

Navigate360: Academic Advisor Deboarding

Checklist for deboarding, or the transition of an Academic Advisor to another unit, in Navigate360

Steps	Process	Completed By
<input type="checkbox"/>	<p>Leaving Advising Position</p> <p>When an Academic Advisor leaves their position, whether they are moving positions/colleges or leaving the University entirely, they will need to notify Rachel Swatzell (swatzellr@etsu.edu) upon resignation or two weeks in advance, whichever comes first, of advisor's last day with the following:</p> <ul style="list-style-type: none"> • Advisor's last day in college/unit • Who will be taking over advisor's caseload 	Advisor / Advising Lead
<input type="checkbox"/>	<p>Availability</p> <p>Advisor leaving their position will need to adjust their <i>Availability</i> to <i>A Range of Dates</i>, the <i>End Date</i> being their last day advising for the unit.</p> <p>The Advisor(s) taking over the caseload will need to create <i>Availability</i> at the previous advisor's <i>Location(s)</i> for <i>A Range of Dates</i>, the <i>Start Date</i> being the next business day after the advisor's last day of advising/meeting with students.</p>	Advisor(s)
<input type="checkbox"/>	<p>Notify Students</p> <p>Advisor leaving will need to notify students of the change in advisor.</p>	Advisor
<input type="checkbox"/>	<p>Advisor's Last Day</p> <p>On end-of-day of the advisor's last day, Rachel will need to complete the following:</p> <ul style="list-style-type: none"> • Delete advisor's expired <i>Availabilities</i> • Delete V3 Report <i>Configured Schedules</i> • Remove Care Unit permissions as needed • Reassign advisor's caseload • Update the Advisor Major and/or Minor Search Tool • Update internal Advising assignment sheet <p>To consider:</p> <ul style="list-style-type: none"> • One week of overlap in reassigning advising assignments for the existing and extending advisors 	OEDAA
<input type="checkbox"/>	<p>Configuration Changes</p> <p>Will the new advisor need <i>Default Appointment Length</i> changes?</p>	OEDAA