyYourself Training

- Complete ApplyYourself online training
- Attend ApplyYourself (AY) New User Training  
Julie Hottes, Database Analyst  
[ayhelp@sa.utah.edu](mailto:ayhelp@sa.utah.edu) (801.581.6269)

**TIP:** 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 your Graduate Director regarding admissions decisions procedures.

**TIP:** 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](mailto:admissions@utah.edu) (801.581.8761)

## **Funding Offers**

### *Domestic Funding Offers*

- Acquaint yourself with college specific tuition, fees, and differential tuition
- Review previous offer letters to create 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

- Develop and Provide Orientation Materials. Possible subjects for orientation materials are listed below
  - UCard, parking passes
  - Advise students how to get added to department graduate mailing list
  - Assistantships, tuition benefit, and health insurance
  - Registering for courses
  - Familiarization with buildings, staff, faculty, degree offerings, research areas
  - Department graduate handbook (if applicable)
  - Graduate Catalog
  - Graduate School Resources

### Financials

#### *Tuition Benefit Program*

- Follow all Tuition Benefit Program Guidelines
- Follow the TBP Minimum Support Amounts and Deadline Calendar
- Fill out the 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 Assistantships*

- Acquaint yourself with the [procedures](#) by which students apply for teaching assistantships

## Academics

### *Degree Offerings*

- Know the current degree offerings in your program (M.S., Ph.D., etc.) and review the requirements for each
- Check to make sure your personal and departmental information is correct on the master list of degree programs and graduate contacts.  
<http://gradschool.utah.edu/dogs-contact-by-department>
- Get acquainted with student filing system in your office and necessary forms

### *Coursework*

- [Class Catalog & Schedules](#)

#### **Class Numbers and Permission Codes**

- Coordinate the retrieval of permission codes for your faculty (if applicable)

**TIP:** You may either provide the numbers to professors or be asked to give codes to students who request them

- CISPeoplesoftRecords and EnrollmentTerm ProcessingClass Permissions

### *Graduate Student Degree Tracking*

- Find the Degree Tracking in the Graduation Information block under the “Employee” tab in CIS
- Practice viewing students' progress in the program and submission of important forms, such as

#### *Supervisory Committee*

- Note the regular faculty in a committee as there are guidelines which must be met for those participating

#### *Program of Study*

- Familiarize yourself with the Program of Study requirements for each degree offered by your department

#### *Exams*



- Check the correct degree type (Thesis, Project/Nonthesis/Coursework only) so that appropriate requirements are fulfilled by the student

## 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 (if applicable)*

- 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. Ask your department DoGS if he or she would like your participation in DoGS meetings.

## Graduation

- Run a Graduate Departmental Audit Report (GDAR) for each degree offering
  - Go to “Graduation Information” block under “Employee” tab in CIS.
  - Check that specific units (A1 – A10) are marked 'Complete' at specific times in the semester

**TIP:** (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  
AS - Residency  
A6 - Program of Study Approvals  
A7 - Exams 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 any honors that they received at the University of Utah

### Career Services

- Find a Career Coach for your student body  
[Career and Professional Development Center](mailto:careers@sa.utah.edu)  
[careers@sa.utah.edu](mailto:careers@sa.utah.edu) (801.581.6186)
- OPT/CPT (Optional Practical Training- After Graduation/Curricular Practical Training- concurrent with course work)
- Work with the international center