Your Ticket to "Train"ing Success

Cindye Rudy and Julia Glover

Penn State World Campus

Academic Advising and Student Disability Services
World Campus started in 1998 with 5 academic programs, 48 enrollments the first year. Currently, 100+ programs - is the second largest campus at Penn State. Goal is to grow to 45,000 students.
Unprecedented student/staff growth, need for telecommuters in different time zones
Training is extensive and time consuming for current advisers (mentors)
Julia and I were charged with developing an online version of our training first for telecommuters, then for all
NACADA Guidelines

Used Current Training Checklist, Advising Performance Standards and Components of advising—From NACADA Clearinghouse (Habley, McClellan)

Conceptual
Technology
Informational
Relational
Personal/Professional

http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Advisor-Training-Components.aspx
Online Adviser Training

Evolution of the Training

Original online training organized by topics, ended right before phone duty

Telecommuters – needed an accelerated version while they were here for 4 weeks

Developed week to week training, like the design of a PSU online course

Successful, decided that all should be trained this way – this is a *graduate level course!*
Welcome to Advising!
The Welcome Buddy!

Trained welcome buddies - checklist developed
Get acclimated, demonstrate a welcoming environment
Introductions to staff
Set up With the Technology
Unit 1: Getting Started

1. Overview
2. Going Green
3. i3 - 2013 The Interactive Intelligence Phone System
4. Communication Tools
5. Identity Finder
6. Confidentiality/FERPA and Student Identification
7. Adding E-mail Signature to University Collaborative Suite (UCS)
8. Adding the Wd Advising Email Account
9. Being a Great Teammate
10. Dress Guidelines
11. Away Message
12. Calendar Sharing
13. Time-Off Procedures
14. ESSIC
15. Review of Activities
The Mentor

- Member of the Advising Team
- Experienced Adviser
- Monitors progress
Meet Your Training Team: Understanding the Training Process

Your training is shared among members of our Academic Advising and Student Disability Services (AA&SDS) team. In your program schedule, you will see opportunities to review, observe, and practice advising in AA&SDS with various staff as outlined here.

Administrative Support staff will coordinate your office set-up and supplies if you will work in Outreach Building, and the purchase of any needed equipment (especially for telecommuters). They will integrate you into listservs, calendars, and outreach. They will set up some of the initial meetings with AA&SDS leadership, which will “appear” on your calendar.

Your Welcome Buddy will assist you with many of the initial tasks related to starting a new position in our unit. This individual may or may not be a part of your future team assignment. The Welcome Buddy works with you during your first week.
Online Adviser Training

It Takes a Village
<table>
<thead>
<tr>
<th>Day</th>
<th>Lessons</th>
<th>Meet, Observe and Practice</th>
<th>Training Team Members</th>
<th>Done</th>
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<tbody>
<tr>
<td>Day 1-2</td>
<td>• Welcome</td>
<td>Overview of training and first week Overview of A &amp; LS</td>
<td>Mentor Associate Director</td>
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<td>Overview of Pillar Team Meet with Human Resources</td>
<td>Supervisor HR Rep</td>
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<td></td>
<td>• Lesson 1: Getting Started</td>
<td>Welcome Buddy guides initial tasks Welcome Buddy Homework</td>
<td>Welcome Buddy</td>
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<tr>
<td>Day 2-3</td>
<td>• Lesson 2: Our Organization and Team Structure</td>
<td>Majors Overview</td>
<td>Supervisor</td>
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<td>Review: Advising Syllabus, Unit Meetings</td>
<td>Mentor</td>
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<td>• Lesson 3: Student Populations</td>
<td>Introduction Degree Audit # 1</td>
<td>Pillar Team Trainer # 1</td>
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<td>Review Disqus Response</td>
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<tr>
<td>Day 3-4</td>
<td>• Lesson 4: Preparing to Work with Students</td>
<td>Introduction Degree Audit # 2</td>
<td>Pillar Team Trainer # 2</td>
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<td>Course Catalog vs Schedule of Courses</td>
<td>Mentor</td>
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<td>Discuss “Craig’s View”</td>
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<td>Day 4-5</td>
<td>• Lesson 5: Working with Students in the WDAvising General Email Account</td>
<td>ISIS Training</td>
<td>Cross-Team Trainer</td>
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<td>Review and Reflection Assessment of Progress</td>
<td>Mentor</td>
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<td>Supervisor</td>
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<td>Week 2</td>
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# The Village Moves to Box

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<tr>
<td><strong>Week 1</strong></td>
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<td>Day 1-2</td>
<td>• Welcome</td>
<td>Overview of training and first week</td>
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<td>Overview of A &amp; LS</td>
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<td>Overview of Pillar Team</td>
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<td>Welcome Buddy guides initial tasks</td>
<td>Welcome Buddy – John C</td>
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<td>Welcome Buddy Homework</td>
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<td>Review: Advising Syllabus, Unit Meetings, Observe advisers</td>
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<td>Review Discuss Response</td>
<td>Hodya</td>
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<tr>
<td>Day 3-4</td>
<td>• Review Pillar Team majors on Student website, Pillar Team degree webinars</td>
<td>Majors and Pillar Team Overview Introduction to OLEAD</td>
<td>John K Rich</td>
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<td></td>
<td>• Lesson 3: Student Populations</td>
<td>Observe advisers</td>
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<tr>
<td>Day 4-5</td>
<td>• Review Lesson 1, #3, 13</td>
<td>Set-up, making and receiving phone calls, setting up workgroup profiles etc.</td>
<td>Jackie Yingling and Cross Team Trainers, Victoria Andrea B, Sarah, or John C</td>
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<td>Introduction to AD PR</td>
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<td>• Lesson 4: Preparing to Work with Students</td>
<td>Intro to Preparing to Work With Students</td>
<td>Dawn</td>
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Let’s get started!

**Week 1**

1. Overview
2. Agenda for Working with Your Training Team
3. Lesson 1: Getting Started
4. Lesson 2: Our Organization and Team Structure
5. Lesson 3: Student Populations
6. Lesson 4: Preparing to Work with Students
7. Lesson 5: Working with Students in the WDadvising General Email Account
8. Review of Activities

**Week 1 includes NACADA Conceptual, Technology, and Informational Components**
Overview

The first thing we need to do is to get you connected with technology so that you can start the important job of being an academic adviser! At the beginning of this week we will review the following topics, and show you how to create some accounts: Communication Tools, Identity Finder, Family Educational Rights and Privacy Act Regulations (FERPA), E-mail Signatures, Dress Guidelines, Away Messages, Calendar Sharing, Time-off Procedures, ESSIC (Employee Self-Service Information Center), and Purchasing Cards.

You will also get to know who you are working with this week. You will review the Penn State Mission Statement, and the Outreach and Online Education, World Campus, and Advising Mission Statements. You will also learn about the degrees and certificates we offer, review the Advising Syllabus and Responsibilities of Adviser, gain an understanding of our Advising Pillars, and find out how we collaborate with Inside Track when accepting new students.

You will be introduced to several populations of students that we typically work with as World Campus advisers. These groups include adult learners, students with disabilities, the military and veteran population, traditional-age students, international students, first-generation college students, and LGBT Students.

You will complete the following online units of training this week: Course Home Page, Program Outline, Navigation Introduction, Welcome, Getting Started, Our Organization and Team Structure, Student Populations, Preparing to Work with Students & Working with Students in wdadvising.
Agenda for Working with Your Training Team

Day 1-2

- Supervisor
  - Meetings - You will meet with our Associate Director for a 30-minute overview of Academic Advising and Student Disability Services (AA&SDS). You will also meet with your supervisor, who will continue to welcome you to our Unit.

- Welcome Buddy
  - Signature station – you will visit a signature station in order to activate your Penn State account
  - FERPA Access Account Form
  - Staff ID – you will visit the Hetzel Union Building (HUB) on campus to have your photo taken and secure a staff ID card. If you were previously employed at PSU, you may skip this step.
  - Human Resources – if you have not already met with the Outreach Human Resources team, your welcome buddy will make an appointment for you.
  - Tour - You will take a tour of all 3 floors of the Outreach Building.
  - Emergency Procedures – a member of our Emergency Procedures team will review our process for emergencies with you.

- Online Training
  - Course Home Page
  - Program Outline
  - Navigation Introduction
  - Welcome
  - Getting Started
Day 3-4

- Supervisor
  - Your supervisor will provide an overview of the majors advised by your team

- Mentors and Trainees
  - Advising mentors will answer any questions you have about the online training units
  - You will be trained by a pillar team trainer on degree audit #1 (View Webinars)

- Online Training
  - Our Organization and Team Structure
  - Student Populations

Day 4-5

- Supervisor
  - Meet with your supervisor at the end of the week to discuss your progress
  - Report out on whether or not you have completed all of Week 1 training, or if you need more time

- Mentors and Trainees
  - Advising mentors will answer any questions you have about the online training units
  - You will be trained by a pillar team trainer on degree audit #2 (View Webinars)

- Online Training
  - Preparing to Work with Students
  - Working with Students in WDAdvising
Lesson 1: Getting Started

Going Green

Academic Outreach and World Campus seek to support Penn State’s sustainability efforts. Being Green is embedded in our mission. For information about sustainability initiatives, please visit http://sustainability.psu.edu.

As you go through this training, there are many resources that you may want to bookmark in order to refer to them later. In an effort to be Green, please try to limit what you print, and keep in mind that some documents are best to bookmark as they are frequently updated. We understand everyone has different learning styles and realize that some learn best with paper copies, so please feel comfortable printing if that suits you best. Please print double sided and expand margins to reduce paper used.

Some resources you will want to bookmark instead of print are listed below:

- Program Team Assignment Chart
- ISIS Codes
Organizations

World Campus Blue & White Society is student membership in the Penn State Alumni Association, which is a network of more than 100,000 Penn State alumni worldwide. Penn State World Campus established its own chapter of the Blue & White Society in 2011, and World Campus students vote into office their Executive Board to guide the chapter. They participate in activities like the All-University Day football game, where they can enter a lottery to win tickets to attend the game and the World Campus tailgate. Two student are selected to carry the World Campus banner on the field at halftime, which is quite an honor! The Blue & White Society is for World Campus students only, and is advised by both the Student Engagement Team and academic advisers. During your training you will set up an appointment with an adviser to learn more about this organization. To read about how students can apply, click here to read more about the Blue & White Society.
Alpha Sigma Lambda is America's only chapter-based honor society celebrating the scholarship and leadership of full- and part-time undergraduate adult learners. Our University Park chapter is composed of World Campus students, University Park resident instruction students, and Continuing Education students at University Park, including those taking courses through our Lewistown (Pennsylvania) centers. Membership in this honor society is by invitation only. We host an annual induction ceremony and celebratory reception each year for our new members, their family, and friends. Students who are unable to travel to the University Park campus for the ceremony are inducted at a distance. During your training you will set up an appointment with an adviser to learn more about this organization. Click here to learn more about the Alpha Sigma Lambda Society.

The Penn State IFC/Panhellenic Dance Marathon, affectionately known as THON, is a two-day dance marathon that takes place every February at the Penn State University Park campus. It is also a yearlong effort to raise funds and awareness for the fight against pediatric cancer. Since 1977, THON has raised more than $101 million for the Four Diamonds Fund at Penn State Hershey Children's Hospital. It is the largest student-run philanthropy in the world by involvement and revenue, with over $12 million raised at the 2013 event. World Campus students are encouraged to get involved in fundraising and promoting awareness, and there is a World Campus adviser assigned as the adviser to this group.
Online Adviser Training

Week 2

1. Overview
2. Agenda for Working with Your Training Team
3. Lesson 6: Adviser Resources
4. Lesson 7: Degree Audits
5. Lesson 8: Educational Planning
7. Lesson 10: eLion
8. Lesson 11: Exceptions to Academic Policies and Procedures
9. Review of Activities

Week 2 includes NACADA Technology and Informational Components
Lesson 9: Academic Records and Student Progress Management

Drop/Add and Late Drop/Add

After registering, students may drop and/or add courses to change their schedules. The dates for the drop and add periods for each semester are listed on the Academic Calendar. Typically this period includes the first week of classes and a few days into the second week. The drop and add period begins on the first day of classes. The add period extends eight hours beyond the end of the drop period.

There is no limit to the number of times a student can use the drop and add procedure during the drop/add period. Drops are not reflected on students' records. Although there is not a fee for dropping or adding credits during the semester/session drop and add periods, once classes start, tuition reimbursement is adjusted according to the Tuition Adjustment Policy. To drop all courses after classes begin, a student must withdraw.
Academic advisers use eLion to access the rosters of their assigned advisees, view students' academic records, correspond directly with their advisees, record notes of advising contacts, look up a student's adviser, and obtain additional information to assist them in their advising responsibilities.

Advisers can also see a student’s semester schedule, grades, placement test results, and more by using the menu on the left side of the eLion site. To view a demonstration of both the adviser and student versions of eLion, click to access the eLion demo site and review the information provided for Students and Advisers.

Bookmark this link: eLion demo. It can be helpful when walking a student through any procedures in eLion.

Bookmark and/or print the eLion content and referral codes that you will need for your notes.

- eLion Content and Referral Codes

Aside from eLion, adviser comments and contact records can also be viewed in ISIS.

PLEASE REFER TO YOUR TRAINING TOPICS SHEET TO SEE WHO WILL REVIEW ELION NOTES WITH YOU.
Lesson 10: eLion

Intent to Graduate

At the beginning of the semester, students activate their intent to graduate. There is a specific three-week period that they are permitted to do so on eLion. Students can find these dates on the Academic Calendar on the registrar’s website.

If students miss the deadline for activating their intent to graduate on eLion, they can get on the graduation list by calling the college in which they are enrolled.
Online Adviser Training

Week 3

1. Overview
2. Agenda for Working with Your Training Team
3. Lesson 12: Working with Students on Phone Shifts
4. Review of Activities

Week 3 includes NACADA Informational and Relational Components
Fun Activities

Fun quizzes and games to make the learning more interesting!

1. What do you need to know first?
   - A) Where he lives
   - B) Student ID number
   - C) Who his adviser is
   - D) His GPA

2. What questions would you ask him, as you explore his status?
   - A) Why DuBois?
   - B) What associate degree is he currently enrolled in?
   - C) What is his career goal?
   - D) What baccalaureate degree is he interested in?
   - E) A & C
   - F) B & D

3. What else would you like to know about him and his situation?
   - A) Who is his World Campus adviser?
   - B) Is he completing or planning to complete his associate degree?
   - C) Has he spoken to anyone at DuBois?
   - D) When does he want to make the transition to DuBois?
   - E) All of the above
   - F) A & C
   - G) B & D

4. What actions would you take?
   - A) Refer him to PSU DuBois Registrar
   - B) Refer him to his World Campus Adviser
   - C) Refer him to the World Campus Student website
   - D) Send an e-mail to the Outreach Registrar to request a change of campus to DuBois

Working with Students on Phone Shifts Quiz
SCENES FOR LEARNING AND REFLECTION (PART 1) INTRODUCTION

Introduction
Length: 2:18

Adult Returning to College
Length: 4:07

Lack of Academic Progress
Length: 4:39

Upset Transfer Student
Length: 4:00
Weeks 5 and 6
Identify a [Seminar or Workshop](#) that interests you through the Center for Workplace Learning and Performance. Discuss your selection with your supervisor.

Register the [New Penn State Employee Orientation](#)—Center for Workplace Learning and Performance.

Complete the [Reporting Child Abuse Training](#) through Skillport.
Professional Development Opportunities

Week 5 & 6 include NACADA Personal and Professional Components.

Lesson 15: Your Journey through Professional Development

Professional Organizations and Resources

Organizations

There are a variety of professional organizations available for improving your skills, obtaining knowledge, and developing ideas, both inside and outside the workplace. Work with your mentor and your supervisor to identify those organizations that interest you and meet your needs in relation to your professional development and learning goals.

ACHE

Association for Continuing Higher Education (ACHE) is an organization of colleges, universities, and individuals who promote lifelong learning and excellence in continuing higher education. The organization publishes a newsletter and journal entitled the Journal of Continuing Higher Education.

NACADA

NACADA, the National Academic Advising Association, is an organization that "promotes and supports quality academic advising in institutions of higher education to enhance the educational development of students." They send a semimonthly email entitled "NACADA Highlights" to keep members informed of news, publications, updates, and events.
The Training Continues

Telecommuting

Straight Ahead
Beginning Your Work with an Assigned Roster

- Welcome
- First advising appointment
- Teach technology
- Review the degree audit
- Recognize and respond to common concerns
- Identify At-Risk students
- Utilize resources
Lesson 16: Beginning Your Work with an Assigned Roster

Common Questions/Concerns for New Students

Review of Transfer Credits

New students are typically most concerned about the evaluation and review of their transfer credits. Some students bring credits from programs for which Penn State does not have equivalent courses. For example, paralegal credits do not transfer as we do not have a paralegal program at Penn State. Coursework from a non-accredited institution may not transfer although students can, in this situation, request Credit By Validation. See Policy 42-86 Institutions That are Not Regionally Accredited.

Other types of credits include military credits and credits from programs such as fire fighter or police training. Review the admissions information related to transfer credits.

Math Assessment

The math assessment is often a source of concern to new students. Students may have transferred in math courses from other institutions and are frustrated to find our courses require a placement level on the math assessment regardless of prior transfer credits. Advise the student this assessment is available to provide helpful information regarding their readiness for courses and
Mapping the Continuing Student Journey

- Early Progress Reports
- Credit load
- Academic Preparedness
- Unrealistic Expectations
- Entrance to Major
- Major Choice
- Math Assessment
- Working with Instructors and Faculty

- Internships
- Change of Campus
- Change of Major
- Transferring Credits
- Credit By Exam
- At-Risk Students
- Academic Reviews
- Intent to Graduate
- Career Services
Lesson 17: Mapping the Continuing Student Journey

Common Questions and Areas of Concern to Continuing Students

Early Progress Reports (EPR)

Early Progress Reports provide a pulse check on your roster of students in the spring and the fall semesters. The reports are sent out between the 3rd and 6th weeks. This may be your first indication that a student is struggling with the demands of attending Penn State. The Early Progress Report may spark a number of conversations including credit load, lack of preparedness, major choice, unrealistic view of time commitment, family and/or work obligations.

The email advising sends for either the Not Actively Participating (NAP) student or the Actively Participating student (AP) both cover Understanding the Report, Talking to your Professor, Knowing your Options and Considering Student Financial Aid Implications.
You are done!

Week 9 & 10

Survey to Gain Your Feedback on the Training Program

Congratulations! You have completed the Adviser Training!

We are happy to have you on our team, and we look forward to your continued success.

This program was designed to provide you with the skills and knowledge that you need to move forward to the next steps in your training: responding to the wadvising e-mail account, answering general student telephone inquiries, and finally, advising your own student roster.

Please meet with your supervisor and mentor to discuss your next steps.

But before you do, we'd appreciate it if you would take a few moments to complete this end-of-training survey so that we can gather feedback and keep on improving this training for future new staff.
Reflection

- Staying current with the content – things change at a rapid pace at World Campus
- Maintenance/checking links
- Our.Outreach/Intranet
- Need feedback from every new adviser
- Closed Captioning
Successes

• Good feedback
• Efficient from a time standpoint
• Consistent and thorough
• Self-paced at the graduate level
• Useful as a reference
Reference

- http://www.capecod.edu/web/adult-learner
- http://www.cvm.umn.edu/accr/contact/home.html
- http://ontheedgeofskating.blogspot.com/2012/06/part-3-it-takes-village-to-pay-it.html