



# Advising Manual



**2020/2021 Academic Year**

THE OFFICE FOR  
**STUDENT  
SUCCESS**

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## University of Montana Undergraduate Academic Advising Guidelines

### Introduction:

Academic advising is critical to student success at University of Montana (UM). All undergraduate students are required to meet with their advisor at least once each semester to review educational progress, discuss future plans, and secure schedule approval prior to registration. Additional meetings are recommended for information and guidance on dropping and/or adding courses, changing/declaring majors, exploring available resources, and ensuring that graduation requirements are met.

The UM catalog is the official source of information on the UM General Education Requirements, requirements of individual academic programs, and graduation-related policies. The Advising Manual is a comprehensive policy and procedural guide for faculty and staff advisors at UM.

Faculty and professional advisors, as well as peer advising assistants, facilitate positive academic advising experiences by:

- o helping students to develop mentoring relationships with faculty and professionally trained staff
- o encouraging students to fulfill their obligation to plan in advance for advising sessions
- o educating students to understand and accept their responsibilities in the advising process and for advising decisions, and
- o promoting open and productive dialogue about the student's academic, personal, and career goals.

### Advising Best Practices:

No two advising sessions are ever the same. There are guidelines and best practices, however, that apply to most interactions between an advisor and advisee. These include:

- First, do no harm. Ask questions, double check information, and always document your interactions.
- Always reference a student's current academic record during an advising session. If you do not have access to printable student transcripts, access student records in Banner, Cyberbear, or Degree Works.
- Always maintain confidentiality. The student's academic record and all discussions (face-to-face, by phone or via email) between you and an advisee cannot be discussed with a third party unless you have the advisee's authorization. See the FERPA website maintained by the Registrar's Office – link included in the Resources section of this document – for detailed information on student confidentiality.
- Go beyond approving a class schedule and discuss the student's major choice, career or professional objectives, co-curricular opportunities and university resources. Help students make the most of their undergraduate experience at UM by connecting them with relevant resources and opportunities rather than simply making referrals.
- Advisors help students find the information they need to make good decisions and effectively advocate for themselves; advisors do not make decisions for the advisee.
- Use the available tools and resources to maximize the effectiveness of individual advising sessions with students. There are numerous technological and other tools available to advisors. Familiarize yourself with available tools by attending relevant trainings.

### Minimum Expectations for the Advising Appointment:

Advising numbers are distributed to academic departments 3-4 weeks prior to the Priority Registration period. Advising procedures and distribution of advising numbers vary widely among academic departments. At a minimum, the advising session should cover the following:

- Ask the student how they are doing and how their semester is going. Are they enjoying and performing well in their current courses? Are there additional support services they might benefit from? Based on student's responses and subsequent needs, provide student with available campus resources, encourage the student to utilize them, and, when possible, follow-up with the student to ensure that they have taken advantage of relevant resources. *Distributing the advising number shouldn't be the goal of advising.* Sometimes students are looking for the opportunity to discuss an issue but don't know how to start the conversation.
- Is the student's major a good fit and might a minor or second major be appropriate?
- Using Degree Works, conduct a comprehensive degree evaluation to inform student of progress towards degree completion (major requirements, GERs, Upper Division credits and general electives to meet the 120 credit requirement). Educate students on how they can access Degree Works to self-serve.
- Check to see if a student has registration-preventing and/or other holds, release advising pin, and notify student of when they can register for upcoming semester classes based on the priority registration timetable.
- Discuss the student's plans following graduation and encourage the student to take advantage of co-curricular or academic enrichment opportunities such as internships, service learning, undergraduate research, education abroad, etc. Also encourage the student to investigate federal student aid, scholarships and other higher education funding opportunities.
- At the end of the advising session with each student, summarize the main issues that surfaced in your advising interaction with the student, and ask them what their next steps are with respect to completing tasks and addressing issues pertaining to their academic progress.

### Expectations of Students: How to Prepare for the Advising Appointment:

**Although academic advising is a relationship of shared responsibility between the advisor and the student, it is important for students to realize that the ultimate responsibility for meeting all graduation requirements is their own.** Students improve their academic planning and success by learning about the academic requirements of their academic program(s), UM policies on registration and graduation, and by fully using available advising services. In order to prepare for a productive advising appointment, students should:

- Develop a plan of courses for upcoming semester registration and be prepared to discuss your long-term academic, personal, and professional goals.
- Login to the Cyberbear Student Profile to check for registration-preventing holds. If holds are present, try to clear them before the advising appointment.
- Research academic enrichment and other beyond-the-classroom opportunities of interest to discuss during the advising appointment.

- Be honest with your advisor about issues impacting your ability to be successful. Advisors can only help with issues or situations they are aware of. This requires open and effective communication with your advisor.

Resources:

- University Catalog – <http://umt.edu/catalog>
- Advising Manual - [http://www.umt.edu/oss/for\\_faculty\\_staff/Advising%20Manual.pdf](http://www.umt.edu/oss/for_faculty_staff/Advising%20Manual.pdf)
- Academic Advising Certificate Program and training opportunities:  
[http://www.umt.edu/oss/for\\_faculty\\_staff/academic\\_advising\\_certificate.php](http://www.umt.edu/oss/for_faculty_staff/academic_advising_certificate.php)
- Advisor’s Toolkit: [http://www.umt.edu/oss/for\\_faculty\\_staff/toolkit.php](http://www.umt.edu/oss/for_faculty_staff/toolkit.php)
- Degree Works UM website: <https://www.umt.edu/registrar/FacultyStaff/DegreeWorks.php>
- EAB Navigate UM website: <http://umt.edu/navigate>
- Mountain Campus Advising Directory: <http://www.umt.edu/advising>
- Missoula College Advising Directory: <http://mc.umt.edu/aac/Advising/Who.php>
- Registrar’s Office FERPA Website (Privacy and Release of Student Education Records) - <http://www.umt.edu/registrar> (look for “FERPA” link)
- National Academic Advising Association (NACADA) Statement of Core Values of Academic Advising - <http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Core-values-declaration.aspx>
- CAS Standards for Academic Advising - <http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/CAS-Advising-Standards.aspx>

**\*Although advising tends to be busiest right before each semester’s priority registration period (i.e. during priority advising), advising happens year round, whether or not students are preparing for registration. Part of an advisor’s job is to help students understand the difference between acquiring an advising number and being advised.**

**\*\*University policies and procedures relevant to advising frequently change. ALWAYS reference the most current UM Catalog for up-to-date information. If you aren’t positive about information when working with students, don’t guess: check with colleagues, the Registrar’s Office, and/or the Office for Student Success to verify details to ensure you provide accurate information to students.**

## COVID-19 Information and Resources

### Protocol for students who need to Isolate or Quarantine due to Covid-19

Students are responsible for notifying their instructors, employers, or others who may need to be aware that the student will be away during their isolation or quarantine time. In order to assure that their instruction continues during the time they are out of the classroom, students should:

- Contact their current professors indicating that they will be out of class for medical reasons (no specifics needed), provide information about how they can be reached, and how long they will be out of the classroom. The faculty will work with the student to arrange for appropriate continuation of instruction.
- Contact their academic advisor (if necessary and if comfortable doing so) for any logistical assistance during their time of isolation or quarantine.
- Refer to the materials provided to them by the quarantine and isolation coordinator, the MCCHD, and/or Curry Health for specific guidance regarding their isolation or quarantine rules.

If a student requests assistance from their academic advisor (must be in writing/email) regarding their COVID-19 exposure or test result, the advisor may assist the student as described below. No advisor should take actions on behalf of the student without a signed information release.

If a student discloses potential exposure to COVID19 the advisor should immediately direct them to call Curry Health Center if they have not yet been tested. If the student has been tested and a diagnosis confirmed, please encourage the student to follow suggested protocols.

Instruct the student to inform their course faculty that they need to be away from classes for an extended time (the student is not required to disclose their diagnosis to their instructors).

Ask the student if they discussed with their faculty a plan for maintaining academic progress in the course.

- If yes, review plan and ask where you can help.
- If no, encourage the student to be in communication with their faculty about a possible plan, noting that they do not have to disclose their diagnosis, simply that they will need to be away from classes for a period of time. Prior to the student contacting their professors(s), advisors can review potential options:
  - Requesting Remote/Fully Online Access if possible; and/or
  - Requesting Assignment Extensions; and/or
  - Requesting to Change Grading Mode; and/or
  - Requesting I or N Grade Changes; or
  - Withdrawing from class
- If plan or compromise cannot be reached, ask student if they would like to consult with Disability Services for Students.

### **Additional COVID-19 information and resources:**

- “Keep on Learning” website for students:  
[https://www.umt.edu/umonline/keep\\_on\\_learning/default.php](https://www.umt.edu/umonline/keep_on_learning/default.php)
- “Keeping UM Connected” website: <https://www.umt.edu/uc/keep-connected/>
- UM’s Coronavirus Updates website (primary site for COVID-19 updates and resources):  
<https://www.umt.edu/coronavirus/default.php>
- Curry Health Center Wellness “COVID-19 Virtual Stress Busting Kit”: <https://www.umt.edu/curry-health-center/Docs-General/chc-covid-stress-busting-kit-links.pdf>
- Emergency Student Support Fund: <https://www.umt.edu/student-affairs/emergency-student-support-fund/default.php>

## **Education Advisory Board Navigate Student Success Management System (Navigate)**

**Navigate** is a student success management platform for students, faculty, advisors, University administrators, and other student support services. The University of Montana will utilize Navigate to improve student success and facilitate communication among students, faculty, and staff across campus. Navigate replaced Starfish beginning Fall 2020 Semester.

We will be rolling out Navigate in a phased approach. Phase I Navigate user groups for Fall 2020 Semester will include the entire campus advising community, Athletic Academic Services, Experiential Learning and Career Success, Financial Education Program, various tutoring programs, and the ASUM Renter Center.

In addition to the web-based Navigate platform, Navigate is a free mobile app that all undergraduate students at UM are encouraged to download and use regularly. Students can download the Navigate mobile app by visiting the UM Navigate website (<http://umt.edu/navigate>) or by searching for “Navigate Student” in the App Store, Google Play, etc. For more information on features for students within Navigate, please visit <https://www.umt.edu/navigate/for-students/default.php>.

Detailed information, training materials, and FAQs on Navigate are available on the UM Navigate website at <http://umt.edu/navigate>. The website content is organized into various sections – use the top ribbon to locate the different sections. Please visit the website regularly as we will publish additional information and resources as we continue to expand the functionality and scope of the Navigate platform.

### **The following bullets provide information, guidance, and training materials for Navigate users**

- **Navigate Quick Start Guide** (walks users through setting up availability, calendar syncing, and appointment campaign management): <https://www.umt.edu/navigate/for-instructors/umt-navigate-quick-start-guide-production.pdf>
- **Navigate Training Guide for advisors and other staff users:** <https://www.umt.edu/navigate/for-advisors/EAB%20Navigate%20Advisor%20Training%20Guide.pdf>
- **Detailed Navigate information for faculty/instructors:** [https://www.umt.edu/navigate/for-instructors/excerpt-from-faculty-training-toolkit-for-um-navigate-website\\_for-instructors-page.pdf](https://www.umt.edu/navigate/for-instructors/excerpt-from-faculty-training-toolkit-for-um-navigate-website_for-instructors-page.pdf)
- **Navigate Production Site** (login with your Net ID and password): <https://umt.campus.eab.com/>
- **Navigate Test Site** (login with your Net ID and password): <https://umt.campus-training3.eab.com/>
- **Setting up and managing the Kiosk in Navigate:** <https://www.umt.edu/navigate/for-advisors/kiosk-user-guide.pdf>

### **Early Alert**

Beginning Fall 2020 Semester, our campus Early Alert initiative for all undergraduate courses will also be administered through Navigate. Summary information on Early Alert is available at <https://www.umt.edu/navigate/early-alert/default.php>.

- **Instructions for faculty on providing feedback on students through Navigate:** <https://www.umt.edu/navigate/early-alert/instructions-for-faculty-on-completing-progress-reports.docx>
- **Instructions for advisors on pulling Early Alert Reports:** <https://www.umt.edu/navigate/for-advisors/instructions-for-advisors-on-pulling-alert-reports.docx>

#### Early Alert: Fall and Spring Semester Progress Reporting Schedule

Week of Instruction	Primary Focus of Progress Report	Deployment Dates (Fall 2020 Semester dates shown below)
Week 2	Attendance prior to 15th class day. <i>The 15th class day is the last day a student can drop individual courses with a refund or to withdraw (drop all courses) from the semester with a partial refund.</i>	8/31 (8am) - 9/4 (11:59pm) 15 <sup>th</sup> class day is 9/9
Week 5	Early academic progress. <i>For courses with assignments within the first five weeks of the semester, the Week 5 Progress Survey is an opportunity to give students feedback on early performance in a course.</i>	9/14 (8am) – 9/25 (11:59pm)
Week 8	Academic progress prior to 45th class day. <i>The 45th class day is the last day a student can drop individual courses with a 'W' on the transcript.</i>	10/5 (8am) – 10/16 (11:59pm) Last day to drop classes with "W" is 10/21
Week 12	Academic progress prior to final course drop/change deadline. <i>The last Progress Report before a student can withdraw from the semester (drop all courses) with a 'WP' or 'WF' on the transcript and no refund.</i>	11/2 (8am) – 11/13 (11:59pm) Last day to drop classes with "WP" or "WF" is 11/18

#### **Basic expectations of advisors for using Navigate**

Communicating with students and regularly monitoring Early Alert activity: Navigate provides advisors and other users with a powerful and sophisticated tool to communicate with students. At a minimum, advisors should use Navigate to request that students schedule appointments during the priority advising period each semester, to track and respond to student feedback provided by instructors through Early Alert as appropriate, and to conduct re-recruitment outreach following the priority registration period each fall and spring semester. It is strongly encouraged that all advisors communicate regularly with their assigned students each semester by sending students an email every two weeks (the more frequent the communication, the better!). Advisors and other Navigate users have the ability to send text messages through the platform as well.

Documenting advising appointments: all advisors are expected to complete Appointment Summary Reports in Navigate for all advising appointments with students. Detailed guidance on completing Appointment Summary Reports is available on p. 18 of the training guide at <https://www.umt.edu/navigate/for-advisors/EAB%20Navigate%20Advisor%20Training%20Guide.pdf>. The following section on documentation provides additional guidance on information advisors should document from appointments with students.

## Documentation

Documentation provides a record of the conversation between the advisor and the advisee. Documentation is there to help ensure continuity of advising interactions and to protect the student and the advisor in case questions arise later in the student's academic career. A good guiding principle for documentation is to consider what the next advisor really needs to know about the advising session. Considering the capability of our online advising tools to store documentation from advising appointments, it is no longer necessary to maintain physical advising files for students. See the Navigate and Advisor's Toolkit sections for more information on and expectations for documentation and the capabilities of our numerous online technology tools for advisors.

- Standard content
  - Details from discussions on program(s) of study, courses for future registration, and review of program-specific and General Education requirements, using Degree Works to show student's progress toward degree completion.
  - Program specific differences (are there professional guidelines or compliance issues that should be considered)
  - Include policies and procedures explained, referrals made, recommendations and resources discussed
  
- Referrals
  - Sensitivity issues (less is typically more; if it is an especially touchy scenario, explain documentation to the student, draft it together and get student's approval)
    - Use generic terms such as "discussed appropriate campus resources" whenever possible. Here are some additional examples:
      - Student shared an experience of sexual assault = "Made referral to SARC"
      - Student shared that they have cancer = "Made referral to Curry Health Center for health concern"
      - Student shared mental health concern = Made referral to Curry Health Center for health concern"
  - If no sensitivity issues are present, be specific ("Walked student to Career Services to schedule appointment")

All advisor notes and documentation are part of a student's academic records. They are accordingly covered by FERPA Privacy Laws and cannot be disclosed to a third party without the student's clearly articulated authorization. Students also have the right to review any and all parts of their advising records. Additional information on FERPA is provided in the next section.

## FERPA

The Family Educational Rights and Privacy Act of 1974 (FERPA), in conjunction with Montana law, prevent advisors from releasing any part of a student's academic registration unless there is a legitimate educational interest or the student has consented to release of information. The Registrar's Office maintains a comprehensive webpage detailing the requirements and implementation of FERPA. Some FERPA issues for advisors include:

- Advisors MAY NOT release any part of a student's record (what courses they are registered for, whether they attended or missed an appointment, if they are on probation or suspension) to a third party (typically a parent or other family member) unless there is a release on file with the

Registrar's Office - check SPACMNT if you have access to Banner; call the Registrar's Office for more information if you do not have access to Banner.

- Advisors MAY discuss academic policies or resources with that same third party, provided it does not disclose a student's status
- The FERPA release form is available on the Registrar's website. An advisor can serve as the student's witness (indicate on the form that the student's identity and signature have been verified and return the form to the Registrar's Office). See Appendix B for a copy of the FERPA release form, also called Consent to Disclose Educational Records.
- FERPA does not prevent the third party from providing the advisor with information about the student.
- The advisor rarely has information that the student can't access. The student is almost always going to be the better source of information about his or her standing in classes during the semester. Helping the parent or family member understand what the student can access sometimes reduces the frequency of requests for FERPA-protected information.

### **Title IX Reporting Requirements**

**Title IX:** The U.S. Department of Education's Office for Civil Rights (OCR), enforces Title IX of the Education Amendments of 1972. Title IX protects people from discrimination based on sex in education programs or activities that receive Federal financial assistance. Title IX states that:

*No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance.*

**All employees at The University of Montana are considered "Responsible Employees," which requires them to report incidents of gender-based discrimination (e.g. sexual violence, sexual harassment, rape, sexual assault, domestic violence, and/or stalking).** In accordance with Title IX laws, students must be made aware of the following: If any employee of UM, including instructors, teaching assistants, advisors, etc., learns of any potential gender-based discrimination, they are required to notify the Title IX Coordinator, Alicia Arant (243-5710, [eoaa@umontana.edu](mailto:eoaa@umontana.edu), Main Hall Room 006), immediately. Once an incident is reported to Title IX, the student will be contacted by the Title IX Coordinator for follow up. Students can also report directly to the Title IX coordinator in regards to any gender-based discrimination.

### **Confidential Resource**

The Student Advocacy Resource Center (SARC) provides **free and confidential** support and brief counseling services for students who have experienced gender-based discrimination. SARC is located in Curry Health Center, Room 108, and their number is **243-4429**. Students are also welcome to call their **24-hour support line (406) 243-6559**. Speaking with a confidential resource does not disqualify students from making a formal report to the Title IX Coordinator if and when they are ready. In the confidential setting, students will be made aware of available resources and reporting options. An advocate is available for all students upon request through SARC.

## Advising Approaches

Academic advisors are among the many campus professionals who provide students with information about requirements, opportunities and procedures. Effective advising, though, goes well beyond the informational (this is *how* to add or drop a class) to help a student integrate all elements of the academic experience (these are the pro's and con's for you to consider before adding or dropping this class). Advising is substantively more complicated than picking out classes.

Every academic advisor has a unique style and collection of techniques for working with students. Your approach with a given student may change over time, depending on the student's needs. Different advising approaches are described in this section.

**Developmental advising** focuses on the "whole student." Crookston (1972) was the first to use the term *developmental advising* and proposed that this advising approach incorporates a relationship in which there is an agreement between advisor and advisee that responsibilities are shared. He defined developmental advising as a systematic process through which students identify and achieve their academic, personal, and career goals with the support of advisors and institutional resources. Ender, Winston, and Miller (1982) define developmental advising as a process that is concerned with human growth, is goal related, and requires the establishment of a caring relationship. According to Winston, Jr. et. al. (1984), "advisors serve as role models and mentors in this relationship. Developmental advising incorporates all resources on campus, particularly in integrating academic and student affairs" (p. 442). The authors also posit that "academic advising based on developmental theory legitimately recognizes this [student] wholeness and serves to encourage effectively wholesome development of each student's life in and out of the classroom" (pp. 90-91). In a nutshell, developmental advising entails getting to know students as individuals so that we can base our guidance on their individual situations, capabilities, and goals.

A primary objective of developmental advising is for the advisor to facilitate student growth, skill mastery, and, ultimately, independent decision-making. Developmental advising depends on interactive dialogue, with the advisor's questions stimulating self-reflection and discovery on the part of the student. Although developmental advising is typically associated with the freshman undeclared major, it can be equally effective with a senior declared major.

Common discussion threads of a developmental advising session might include the following:

- Tell me about your academic interests (what did you like best/least in high school?)
- What are your goals for the semester/year?
- Have you thought about extra- or co-curricular activities that might complement your academic pursuits?
- Have you thought about what you'd like to do after graduating from college?

**Prescriptive advising** is most commonly used in majors or academic programs which follow a linear, clearly defined academic plan with limited flexibility. However, prescriptive advising goes well beyond proving a student with a list of courses and generating a schedule that begins at Point A (the top) and ends at Point B (the bottom). It should consider the unique experience of the student in generating a plan that the student can reasonably complete in a time-effective manner. The student's interest or motivation in the program should also be discussed.

Common discussion threads in prescriptive advising might include the following:

- Do you have any AP, IB or prior college work that might impact your course selection?
- Are you involved in any programs or receive scholarships/ funding that might impact your credit load?
- How many credits do you plan to take this semester?

**Proactive** (also referred to as **Intrusive**) **advising** identifies a student at risk or in difficulty, and targets specific resources to the student in a meaningful way. Instead of waiting for the student to contact the advisor, the advisor reaches out and tells the student the date and time of the appointment. Our Freshman Academic Outreach program for students placed on academic probation after their first semester of study is an example of proactive advising; we proactively meet with these students to address the issues that impacted their academic performance and connect them with appropriate campus resources. Pre-requisite enforcement is another example: students cannot register for a course without successful completion of one or more foundational courses. If the student fails or withdraws from a pre-req, they are dropped from the higher level course before the start of the next term. Students are notified that they need to make the change (prescriptive), but if they fail to act, the task is done for them (proactive).

Typical elements of proactive advising include the following:

- Determine risk factors
- Anticipate potential areas of difficulty
- Establish preventative measures or supports through connection with campus resources

**Career Advising** - As stated by Gordon (2006):

Career advising may be thought of as a less psychologically intensive approach than career counseling. The emphasis is on information and helping students understand the relationships between their educational choices and general career fields rather than how to cope with intense career-related personal concerns. Career advising helps students understand how their personal interests, abilities, and values might predict success in the academic and career fields they are considering and how to form their academic and career goals accordingly. (pp. 11-12)

Career counselors, on the other hand, "provide the more traditional career counseling functions, such as helping students with career self-assessment, job search and job placement activities, or counseling students who are experiencing more stressful situations such as coping with academic and career transitions and indecisiveness" (Gordon, 2006, p. 14).

It is always a good idea to refer students to Career Services for guidance on career-related exploration and decision making. Ideally, academic advising and career counseling complement each other so that students are equipped to make the most informed decisions possible about their long-term academic and career goals.

**Appreciative Advising** seeks to incorporate Appreciative Inquiry into academic advising practices. According to Bloom (2002), "Appreciative Inquiry is an organizational development tool that focuses on bringing out the best in people and organizations, instead of viewing them as problems that need to be solved." Bloom posits that the link between Appreciative Inquiry and academic advising seems clear:

As advisors, we are constantly trying to help our students reach their full potential, and one of the primary tools that we have for empowering students is asking questions. Appreciative Inquiry challenges us to make sure that we ask positive questions aimed at helping students discover their strengths, abilities, and skills. Ask open-ended questions whenever possible and encourage students to push themselves throughout their educational careers.

## Assessment

Assessment is tied to the objectives of your department or unit. These objectives should be based on the unit's mission, link to institutional priorities, and, most importantly, positively contribute to student learning. Department or unit advising objectives can be evaluated through (1) articulating relevant student learning outcomes expected to result from advising sessions and (2) identifying and tracking measurable indicators of success for those outcomes. In a nutshell, assessment should answer the question, "How do we know our advising practices are effective?" It is important to regularly review various elements of your advising, such as:

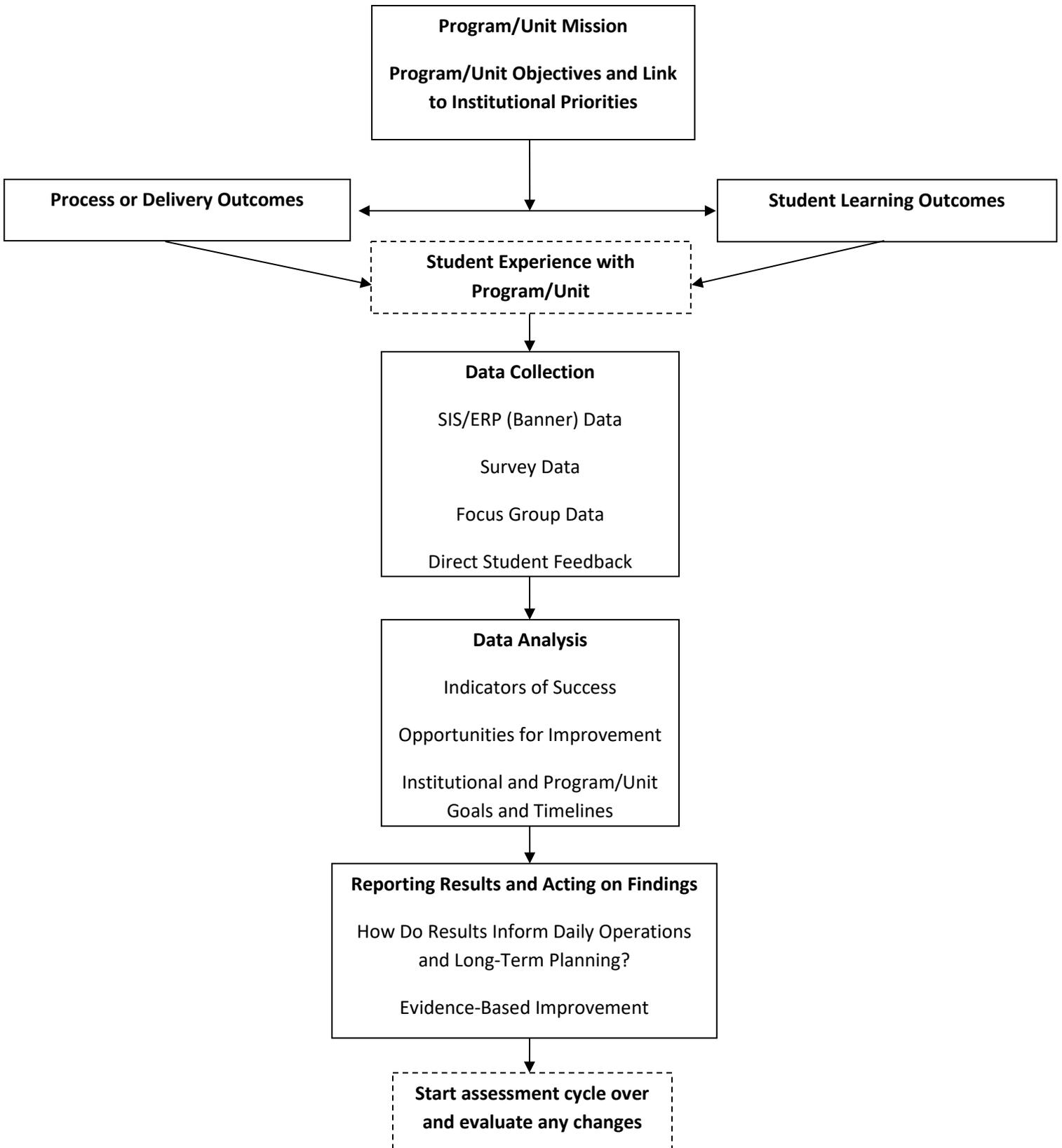
- Accuracy- When a new advisor joins your team, how are they trained, supported, and evaluated? This will have a substantial impact on that advisor's ability to provide consistent and accurate advising to the student.
- Availability- Students need advising throughout the year, not just during the peak registration periods. Do your students know how to reach advisors in your unit and when it is appropriate to do so?
- Approachability- Advisors are uniquely situated to maintain ongoing relationships with students throughout their educational careers. With this in mind, it is critical that students are able to approach advisors for guidance at every step of their collegiate journey. Are students comfortable approaching you and other advisors in your unit? Are there barriers in your unit? Sustaining a welcoming and supportive atmosphere for students is one of the most important responsibilities of advisors. Effective signage is an important and often overlooked aspect of advisor approachability.
- Metrics- How can you measure whether or not you are achieving your department's objectives and whether student learning outcomes are being met? A focus on measurable outcomes allows us to evaluate the efficacy of our efforts and continuously improve our service based on data-driven decision making.
  - o Does your unit have advising survey instruments that are regularly distributed to students?
  - o Does your unit conduct student focus groups?
  - o Are you accessing and reviewing relevant data from available sources (Banner, Starfish, Degree Works, InfoGriz, APS, etc.) and strategically tailoring advising approaches based on what you learn from the information? For example, failure in "sentinel" major courses, failure to maintain good academic standing, and/or regular course drops or repeats should drive proactive advising outreach.
  - o You can also informally solicit feedback from students (advisees as well as student workers) on what they find useful or frustrating. Ask students who are struggling in addition to high achievers.

Cuseo (2008) conveys that "transforming assessment results into demonstrable improvement represents the key final step that closes the loop in the assessment process, bringing it back to its original purpose - to improve advising effectiveness" (p. 381).

The graphic on the following page, adapted from Darling's (2010) assessment flowchart, represents the assessment cycle.

\*Important resources for advising assessment include the CAS Standards for Academic Advising Programs (see Appendix A) and the UM Advising Guidelines (see first section of this Manual).

## Assessment Cycle



Adapted from Darling's (2010) assessment flowchart

## Placement Tests

The University of Montana utilizes placement tests to determine initial placement in writing, math, foreign languages, and chemistry. Placement tests measure readiness, not aptitude.

**1. Math Placement** (<http://www.umt.edu/mathplacement>)

**\*See Appendix C for Math Placement and Sequencing Chart**

Math placement at UM depends on two criteria: a student's declared major and placement level. Many incoming freshmen and transfer students still needing to meet their math requirement will need to take a math placement exam before registering for a math course.

UM utilizes Maplesoft math placement exams and offers three version of the exam: Arithmetic (M01), Algebra (M02), and Pre-Calculus (M03). Students should take the appropriate exam based on their declared or intended major. See information below for details.

**\*Students should speak with their academic advisor(s) for guidance on selecting the appropriate math placement exam for their program(s) of study.**

**EdReady Montana** is a personalized, self-paced, FREE online program that helps students master the mathematics skills they need to succeed in college-level math courses. EdReady modules were designed by selecting skills necessary for success in each math course.

By completing EdReady, students are placed directly into the appropriate college-level math class of their major. This saves students from having to take a semester or more of developmental coursework that does not count toward degree requirements. In addition, this prevents students from needing to take a math placement exam and allows students to focus on the precise skills they will need to succeed in their math courses at UM.

To learn more about EdReady Montana and to sign up, contact Lauren Fern, EdReady Montana Coordinator at UM, at [Fernl@mso.umt.edu](mailto:Fernl@mso.umt.edu).

UM uses **ACT and SAT scores** to determine students' placement into math courses for the majors listed below. If students don't meet the minimum scores required to place into college-level courses (100-level or higher), they have the option of taking the appropriate Maplesoft math placement exam to try to place into college level courses. Students without minimum ACT or SAT test scores who choose not to take a math placement exam will be required to enroll in a developmental course (below 100-level) in order to acquire the skills necessary to succeed in college-level math courses.

The minimum ACT mathematics portion score required to place into college level math courses for the majors listed below is 22 and the minimum SAT mathematics portion score is 520. For students in the below majors who bring in these minimum scores or higher, the math placement exam requirement is waived.

**Majors that use ACT and SAT scores to determine math placement:**

Mountain Campus: Accounting, Anthropology, Art, Central and Southwest Asian Studies, Classics, Communication Studies, Communicative Sciences and Disorders, Community Health and Prevention Sciences

(HHP), Dance, East Asian Studies, English, Environmental Studies, Finance, French, Geography, German, Health Enhancement (HHP), History, History/Political Science combined degree program, International Business, Japanese, Journalism, Liberal Studies, Management, Management Information Systems, Marketing, Media Arts, Music, Native American Studies, Philosophy, Political Science, Pre-Nursing, Psychology, Radio-Television Production, Russian, Social Work, Sociology, Spanish, Theatre, Undeclared/Exploratory, and Women's, Gender, and Sexuality Studies.

Missoula College: Accounting Technology, Administrative Management, Business Media Design, Computer Support, Culinary Arts, Customer Relations, Food Service Management, Hospitality Management, Information Technology, Management, Medical Assisting, Medication Information Technology, Medical Reception, Paralegal Studies, Practical Nursing, Pre-Nursing, Pre-Radiologic Technology, Pre-Respiratory Therapy Technology, Pre-Surgical Technology, Sales and Marketing, and Social Media Management.

The math placement exam requirement will also be waived for students in the above majors if one of the following conditions is met:

- By earning a score of 3 or above on the AP Calculus AB or BC exam or AP Statistics exam
- By earning a score of 4 or above on the IB Mathematics HL exam
- By earning a score of 50 or above on the CLEP subject examinations in College Algebra, College Algebra-Trigonometry, Trigonometry, Pre-Calculus or Calculus
- By successfully completing GAC010 – Math II: Probability, Statistics and Finance or GAC 016 – Math III: Calculus and Advanced Applications
- By successfully completing a college-level math course while enrolled in either a high school dual enrollment program, a high school pilot program, or while enrolled at another college or university prior to a student's transfer to UM.

Students in the below majors will need to take the appropriate Maplesoft math placement exam unless one of the above conditions is met. Please see the note immediately below for additional, important information:

- \*\*Students in the below majors should check with an academic advisor in their program of study to verify that their AP, IB, CLEP, GAC, or dual enrollment, etc. credits are acceptable prerequisites for additional math and/or other major-specific coursework. The appropriate Maplesoft math placement exam may be required in some situations.

**Majors that DO NOT use ACT and SAT scores to determine math placement:**

Mountain Campus: Biochemistry, Biology, Chemistry, Computer Science, Computer Science/Mathematical Sciences combined degree program, Economics, Ecological Restoration, Ecosystem Sciences and Restoration, Education, Elementary Education, Exercise Science Applied (HHP), Exercise Science Pre-Professional (HHP), Forestry, Geosciences/Geology, Mathematics, Medical Laboratory Sciences, Microbiology, Neuroscience, Pharmacy, Physics, Pre-Athletic Training (HHP), Pre-Engineering, Pre-Medical Sciences, Pre-Pharmacy, Pre-Education, Parks, Tourism, and Recreation Management, Resource Conservation, and Wildlife Biology.

Missoula College: Building Maintenance, Computer Aided Design, Carpentry, Diesel Technology, Electronics Technology, Electrician Helper, Energy Auditor, Energy Technology, Facility Management, General Associate of Arts Degree, Heavy Equipment Operation, Nondegree, Pre-Diesel Technology, Pre-Heavy Equipment Operator, Pre-Pharmacy Technology, Precision Machine Technology, Pre-Welding Technology, Recreational Power Equipment, Sustainable Construction Technology, Sustainable Construction, and Welding Technology.

*Academic Advisors*: Please note that M151 is a one semester version of M121 and M122. This is a fairly intense class and students should be advised to take M151 only if they need a *refresher* of the material (as opposed to *learning* the material). If they are in the latter situation, we strongly advise the students to take the two semester sequence of M121 and M122.

## 2. Writing Placement

The various test scores listed below and/or the AP Language and Composition exam (**NOT the AP Literature and Composition exam!**) are used for placement into Mountain Campus Writing courses as shown below. Where there are multiple scores indicating conflicting placements, the highest placement is used.

Banner SOATEST code	Description	Placement into WRIT 095	WRIT 101-eligible score range	WRIT 201-eligible score range
A07	ACT Combined English/Writing	17 or below	18-31	32-36
SWR	ACT Writing subscore	6 or below	7-10	11-12
S07	SAT Writing score	430 or below	440-690	700-800
S08	SAT Essay subscore	6 or below	7-10	11-12
A08	ACT Writing subject score	18 or below	19-32	33 or higher
A13	ACT English Language Arts (ELA) score	17 or below	18-31	32 or higher
S14	SAT Writ/Language Test Score	24 or below	25-36	37 or higher

**AP Language and Composition** exam scores of 3 or above transfer in as 6 credits and fulfill the WRIT 101 General Education Requirement. Please refer to <http://admissions.umt.edu/apply/advanced-credits/ap.php> or see Appendix D.

**Students entering UM without WRIT 101 or one of the tests listed, or those wishing to challenge their initial placement, should take the WRIT Placement Assessment.** This assessment accepts rolling submissions throughout the year. No pre-registration is required. Students with disabilities may contact Disability Services to arrange for accommodations.

**The WRIT Placement Assessment is now online in Submittable.** The link to the active Submittable form will be updated regularly. If you need the current Submittable link, please email [writingplacement@umontana.edu](mailto:writingplacement@umontana.edu) to

request it. Students can submit their placement essay electronically and take as much time as they need. Essay scoring/placement determination is not immediate; scoring sessions take place roughly once per month throughout the year.

Banner SOATEST screen codes used for WRIT placement:

Test scores	
WRIT 095	1
WRIT 101	3
WRIT 201	3*
WRIT 101 exemption	4

\*WRIT 201 eligibility noted in SFASRPO, additional entry in SOATEST, and student notification via email regarding differences between 101 and 201. If a student is placed into WRIT 201, there will be a 3 in the 201 box as shown above, but there will **also** be a 5.5 or 6 in the MTW box.

WRIT 201 satisfies **both** the WRIT 101 General Education Requirement and the Intermediate Writing Course General Education Requirement. It's a "double-dip" course. It is important for students to understand that placement into WRIT 201 does not exempt them from the WRIT 101 requirement. WRIT 201 uniquely satisfies both the WRIT 101 and Intermediate Writing Requirements; no other Intermediate Writing Requirement courses satisfy WRIT 101.

\*\*The presence of the ALPH code in SOATEST indicates fall enrollment eligibility. Spring registration is unrestricted.

For information on the Writing and math placement tests for **Missoula College** and **Bitterroot College** students, please see <http://mc.umt.edu/aac/Placement/default.php>

The Writing Placement Chart below was used for academic years prior to 2016/2017. Some students currently enrolled for the 2020/2021 academic year may have scores that are not included on the current chart listed at the beginning of this section. The old chart below may be helpful in assisting students with writing placement scores not included in the current placement chart listed at the beginning of this section.

Decision Rule	MUS Writing Assessment Score	SAT or ACT Writing Sub-score	SAT Writing Section	Combined English/Writing ACT	AP Lang. & Comp.*	Course Placement
Score in any of these ranges	5.5-6	11-12	700-800	32-36	3-5*	WRIT 201**
	3.5-5	7-10	440-690	18-31	n/a	WRIT 101

	2.5-3	5-6	390-430	16-17	n/a	WRIT 095 or take placement exam to challenge placement
Score below any of these cut-offs	Below 2.5	Below 5	Below 390	Below 16	n/a	WRIT 095

### 3. Languages (Information provided by World Languages and Cultures (WLC))

#### What is the Language Placement Exam?

The Placement Exam is a nationally recognized Computer Adaptive Placement Exam, first created for Brigham Young University. It is a free, computer based program. The WebCAPE assessment tests reading comprehension, grammar, and vocabulary in French, German, and Spanish in a multiple choice format. The exam is timed and usually takes about 30 minutes to complete. The total time from start to finish is taken into consideration; students must inform the WCL administrative associate prior to the exam if special accommodation is required. Group exams are offered during Orientations. WLC also offers individual testing via an online link.

#### What languages are tested?

Currently WLC tests only Spanish, German, and French. Students with an interest in or prior experience with Russian, Japanese, Chinese, Latin, Blackfoot, Arabic, or American Sign Language can contact Sam Alvey at 243-2603 or [sam.alvey@mso.umt.edu](mailto:sam.alvey@mso.umt.edu) to set up an appointment with the respective sections.

#### English is not my first language, but I did not take the TOEFL [ESL assessment], can I waive the requirement?

Students who are not native English speakers and have passed WRIT 101 (or equivalent) or a COMX course in English may have the MCL requirement waived through petition. Alternatively, international students who have not completed the TOEFL, heritage speakers, and students who are fluent in a language that is not offered at the U of M are welcome to waive the requirement. WLC requires the student set up an appointment with the chair of the department. The student must find another fluent speaker of the language they wish to use to waive the requirement. A written paragraph in the language and a brief interview with the other speaker must be witnessed by the chair.

#### Who should take the Placement Exam?

WLC recommends that students with prior language experience take the placement exam. This includes students wishing to major or minor in French, German, or Spanish and transfer students with partial credit from another institution. Students with prior college credit or AP credit do not necessarily need to take the exam, but are welcome to do so.

#### How much does the exam cost?

The Placement Exam is free.

#### How many times can the exam be taken?

The exam can be taken three times. It is progressive, so each exam is different. However, if a student does not receive the desired score after the third try it is recommended that they take the course.

#### Is the test timed?

The test is timed, but there is generally no time limit. Most students complete the exam in about 30 minutes. The time is considered in the score, particularly for remote testing. WLC requests anyone whose remote test lasts longer than an hour retake the test in the office.

**When are results received?**

Results are immediate. The scores placing over the 102 level are recorded on the SOATEST form in Banner. Information is also available in Cyberbear for Faculty and Advisors in the “Prior Education and Testing” section of the Student Profile. Students taking the test remotely must contact Sam Alvey at [sam.alvey@mso.umt.edu](mailto:sam.alvey@mso.umt.edu) for advice regarding placement, they are asked to keep a copy of their result sheet for their advisor. If a student tests out of the exam the results will be entered into their records [SOATEST in Banner]. Students testing out of the general education requirement or attempting to test into an advanced course must meet with an instructor to test speaking and listening comprehension. A stamped and authorized copy of the results is available upon request from Sam Alvey [[sam.alvey@mso.umt.edu](mailto:sam.alvey@mso.umt.edu), 406-243-2603]. Scores are usually entered into SOATEST immediately after the test results are received. Scoring is calibrated on a scale from 0-1000:

**French Placement**

Below 260	101
260-333	102
334-403	201
Above 403	Into 202 [403-500] or into 301 [500-1000 –four semesters achieved]

**German Placement**

Below 281	101
281-383	102
384-492	201
Above 492	Into 202 [492-500] or into 301 [500-1000 –four semesters achieved]

**Spanish Placement**

Below 270	101
270-345	102
346-427	201
Above 427	Into 202 [427-500] or into 301 [500-1000 –four semesters achieved]

**Is credit received for the exam?**

Students do not receive credit for these exams; if a student successfully places into the Intermediate level [201 or higher] the language general credit requirement will be waived by the student’s major advisor /chair upon successful completion of the student’s major. The credits not used towards the language requirement [8-10 credits for first year and additional 8 if testing out of the second year language course] can be used towards the students major or a complimentary minor.

**Students must adhere to their major requirements regarding additional language proficiency requirements.**

Please contact Sam Alvey at [sam.alvey@mso.umt.edu](mailto:sam.alvey@mso.umt.edu), or 406-243-2603 for any further questions regarding the exams, remote testing, or if you are interested in taking the Latin, Russian, Japanese, Chinese, Arabic, Blackfoot, or ASL placement exams.

#### 4. Chemistry Placement

There are two Chemistry tracks at UM: one for students requiring one year or less of chemistry (starting with CHMY 121N) and another for students intending to take two or more years of chemistry (starting with CHMY 104/141N). The Chemistry Placement Exam is only required for students whose major requires them to take either CHMY 104 Preparation for Chemistry or CHMY 141N College Chemistry I. Students should automatically have access to the exam in Moodle if they are declared in a major that requires CHMY 104/141N. Alternatively, students can request access to the placement exam by contacting Jimmy Stevens ([james.stevens@umontana.edu](mailto:james.stevens@umontana.edu)) or the Office for Student Success at either [officeforstudentsuccess@mso.umt.edu](mailto:officeforstudentsuccess@mso.umt.edu) or 406-243-2800.

##### CHMY 121N Introduction to Chemistry

- Chemistry Placement Exam is **not** required.
- Majors and concentrations requiring CHMY 121N: Pre-Nursing, Pre-Physical Therapy, Biology (Biological Education, Ecology and Organismal with one year of chemistry, Field Ecology with one year of chemistry, Human Biology with one year of chemistry, and Natural History), Ecosystem Science and Restoration, and Health and Human Performance.
- CHMY 121N with a grade of a C- or higher is a pre-requisite for CHMY 123 Intro to Organic and Biochemistry.

##### CHMY 104 Preparation for Chemistry

- CHMY 104 is only recommended for students whose majors will require them to complete CHMY 141N, but has a Chemistry Placement Score lower than a 13.
- CHMY 104 requires a Maplesoft M02 score of 12 or higher, an ALEKS math score of 3 or higher, or completion of M 090 with a minimum grade of an RC+.
- CHMY 104 is designed to prepare students for CHMY 141N. Students who struggle with a significant portion of the questions on the Chemistry Placement Exam must improve their skills at scientific reasoning, applications of algebra, and the fundamentals of chemistry before they can succeed in College Chemistry. This course is designed to provide a sound understanding of these fundamentals.
- CHMY 104 is **not** recommended for students whose majors require CHMY 121N and it does not meet the Natural Science General Education Requirement.

##### CHMY 141N College Chemistry I

- CHMY 141N is only recommended for students whose majors will require them to complete two or more years of chemistry. This course requires a Chemistry Placement score of 13 or higher, as well as a Maplesoft M02 score of 12 or higher, a Maplesoft M03 score of 10 or higher, an ALEKS math score of 4 or higher, or completion of M 095/115/121/162/171 with a C- or better.
- Majors or concentrations requiring CHMY 141N: Pre-Engineering, Pre-Health Sciences (Pre-Medical, Pre-Dental, Pre-Veterinary, etc.), Pre-Pharmacy, Biochemistry, Biology (Cellular and Molecular, Ecology and Organismal with two years of chemistry, Field Ecology with two years of chemistry, and Human Biology with two years of chemistry), Chemistry, Geosciences, Medical Laboratory Sciences, Microbiology, and Neuroscience (Cellular and Molecular).

- Students with a Maplesoft M02 score of 11 or lower or an ALEKS math score of 3 or lower are advised to delay the start of their chemistry sequence until they have completed the appropriate algebra sequence based on their major.

### Co-Requisite Support Courses

Co-requisite support, as defined by Complete College America (CCA), is “placing students into college-level courses and providing support while enrolled in those courses” (see <https://completecollege.org/strategy/corequisite-support/>). As outlined on CCA’s website, over a million students in the United States start college in remediation, and approximately a third of these students are unnecessarily involved in non-credit developmental courses. In addition, data collected from across the country show that traditional mediation (using non-credit pre-requisites) does not work for most students.

In contrast to the low completion rates for traditional pre-requisite developmental classes, the co-requisite support efforts are often increasing college-level gateway course pass rates to nearly three times the rate of traditional remediation, and it’s happening in about a quarter of the time.

UM began offering co-requisite support courses in math and writing during the Fall 2017 Semester. UM is continuing to scale co-requisite support courses as much as possible. For the 2020/2021 Academic Year, the following co-requisite support courses are available to students who would otherwise place into developmental sections:

Math: M 105 Plus; M 115 Plus, M 121 Plus. For more information on co-requisite support courses in math, contact Lauren Fern at [fernl@mso.umt.edu](mailto:fernl@mso.umt.edu).

Writing: WRIT 101 Plus. For more information on co-requisite support courses in writing, contact Jessica Dougherty-McMichael at [Jessica.dougherty@mso.umt.edu](mailto:Jessica.dougherty@mso.umt.edu).

### General Education Requirements

#### 1. Foundational Information and Objectives

The Preamble to the General Education section of the 2020-2021 University of Montana Catalog states:

*The University of Montana-Missoula's General Education Program provides a broad academic base that supports both undergraduate learning at The University of Montana-Missoula and continued learning following graduation. While the General Education Program offers students considerable flexibility in selecting courses, it has a set of common educational objectives for all students.*

*In accordance with the mission of The University of Montana- Missoula, these objectives are to develop competent and humane individuals who are informed, ethical, literate, and engaged citizens of local and global communities. Students should become acquainted with issues facing contemporary society, participate in the creative arts, develop an understanding of science and technology, cultivate an appreciation of the humanities, and examine the history of different American and global cultures. Upon completion of the general education requirements students should be able to articulate ideas orally and in writing, understand and critically evaluate tangible and abstract concepts, and employ mathematical and other related skills appropriate to a technologically focused society.*

*In summary, the General Education Program is designed to provide a high quality intellectual foundation that accommodates all UM students whether in liberal arts or professional programs. This foundation will be reinforced, expanded, and refined as students continue through their course of study. Students are encouraged to prepare for productive roles in their chosen fields by cultivating civic awareness vital to the greater community and a democratic society. The acquired skills will allow students to examine critically the human experience and achieve genuine confidence in their knowledge and abilities. For the General Education Program to accomplish its goals, students must assume primary responsibility for their growth and education.*

The General Education Requirements (GERs) are sometimes perceived as extra requirements, quite separate from the important work of the major. Students select what they consider the “least objectionable” option from a list of course names; the decision sometimes relates more to the day, time and professor than the actual subject matter. Other students will sometimes comment that they don’t have a major yet, so they’ll just take GERs. Left to their own devices, two years down the road those students could have completed their GERs and still have no idea about a major.

**Students will typically follow your lead as an advisor when you discuss the GERs. If you present them as an added burden, students will view the GERs as exactly that. On the other hand, if you talk about GERs as a mechanism for gaining skill sets needed for a competitive job market, that same student will enthusiastically engage in the academic planning process. Conversations about GERS can often be a platform for a broader discussion of a student’s goals for their undergraduate experience.**

Encourage your students to keep track of their credits and use Degree Works and the UM Catalog to track their progress toward degree completion - how many they need, how many they’ve attempted, and whether any restrictions apply (repeatability, technical attribute credits, activity/skills course limits). All baccalaureate students need a minimum of 120 credits to graduate; some will need more.

## 2. Basic considerations

All students are required to complete the General Education Requirements (GERs) detailed in the governing catalog in effect at their original matriculation date. Caveats and fine print:

- If a new set is adopted after their initial enrollment, the student may elect to follow the newer requirements but they may not use a combination of two systems of GERs.
- Students may use different catalogs for their major and GERs only if the original date of matriculation is prior to 201370.
- The course must be listed in the catalog corresponding to the year in which the course was taken, not the student’s catalog year, in order to meet a GER.
- If a student’s enrollment is not continuous, they may follow the catalog in effect at the time of their original enrollment, provided they can graduate within six academic years of that catalog’s publication.
- The Faculty Senate passed a motion to allow students transferring to UM from a quarter or trimester institution to “round” credits for the purposes of satisfying GERs. The motion reads as follows:
  - o In order to determine if transfer course work satisfies UM General Education requirements, the credits for each course are rounded. For example, courses from schools on other calendars (such as quarters or trimesters) that are articulated on UM transcripts at 2.5 credits or higher will be rounded to 3 credits for the purpose of fulfilling, or partially

fulfilling, General Education requirement groups I-XI. This “rounding rule” does not apply when calculating students’ total completed credits for graduation requirements, nor towards the 39 upper-division credit requirement.

- Coursework used to satisfy the Upper Division requirement may be taken for Cr/NCr and must earn a passing grade.

Generally speaking, all coursework to be applied towards the GERs must be taken for a traditional letter grade; the earned grade must be a “C-” or higher. Exceptions:

- AP, IB, and CLEP credits listed as “Cr\*” (see appendices D, E, and F for lists of all AP, IB, and CLEP credits awarded at UM).
- Coursework taken at an institution that uses Cr/NCr instead of a traditional letter grading system AND a grade of “Cr” is equivalent to a C- or higher.
- The student has been granted an exception by the Graduation Appeals Committee.

### 3. Requirement Groups

To earn a baccalaureate degree, all students must complete successfully, in addition to any other requirements, the following General Education Requirements. Students who have completed an approved lower-division general education program at an approved Montana institution of higher education should refer to the catalog section on General Education for Transfer Students.

All General Education courses must be at least 3 credits, must be introductory and foundational, and have no more than one pre-requisite. The General Education Committee may allow exceptions for upper-division courses, courses fewer than three credits, and for courses with more than one pre-requisite, if the proposing unit can justify such an exception.

**Group I: English Writing Skills** - The writing requirement consists of three components, Introductory College Writing, Intermediate College Writing, and Advanced College Writing, usually within the major. Some of the trickier aspects of this series include:

- WRIT 101 was formerly known as ENEX 101. A student with a grade of C- or higher in ENEX 101 does not need to retake WRIT 101.
- A transferred course of fewer than 3 credits will satisfy the requirement if it is posted to the UM transcript with an equivalent of WRIT 101.
- Intermediate Writing Courses must be taken at UM or at another institution within the Montana University System (MUS). Courses taken at institutions outside the MUS may transfer for degree credit, but will not satisfy the writing requirement without authorization from the Writing Committee (see Appendix G for detailed information). As of September, 2017, MUS transfer courses articulated on UM transcripts as equivalents to UM Intermediate Writing Courses (e.g. LIT 110L) can be retroactively applied to satisfy the Intermediate Writing Requirement. For example, if a student took LIT 110L at MSU-Bozeman during the 2015/2016 academic year and transferred to UM during the 2016/2017 academic year, this course would satisfy the Intermediate Writing Requirement even though the MUS course equivalent Intermediate Writing Requirement transfer policy didn’t go into effect until Fall 2017 semester.
- Students may not use a course from the Advanced College Writing Requirement list to satisfy the Intermediate College Writing requirement.

- Some of the courses listed as “Intermediate Writing” are upper division (300 or higher) but do not meet the Advanced Writing Requirement.

**Group II: Mathematics-** All students, irrespective of major, must earn a grade of C- or higher in one of the following: M 104, 105, 115, 118, 121, 122, 135, 151, or a 3-credit math course for which one of the listed courses is a pre-requisite. Students may also use various CLEP or AP tests. Some of the finer details:

- The Maplesoft math placement test is for placement only and does not exempt a student from the math requirement.
- If a student enters UM with a course posted as an equivalent to one of the math courses listed above, or with a designation of “M TR1M,” the math requirement has been met irrespective of the number of credits (e.g. 2 credits of TR1 M is sufficient).
- Math skills tend to erode quickly if not used regularly. It is in a student’s best interest to satisfy the math requirement early in his or her college career.

### **Group IIIa: Modern and Classical Languages –**

The language requirement can be met in any of the following ways:

1. by achieving a C- or better in a second-semester language course offered at the University of Montana;
2. by achieving a grade of C- or above in a language course numbered 201 or above at the University of Montana;
3. by presenting a transcript record of completion with a grade of C- or better of a second- semester (or more advanced) language course at an accredited college or university;
4. by achieving an appropriate score on a placement exam administered by the offering department;
5. by receiving verification of an appropriate level of proficiency in any other natural language in collaboration with the Department of World Languages and Cultures. Note that the student’s native language, if it is not English, can be used to fulfill this requirement.
6. By demonstrating equivalent skill in any of these or other languages in testing administered by the Department of World Languages and Cultures.
7. International students from non-English-speaking countries may satisfy this requirement by presenting a sufficient TOEFL score (contact Admissions Evaluators to verify sufficient TOEFL scores).

### **Group IIIb: Exceptions to the Modern and Classical Languages Requirement –**

The extended majors listed below have been granted exceptions to the Modern and Classical Language requirement. Students graduating in any one of these majors are not required to complete the Modern and Classical Language requirement.

Accounting & Finance, Art - Bachelor of Fine Arts only (BA students take Foreign Language)BAS Applied Arts and Science, Biochemistry, Biology, Chemistry, Computer Science, Curriculum & Instruction, Ecosystem Science & Restoration, Forestry, Geoscience, Health and Human Performance, Management Information Systems, Management & Marketing, Mathematics or combined Mathematics /Computer Science or Computer Science/Mathematics, Media Arts - Bachelor of Fine Arts only (BA students take Foreign Language), Medical Laboratory Science, Microbiology, Music and Music Education, Neuroscience, Pharmacy, Parks, Tourism and Recreation Management, Physics and Astronomy (Astronomy, Computational Physics, Teaching Broadfield

Science concentrations), Resource Conservation, Theatre - Bachelor of Fine Arts only (BA students take Modern and Classical Language requirement), Wildlife Biology

Students graduating with an Associate of Arts (AA) Degree have also been granted an exception to the Group III requirements. Missoula College and Bitterroot College students who continue to Mountain Campus without earning an AA Degree will need to complete Group III unless their declared four-year major has been granted an exception.

#### Important Notes:

- Passing a proficiency test administered by the Modern and Classical Languages Department does not result in degree credit.
- If a student completes two majors, the FL requirement is determined by the first/primary major. Important note: some majors require completion of FL as a part of the major requirements.
- Encourage students with prior experience with the language to take the relevant placement test.

These are **minimum requirements**. Many students will benefit greatly from additional writing, math and language study. For example, additional language fluencies can increase students' options for international study and/or employment, and their competitiveness for scholarships and graduate/professional study. Ideally, the advisor will work with students to determine educational and professional goals to develop comprehensive academic plans.

**Groups IV-XI:** These requirement groups give breadth to the undergraduate experience. They expose a student to fields of study beyond the major and help achieve our goal of educating "informed, ethical, literate and engaged citizens of local and global communities" (taken from the Preamble referenced earlier). There are eight categories; students need a minimum of 3 credits in all but the Natural Sciences, where six credits (including a lab) are needed. Some courses may satisfy more than one group. Courses that satisfy these requirement groups have a letter in the course number that corresponds to the requirement group (e.g. CRWR 210A satisfies the Expressive Arts requirement group).

- **Group IV: Expressive Arts (A)**
- **Group V: Literary and Artistic Studies (L)**
- **Group VI: Historical and Cultural Studies (H)**
- **Group VII: Social Sciences (S)**
- **Group VIII: Ethics and Human Values (E)**
- **Group IX: Democracy and Citizenship (Y)**
- **Group X: Cultural and International Diversity (X)**
- **Group XI: Natural Sciences (N)**

#### 4. Transcript Review

Every advisor has his or her unique "best practices" for transcript review. A unit's documentation practices can also influence how reviews are done, if a student receives a copy, or whether a copy is retained by the unit. The availability of Degree Works has also changed many aspects of transcript review and makes the process of degree requirement evaluation much easier for advisors and students. Some key elements of transcript review include:

- For transfer students, check to see if there is an "AA Degree- Lower Div GEN ED Met" notation. This will simplify the process considerably. If notation is missing but the student has 60+ credits

from a two year school, ask if the Associate of Arts (AA) or Associate of Science (AS) was awarded. The student should speak to Admissions-Evaluations in Griz Central to have the degree posted. Don't confuse an AA or AS degrees with Associate of Applied Science (AAS) degrees. AAS degrees do not satisfy lower-division GERs like AA or AS degrees do.

- Grade check. Did the student earn a C- or better? If the course is in progress, a reminder that C- is the minimum grade is in order.
- Repeatable and non-repeatable courses.
- Credit limits. Although we do not limit the number of Activity courses a student can take, only 4 credits may be applied to the 120 credits needed for graduation. All credit limits are listed in the UM Catalog.
- Count total credits and upper division credits (300-level and above). Calculate how many credits are still needed in each category.

Majors, minors and options are noted on a student's transcript, specializations are not. Talk with students about what they hope to accomplish by having additional credentials. The student may also need to speak with a financial aid specialist about the implications of additional credits or semesters.

## 5. General Education Requirements and the Montana University System Transferable Core

Students attending Montana University System campuses have three options for transferring general education core requirements: (1) complete all lower-division general education requirements for one specific campus, (2) complete the Montana University System Core transferrable general education curriculum (also known as the MUS Transfer Core or the MUS Core), or (3) obtain an A.A. or A.S. transferrable degree.

**\*Eligible transfer students who elect to use the MUS Transfer Core to satisfy UM general education requirements should alert their academic advisor of this decision as soon as possible. See Appendix H for detailed information on the MUS Transfer Core.**

## 6. Graduation Appeals

The Graduation Appeals Committee (GAC) is a standing subcommittee of the Academic Standards and Curriculum Review Committee (ASCRC), which derives its authority from the By-laws of the Faculty Senate.

Section III. 3.c.1 of the Faculty Senate By-laws gives the GAC the authority to "grant exceptions to the faculty rules for graduation, admission, and readmission." Its function is stated as: "Petitions for exceptions to the rules governing admission, graduation, retention, and readmission shall be reviewed and acted upon by the subcommittee.

The Committee primarily deals with University requirements for graduation, including General Education Requirements, academic policies and procedures, minimum credits for graduation, and residency requirements.

The underlying operating assumption of the Graduation Appeals Committee is that the University policy governing the particular issue will be followed unless there are compelling reasons to set it aside. **Students should understand that any petition that is submitted is a request for an exception to requirements that the rest of the student population has to fulfill.** In fairness to students who (sometimes with substantial

inconvenience) fulfill all requirements, exceptions will not be granted for reasons of simple inconvenience, student mistakes, or other weak reasons.

See Appendix J for the Graduation Appeals Form, which details the procedure for filing graduation appeals.

## **Degree Maps**

Degree planning helps students stay on track for graduation. We have developed Degree Maps for all undergraduate, four-year degree programs at UM to serve as resources for students and advisors to help plan out the coursework students need to take for their major and their academic department's recommended sequencing through those major requirements. The Degree Maps are published online at <https://www.umt.edu/oss/degree-maps/>.

Degree planning also ensures that students can take advantage of the various experiential learning and co-curricular opportunities we offer at UM without adding more time to their path to degree completion. Staff in UM's Office of **Experiential Learning and Career Success** are available to help students connect with opportunities such as **internships**, **civic engagement**, and **undergraduate research**, and to ensure students are prepared for post-graduation success. We have added the **ElevateU Career Readiness Guide** to the Degree Maps to incorporate opportunities for developing and honing career readiness skills into students' degree planning.

Please reference the [Degree Maps](#) when working with students to develop graduation plans and use the Degree Works "Plans" tab to create graduation plans.

## **Registration**

### **1. Priority Advising**

Advising numbers are posted in Banner, Cyberbear for Faculty and Advisors, and InfoGriz 3-4 weeks prior to the Priority Registration period. Advising numbers are no longer distributed to academic departments; pins are available in Banner, Cyberbear for Faculty and Advisors, and InfoGriz. During each semester, Priority Advising typically begins the Monday of week 6 of classes. Advising procedures and distribution of advising numbers vary widely among academic departments.

### **2. Priority Registration**

Priority registration is the one-week period during which students can first register for the following fall or spring semester. During each semester, Priority Registration begins the Monday of week 9 of classes. The Priority Registration timetable is set by the Registrar's Office and published on their website (<http://www.umt.edu/registrar/Registration/registrationtimetbl.php>). Points to remember:

- Priority sequence: students with disabilities, graduate students, Post Baccalaureate/Seniors, Four Bear/Athletes/Veterans, Juniors, Sophomores and Freshmen.
- Priority codes (DSSS, ATHL, BEAR, VET) appear in Banner and in CyberBear for Faculty and Advisors under Registration Notices – look for Time Tickets section.
- Credits in progress (exclusive of remedial/developmental credits) are included in the determination of class- year standing.
- Students may register during and after their designated time period.

- Incoming transfer students typically do not begin registration until after the priority period ends, although they may register during the priority period if they can connect with an advisor in their major department.
- Students are eligible to register for up to 21 credits without an advisor's authorization. In order to register for 22 or more credits, a Maximum Credit Override Form signed by the advisor is required. These forms are available at the Registrar's Office. The advisor and student need to be realistic about what can reasonably be accomplished.

### **3. Before the First Instructional Day**

Registration overrides may only override a full or closed course prior to the first day if:

- The Dean of the college or school has made an exception. In most cases, the student will need to join the waitlist for the course as exceptions are RARELY made.
- The course is a 500 or 600 level graduate course.

### **4. First 15 instructional days of the semester**

Students may add a class on CyberBear during the first seven days of the term (see the Registrar's webpage for special info on timelines for Summer and Winter Session); classes may be dropped on CyberBear through the 15<sup>th</sup> class day.

- Mountain Campus students intending to take course(s) on the Missoula College campus (and vice versa) will need to obtain a "College Restriction Override" and garner the appropriate approvals. This also applies to online courses. Additional restrictions apply to Distance Learners.
- The "Registration Override" process is used for Major Restrictions, Class and Level Restrictions, Consent of Instructors and Consent of Honors/Cohort Restrictions until the 15<sup>th</sup> instructional day of the semester.
- Changes to or from "Audit" must be completed by the 15<sup>th</sup> class day.
- Students may not drop their last course online. If a student intends to do a complete withdrawal for the semester, he or she should be directed to <http://umt.edu>

### **5. 16<sup>th</sup> - 45<sup>th</sup> instructional days of the semester**

Courses may be added or the grade change option changed using the paperless "Course Add/Drop/Change" workflow process described in item 7. The instructor and advisor must approve the action. Points to discuss with the advisee before authorizing the change:

- Has the student read the "Policies and Procedures" info on the back of the form, and are there any questions?
- If it is a late add, has the student been attending the class and is it reasonable for the student to be able to complete missed work?
- Courses dropped will result in a grade of "W." If students receive Financial Aid or scholarships, or participate in a program with credit requirements (e.g., Pell Grants, WUE, Veterans Benefits or Vocational Rehabilitation support, NCAA athletes, international students), they should be directed to the relevant office to make sure the drop will not jeopardize their aid or program status.
- How will the registration change alter the student's academic plans? If it is a foundational course for the major, will it affect the anticipated graduation date? If the student plans to retake the course at a later date, are there additional campus resources available to the student?
- Courses dropped after the 15<sup>th</sup> instructional day do not generate a refund. This is especially important for students registered for fewer than 12 credits who may think adding and dropping

the same number of credits will be a financial wash. It will instead result in additional charges for the added course with no associated refund for the dropped course since both courses remain on the transcript.

## 6. After the 45<sup>th</sup> instructional day of the semester

For late adds or grading option changes, see the previous section. To drop a course after the 45<sup>th</sup> day, the student must solicit the approval of his or her college dean (or designee) in addition to that of the instructor and advisor. The course instructor indicates whether the student is passing (WP) or failing (WF) at the time of the withdrawal.

- The last day to drop a class or change grade option is the last day of classes (Friday before Finals Week), unless the instructor has designated an earlier deadline.
- Course changes cannot be processed if the student has one or more registration holds in effect. Students can view their holds in CyberBear (advisors can view them in Cyberbear on the Student Profile page and in Banner on the SOAHOLD screen).
- Could the decision have been made earlier in the semester? If so, this may indicate a broader range of academic issues.
- Similarly to drops initiated between the 15<sup>th</sup> and 45<sup>th</sup> instructional day, students who receive Financial Aid, scholarships, or participate in a program with credit requirements (e.g., Pell Grants, WUE, Veterans Benefits or Vocational Rehabilitation support, NCAA athletes, and International students), should be directed to the relevant office to make sure the drop will not jeopardize their status.
- How will the registration change alter the student's academic plans? If it is a foundational course for the major, will it impact their anticipated graduation date? If the student plans to retake the course at a later date, are there additional campus resources available to the student?

**Any change in registration is an opportunity for a discussion between the advisor and the student.**

A student may apply a maximum of 18 "Cr" credits towards the 120 credits needed for graduation. Some graduate and professional programs view courses taken on a Cr/NCr basis differently from those taken for a traditional letter grade.

## 7. Paperless course add/drop/change workflow instructions

### Overview:

Workflow allows students to collect the required permissions to complete a registration change without using paper forms.

**Step 1: Student submits request to add, drop, or change grade mode/credit level in CyberBear.**

The *Course Add Change Drop* link is located in CyberBear under Student Services (left column or collapsed under “Additional Links” if on a mobile device). It routes to their current term schedule:

**Student Profile -**

Term: Summer Session 2017 ▾

Curriculum and Courses

Prior Education and Testing

Additional Links

Registration

**Course Add Change Drop**

Student Accounts

*Current Registration*

*Click a CRN to Change or Drop a Course*

CRN	Subject	Course	Section	Title	Credits
33307	ANTY	133X	01	Food and Culture	3
30292	MUSI	132L	01	History of Rock & Roll	3
30180	PSYX	100S	03	Intro to Psychology	4
30007	THTR	120A	04	Introduction to Acting I	3
35100	WRIT	201	06	College Writing II	3

Add Course

If adding a new class, use the Add Course button to search. CRNs are clickable to change or drop. The CRN redirects to give the option to drop or change the selected course:

*Choose your action below.*

CRN	Subject	Course	Section	Title	Credits	Grade Option
30180	PSYX	100S	03	Intro to Psychology	4	Traditional

Change Credits/Grade Options   Switch Sections   Drop Course

The next screen displays fillable selections for changes (grade mode & credit load where applicable) and policy affiliated with the chosen action. This includes the route their request will be sent through before the request can be approved and processed.

For a change:

*Course Change Credits/Grade Option*

*If credits or grade option cannot be adjusted, no choices will appear in the dropdown menus below.*

CRN	Subject	Course	Section	Title	Credits	Grade Option
30180	PSYX	100S	03	Intro to Psychology	4 ▾	C - Credit/No Credit ▾

Change Reason

Check the checkboxes below to agree and finish changing course

I understand my request to change this course will be forwarded to the instructor and my assigned academic advisor. Post-baccalaureate and graduate students do not require an academic advisor's approval. Students who receive veteran's benefits, hold certain student visa types, or are NCAA athletes require additional approvals from those advisors.

I have reviewed the policy for changing courses after the 15th instructional day (or equivalent day for summer/wintersession) and understand it is my responsibility to secure all approvals by the deadline. Courses taken to meet general education, major, or minor requirements must be taken for a traditional letter grade. There is no charge to change the grade option. Increasing the number of credits may result in additional tuition and fees. If an increase is approved, the additional credits will be added to my current semester registration and any corresponding tuition and fees will be billed to my account.

Finish Changing Course

For a drop:

*Drop Course*

CRN	Subject	Course	Section	Title	Credits	Grade Option
30180	PSYX	100S	03	Intro to Psychology	4	

**Drop Reason**

Check the checkboxes below to agree and finish dropping course

I understand my request to drop this course will be forwarded to the instructor and my assigned academic advisor. The Dean of my major will also be included if not approved by the 45th instructional day (or equivalent day for summer/winter session). Post-baccalaureate and graduate students do not require an academic advisor's approval. Students who receive veteran's benefits, hold certain student visa types, or are NCAA athletes require additional approvals from those advisors.

I have reviewed the policy for dropping courses after the 15th instructional day ( or equivalent day for summer/winter session) and understand it is my responsibility to secure all approvals by the deadline. If approved before the 45th instructional day, the course status will change to "withdrawn" and a "W" will appear on my transcript. If approved after the 45th instructional day, the course status will change to "withdrawn while passing" or "withdrawn while failing" per the instructor's notation, and a "WP" or "WF" will appear on my transcript. A \$10 late drop fee will be billed to my account for each approved course drop. There is no refund of any tuition or fees for courses dropped at this time. Dropped courses do not affect my GPA, but appear on my transcript and count as attempted credits which can affect future Financial Aid eligibility and VA benefits.

**Step 2: Email is sent to the required signer with a link to the student's request.**

Routing for signatures is automated, based on Banner information and the action (add, drop, or change) requested by the student. The first person notified of a request is always the instructor of record in Banner. Signers are notified one at a time, so if one signer denies or fails to respond to the request, the student's request will not move to the next signer in line. Routing is as follows:

**Add Class & Change Grade Mode or Credits:**

*Instructor of Record*

*Assigned Academic Advisor  
(skips for Post-Bac & Grad Students & skips in summer)*

*Specialty Advisor  
(Veteran benefit recipients, NCAA athletes, or international students w/ certain visas)*

*Office of the Registrar*

**Drop Class:**

*Instructor of Record*

*Assigned Academic Advisor  
(skips for Post-Bac & Grad Students & skips in summer)*

*Specialty Advisor  
(Veteran benefit recipients, NCAA athletes, or international students w/ certain visas)*

*Dean of Declared Major  
(after 45<sup>th</sup> Class Day or equivalent)*

*Office of the Registrar*

**Step 3: Click the link in the email to navigate to the Workflow log-in screen.**

Log in using your netID and password. If you are already logged in to CyberBear, Moodle, etc. it should put you directly into Workflow without prompting for your log-in information.

**Step 4: Click the pending request in your Worklist to start your review of the student's request.**

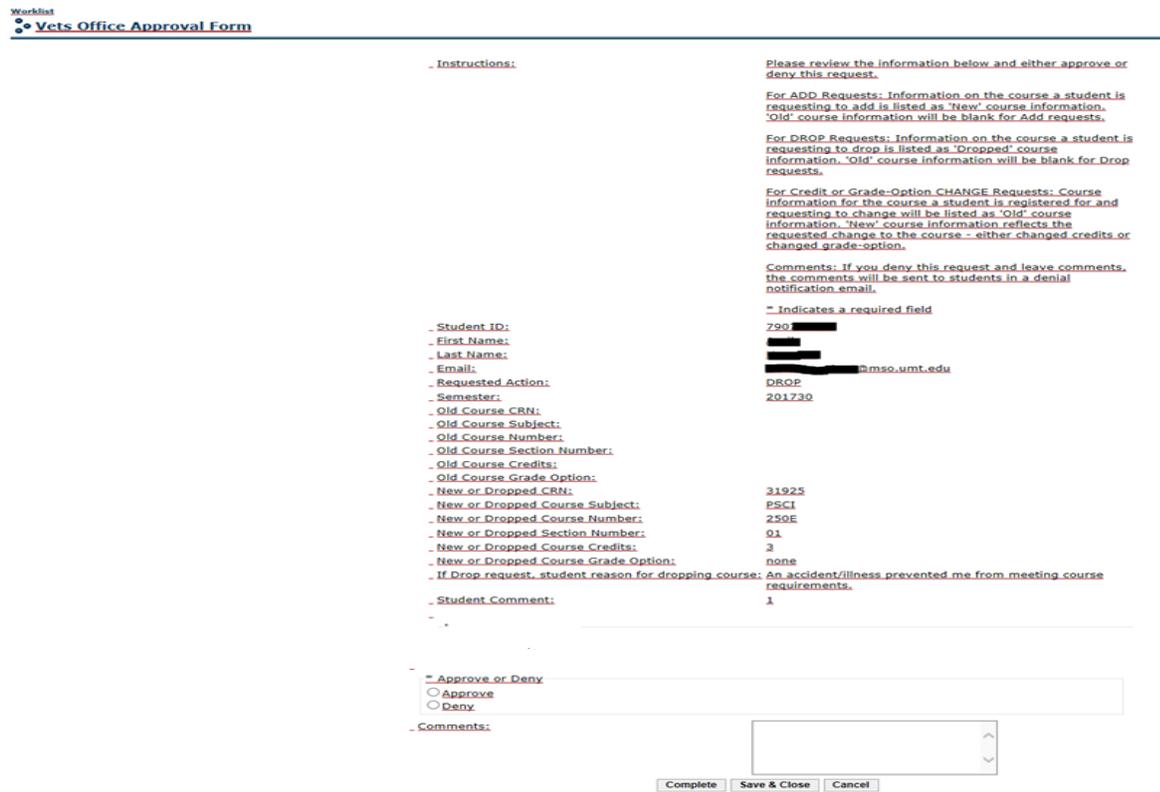
Each request will be labeled "CRSECHG – Student's Name – ACTION".



**Step 5: Review the student's request & approve or deny.**

The student's information will be listed, along with the course information, and any comments submitted by the student. Based on this information, you can approve or deny the request at the bottom. If you deny a student's request, your comments will feed into the denial email to the student and the Workflow ends. If you approve the request, a Workflow email notice is sent to the next signer in line. You may click the Cancel button at the bottom if you need more time or information before approving or denying the request.

Your screen will look similar to this, depending on your role (\*be sure to click "Complete" to finish):



**Step 6: Student receives email once the request is processed by the Registrar's Office or is denied by a signer.**

If you have questions or need help with this process, you may contact the Registrar's Office at (406)243-5600 or [registration@umontana.edu](mailto:registration@umontana.edu).

## 8. Waitlists

Prior to the first day of classes, students attempting to register for a closed section of a course will have the option of adding themselves to a waitlist through CyberBear. If a space becomes available, the first student on the waitlist will be notified via university email. The student has 72 hours to register for the course before the space is offered to the next student on the list. Key points for advisors:

- Encourage student to have a solid back-up plan in place in case a space does not become available. It should not be a random "space-filler."
- Waitlisted courses are not included in a student's registration. Students on one or more waitlists should register for an alternative course if they need to maintain a minimum number of credits for program eligibility.
- Students who do not meet the eligibility criteria for a course (pre-requisite, college or major restriction) may not add themselves to a waitlist.
- Students on a waitlist should attend class on the first day and bring a Registration Override form.
- If there are multiple sections of the course, check the waitlist (SFAWLPR form in Banner) for each. Often the first section listed will have a long list, but later sections will only have one or two students
- Additional information is available on the Registrar's Office website at <http://www.umt.edu/registrar/waitlisting.php>.
- An override form, even with the instructor's signature, will not bypass a waitlist until the first instructional day.

\*Students will be able to see their position on the waitlist for a course in their Registration within CyberBear. Students' Waitlist Position can be found in the **Register for Classes** section on the *bottom left* under the **Schedule Details** tab within the Message line.

Example:

**Message:** Wait List | **Hours:** 0 | **Level:** Undergraduate | **Campus:** UM-Msla | **Schedule Type:** Lab | **Grade Mode:** Credit/No Credit | **Waitlist Position:** 1 | **Notification Expires:** None

The screenshot shows the Banner system interface. At the top, there are two tabs: "Schedule" and "Schedule Details". Below the tabs, the text "Class Schedule for Spring Semester 2019" is displayed. A dropdown menu is open, showing "Fund Women's Weight Training | Activities 111 Section 01 | Class Begin: 01/10/2019 | Class End: 05/03/2019" with a green "Waitlisted" label. Below this, the course details are shown: "01/10/2019 -- 05/03/2019" with a calendar icon, "09:00 AM - 09:50 AM Location: UM-Msla Building: Fitness and Recreation Center Room: WRM", and "Instructor: Riley, Christopher (Primary) CRN: 30026". At the bottom, a message line is displayed: "Message: Wait List | Hours: 0 | Level: Undergraduate | Campus: UM-Msla | Schedule Type: Lab | Grade Mode: Credit/No Credit | Waitlist Position: 1 | Notification Expires: None". The "Waitlist" label and "Position: 1" are highlighted with red boxes.

## 9. Prerequisites

Many courses require successful completion of one or more foundational courses or prerequisites. CyberBear will allow students to register for a course if they have completed or are actively enrolled in the prerequisite. If a student withdraws, fails or does not earn the minimum required grade in the prereq, he or she will be dropped for the more advanced course. There are certain cases in which a student has the needed coursework, but it is not reflected on the transcript. In these situations, the student will need to obtain a prerequisite waiver from the instructor, to be entered into Cyberbear. Before recommending the student pursue the waiver, review:

- How has the student demonstrated the necessary knowledge base? He or she may need to document this to receive a waiver.
- Transfer credits, particularly if the student started before Common Course Numbering took effect, often have the most prereq issues. Encourage the student to bring a copy of an unofficial transcript (or the grade report for the prior school if the credits are not yet posted to the UM transcript) when speaking with the department or instructor.

Additional information is available at <http://www.umt.edu/prereq>.

## 10. Major Changes

After their initial matriculation to UM, students change majors by way of the Change of Major Form (see Appendix K). Students can obtain a Change of Major form from either the Registrar's Office in the Lommasson Center or the Undergraduate Advising Center in Lommasson Center room 269. Students should fill out the appropriate information as indicated on the Change of Major form, and then get the required signatures from departmental representatives of the major they are declaring **AND** from the major they are changing out of. Once required signatures are on the form, students should return the form to the Registrar's Office or leave the completed form in the drop box outside Griz Central.

## 11. Withdrawal

See <http://umt.edu/withdrawal> for detailed information and guidance on withdrawals.

In many cases, a student can salvage at least a portion of his or her coursework for a semester instead of a complete withdrawal. Could individual courses be dropped and/or grade options changed in one or more courses? Are there campus resources available such as tutoring that could provide the extra support necessary for a student to be successful? Withdrawal should be viewed as a last resort option in all cases.

If a student intends to do a complete withdrawal for the semester, he or she should be directed to the Withdrawal Coordinator (406-243-5593, [withdrawal@mso.umt.edu](mailto:withdrawal@mso.umt.edu)). For more information, see the Semester Withdrawal Form (see Appendix L).

Hardship Withdrawals, Medical Withdrawals, and Retroactive Withdrawals are all important options for students with appropriate situations. For more information on these processes, contact the Withdrawal Coordinator at the information noted above.

## **12. Change of Status (Distance Education/Fully Online Student)**

Students who intend to enroll only in online courses may opt to change their student status to "Distance" by visiting [https://umonline.umt.edu/distance\\_form.php](https://umonline.umt.edu/distance_form.php). Doing so may result in reduced tuition and fees. This will waive the requirement to submit an immunization form before being registering for classes. It is very important to note that Distance students are not eligible for The University of Montana Health Insurance, Curry Health Center services, ASUM services, discounted tickets for athletic events or access to Campus Recreation services and cannot live in campus housing. Distance students are not eligible to take on-campus courses.

### **Academic Standing**

Academic standing is based on a student's cumulative, UM institutional grade point average, exclusive of transfer work.

#### **1. Good Standing and Dean's List**

A student's cumulative GPA is at 2.00 or higher.

- Dean's List distinction is awarded when the term GPA is 3.5 or greater in at least 9 credits with no grades of C+, C, C-, D+, D, D-, F, NC or NCR.
- Grade changes after "grade roll" do not alter a student's academic standing.
- Academic standing is not retroactively changed when the GPA is recalculated following a course repeat.

#### **2. Academic Probation**

A student's cumulative grade point average is below a 2.00. Once on probation, the student must maintain a semester GPA of 2.00 or higher to avoid academic suspension. Topics to discuss with the probation student:

- What do they view as the primary reasons for their unsatisfactory performance?
- Are there any campus resources they need to utilize to be successful?
- Are they in the right major (or do they need additional skill development to be successful in that major)?
- What are the repercussions (financial and academic) of continued low performance?

#### **3. Academic Suspension**

No student is suspended after a single semester of bad grades, nor does one grade ever cause a student to be suspended. If a student has otherwise performed well, that one bad grade won't have dire consequences. A student is suspended if, after a semester of probation, he or she fails to achieve a semester grade point average of 2.00 or higher. The student will be eligible to apply for reinstatement following one semester away from UM.

- Academic suspension is not synonymous with Financial Aid Suspension, although they sometimes go hand-in-hand.

- Encourage the student to consider how to use the time away from school to succeed when they return.
- Students may not attend another MUS institution while on Suspension.
- Summer, autumn and spring are considered “semesters.” A student suspended after the spring semester can sit out the summer and apply for fall reinstatement.

#### **4. Appeal of Suspension**

A student has the option to appeal a suspension and return to the university without sitting out a semester. Appeals are considered where the student has otherwise demonstrated an ability to succeed at the university and the *compelling* circumstances that led to the poor performance have been resolved. See Appendix M for the Appeal of Suspension Form, which details eligibility criteria and appropriate procedures.

#### **5. Academic Reinstatement**

Students typically apply for reinstatement to the college or school of their last semester of attendance, although in some cases they will apply to the college or school they intend to pursue coursework in after they are reinstated. Students will work with a reinstatement coordinator to develop a reasonable plan for getting back into good academic standing. The student may be subject to course restrictions. See Appendix N for the Academic Reinstatement Plan form, and see <https://www.umt.edu/registrar/students/academicsuspension.php> for reinstatement contacts and procedures on the Mountain Campus and at Missoula College.

#### **6. Academic Forgiveness**

Academic Forgiveness was developed for students who had one or more poor semesters of academic work, left the university for 3 or more years, and demonstrated their ability to be successful upon their return.

- Student must have completed 30 degree credits with a GPA of 2.5 or higher to apply for Academic Forgiveness.
- Whole semesters are affected; students cannot select individual grades within a prior semester to remove from grade point average.
- Grades remain on transcript with an “E” prefix to exclude the grade from the GPA.
- Academic Forgiveness is marked on the transcript as indicated below.
- See Appendix O for the Request for Academic Forgiveness Form, which includes additional information.



- Repeated drops or grade option conversions, especially in foundational courses for a major.
- Consistent pattern of dropping one or two courses each semester.
- Pattern of avoidance of coursework in an area (most frequently either math or writing).
- Low ratio of credits completed relative to attempted credits.
- Change of major after 60 or more attempted credits.

## **Advisor's Toolkit**

This section provides an overview of various tools available to advisors. Although technology has dramatically changed the face of academic advising and is increasingly improving students' ability to self-serve, it is not a substitute for traditional face-to-face sessions with a student.

### **1. UM Catalog**

The UM Catalog (<http://umt.edu/catalog>) is the academic roadmap for students and advisors. There are various ways to navigate the catalog. It is strongly encouraged that advisors attend an "Advisor Toolkit" training to learn how to effectively utilize the catalog and other advising tools. To access prior year catalogs, go to <http://umt.edu/catalogs> and select the catalog year you are looking for. If you need information from a catalog that pre-dates those available on the website, contact the Registrar's Office.

### **2. Banner for Advisors**

A few of the most frequently used Banner forms are:

**SGASTDN** (formerly UGASTDN in Banner 8)- This is the general student information form. It includes major, class status, residency, admission codes and matriculation term.

- 1- Learner: admit type, class standing, fee structure, major (scroll down under "General Learner" block to see if student switched status or program).
- 2- Veteran: indicates if student was certified for veterans benefits (may limit options for Cr/NCr or dropping a class).
- 3- Academic and Graduation Status- academic standing (Good, Probation, Suspended, Suspended and Reinstated), provisional admit (3 semesters, 24 degree credits, 2.00 GPA).
- 4- Miscellaneous: Orientation codes
- 5- Activities: student affiliation with various student support programs and services (TRIO Student Support Services, Veteran's Education and Transition Services, etc.).

**SHATERM**- This gives you a semester by semester screen shot of coursework and grades. Enter "01" for Course Level Codes and blank out the term date on top to view all terms of attendance.

- 1- Current Standing: Provides first/last dates of attendance, academic standing, and Institution, Transfer, and Overall GPAs.
- 2- Term GPA and Course Detail Information: Transfer work will appear first, with one screen per institution.
- 3- Advanced Placement credits appear next. Note that the \* after "CR" means the credits can meet General Education Requirements.

**SOAHOLD**- This form contains any holds on a student's record. Check effective date ("from") and release ("to") date. Hold information can also be found in the Student Profile in Cyberbear.

**SHACRSE**- This gives a complete listing of courses taken by the student. It does not show courses in progress, transfer, or AP credits. Clear "Term" to view all completed semesters or enter specific semester.

**SFAREGQ** (formerly UFAREGQ in Banner 8) - This form will show you a student's registration for a semester. It lists the classes, instructors, grading mode and days/times of the week.

**SHARQTC** (formerly UHARQTC in Banner 8) - This is the form used to print unofficial student transcripts. You must first select the correct destination printer on the SOADEST form that automatically appears when you initially go to SHARQTC and click on the 'X' in the upper left-hand corner of the SOADEST form. Click Insert or press F6 to start a new transcript request. The Request Date defaults to the current date. Required fields for **Transcript Request** tab:

- Level AL
- Transcript Type WEB
- Number of Copies 1

If you do not have access to print unofficial transcripts and would like to request access for your department, contact the UM Registrar.

**SFAREGS**- This is the form used to see a student's course registration. You can see the student's schedule for a specific semester and whether or not they have finalized their registration bill.

**SSASECT**- This provides section and term-specific information on courses. "Grade Mode" indicates whether a course can be taken for a traditional letter grade only ("T"), for Credit/No Credit ("C"), or either (blank).

**SPAAPIN** - This form shows the student's advising PIN. The number can also be found in the list of Registration Notices in the upper right-hand corner of the advisee's Student Profile page in CyberBear for Faculty and Advisors. Occasionally you'll have a student report that the PIN comes up with an invalid message. Check SPAAPIN to make sure you have the correct semester's PIN.

**SPAIDEN**- This form provides contact information for the student, including phone numbers and alternate email addresses.

**SPACMNT**- Indicates if a student has signed a release form with the Registrar's Office or Business Services. The first comment to appear typically refers to tax form preferences; use the scroll bar on the right to see additional comments. The comment will list the name and relationship to student of anyone authorized to discuss the student's records.

**SFASRPO**- Pre-requisite overrides can be entered using this form (access is granted on a case-by-case basis to individuals with the authority for overrides into courses in their department).

**SFASLST**- View the roster for a current class (view grades).

**SFARHST**- Lists a student's registration history, including grades. Grades shown are pre-grade roll (good way to check on academic status inconsistencies).

**SFAWLPR** - Enter the CRN for a course to view the Waitlist for that section of the course. **SFIWLNT**- This form shows the record of email notifications for the waitlist for a given CRN. The third tab will show you the location of the high school.

\*See Waitlist information in previous Registration section for detailed information on how students can view their position on course waitlists.

**SOAHSCH**- This form shows the student's high school graduation (or GED) date, grade point average, class size and standing.

**SHATRNS** (formerly UHATRNS in Banner 8) - Click "Transfer Institution Number" to view a list of the institutions previously attended by a student.

**SHADEGR**- This form allows you to view the UM degree(s) awarded.

**GUAPMNU**- This will allow you to develop a personalized Banner menu. You can access the forms you need by a double click instead of typing in the name each time.

### 3. Degree Works

Degree Works is a web-based tool made available Fall 2016 for students and advisors to monitor students' academic progress toward degree completion. Available through CyberBear, Degree Works reviews past, current, and planned coursework and provides information on completed and outstanding requirements necessary for degree completion.

Degree Works also allows students and their advisors to plan future academic coursework through the degree planning tool described in the next section.

Advisors should be aware that degree requirements are scribed in Degree Works beginning with the 2014/2015 catalog year and for all catalog years after that.

A KPCN tutorial video for students on how to use Degree Works is available at [https://www.youtube.com/watch?v=4x\\_OASFTcqc](https://www.youtube.com/watch?v=4x_OASFTcqc). This video is also very useful for advisors.

\*\*If students or advisors encounter problems or issues with Degree Works, this information should be reported to the Registrar's Office through the Degree Works issue reporting form available at <http://www.umt.edu/registrar/DegreeWorksIssueReporting.php>.

#### **4. Degree Plans within Degree Works**

The Plans tab within Degree Works is a degree planning tool which also provides online advising notes. With locked plans, automated tracking is available to indicate whether a student is on-track or off-track with their degree requirements. Multiple views allow for quick assessment of what requirements are needed for graduation and a summarized view of all advising notes and advising checklist items.

**Please encourage your advisees to take advantage of the Plans tab in Degree Works and prioritize developing and “locking” degree plans with students during advising appointments.**

#### **5. InfoGriz**

InfoGriz is a web application developed by Enterprise Information Systems (EIS) to provide custom Banner reporting capabilities to departments. InfoGriz empowers individuals and departments on campus to pull custom reports out of Banner (i.e. List of Students in Academic Difficulty, List of Students by Major, Degree Candidates, etc.) without having to rely on programmers for information. For academic advisors, reports usually focus on student data. Reports provided can be printed in the designed view or can be exported to Excel.

In order to access InfoGriz, advisors must go through training and be granted an account. For more information, contact Brenda Avery in the Registrar’s Office at [brenda.avery@mso.umt.edu](mailto:brenda.avery@mso.umt.edu).

#### **6. Advising Listserv**

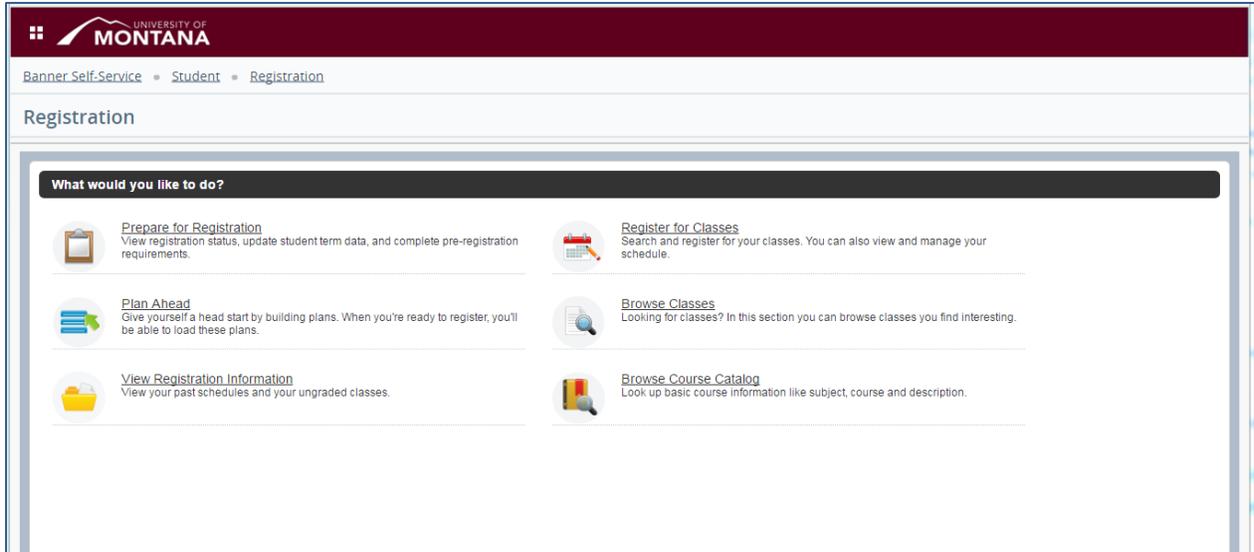
The primary function of this listserv is to distribute information to academic advisors and their campus partners regarding course availability, policy changes, registration information, pertinent events and professional development opportunities. To receive these emails, please contact Brian French at [brian.french@mso.umt.edu](mailto:brian.french@mso.umt.edu).

#### **7. CyberBear Student and Advisor Profiles**

The Student and Advisor Profiles in CyberBear provide a quick and easy academic snapshot and entry way into Degree Works and other online systems. Online advising notes can be entered here, but Navigate is the preferred platform for advising appointment documentation. Information on registration-preventing holds, advising pins, and academic transcripts are available through the CyberBear Student and Advisor profiles.

## 8. CyberBear Registration Module

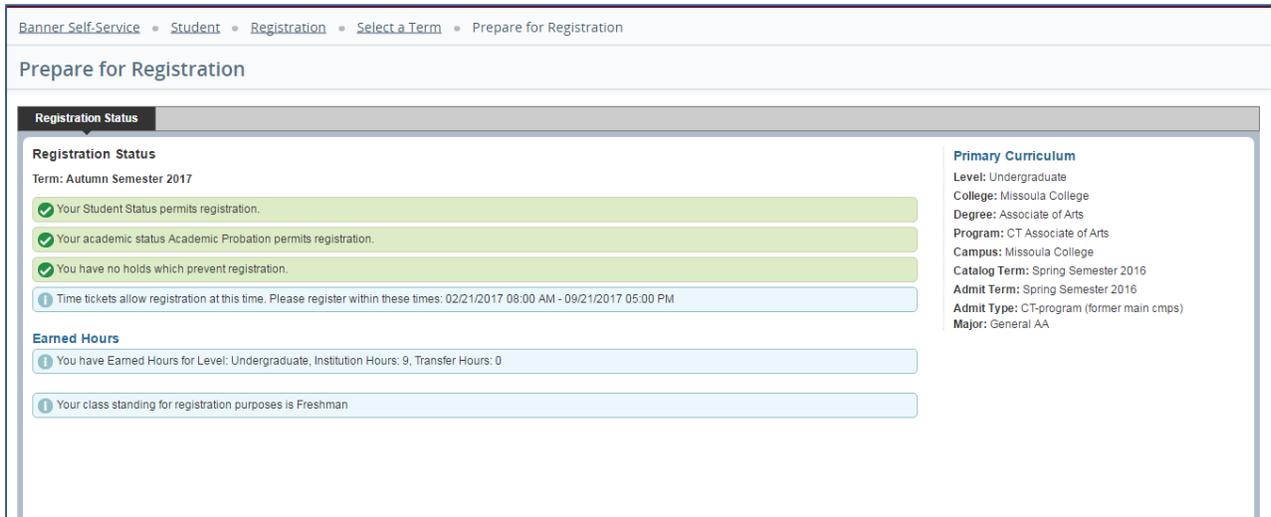
The CyberBear Registration Module is organized functionally and puts student registration workflow in a logical order:



The screenshot shows the University of Montana Banner Self-Service portal. The breadcrumb trail is: Banner Self-Service > Student > Registration. The main heading is "Registration". Below this is a section titled "What would you like to do?" with six options:

- Prepare for Registration**: View registration status, update student term data, and complete pre-registration requirements.
- Register for Classes**: Search and register for your classes. You can also view and manage your schedule.
- Plan Ahead**: Give yourself a head start by building plans. When you're ready to register, you'll be able to load these plans.
- Browse Classes**: Looking for classes? In this section you can browse classes you find interesting.
- View Registration Information**: View your past schedules and your ungraded classes.
- Browse Course Catalog**: Look up basic course information like subject, course and description.

The **Prepare for Registration** feature gives the student information, alerts, and tasks they need to do to make sure they are ready to register when their priority registration timeslot opens.



The screenshot shows the "Prepare for Registration" page. The breadcrumb trail is: Banner Self-Service > Student > Registration > Select a Term > Prepare for Registration. The main heading is "Prepare for Registration". Below this is a section titled "Registration Status".

**Registration Status**  
Term: Autumn Semester 2017

- ✓ Your Student Status permits registration.
- ✓ Your academic status Academic Probation permits registration.
- ✓ You have no holds which prevent registration.
- ⓘ Time tickets allow registration at this time. Please register within these times: 02/21/2017 08:00 AM - 09/21/2017 05:00 PM

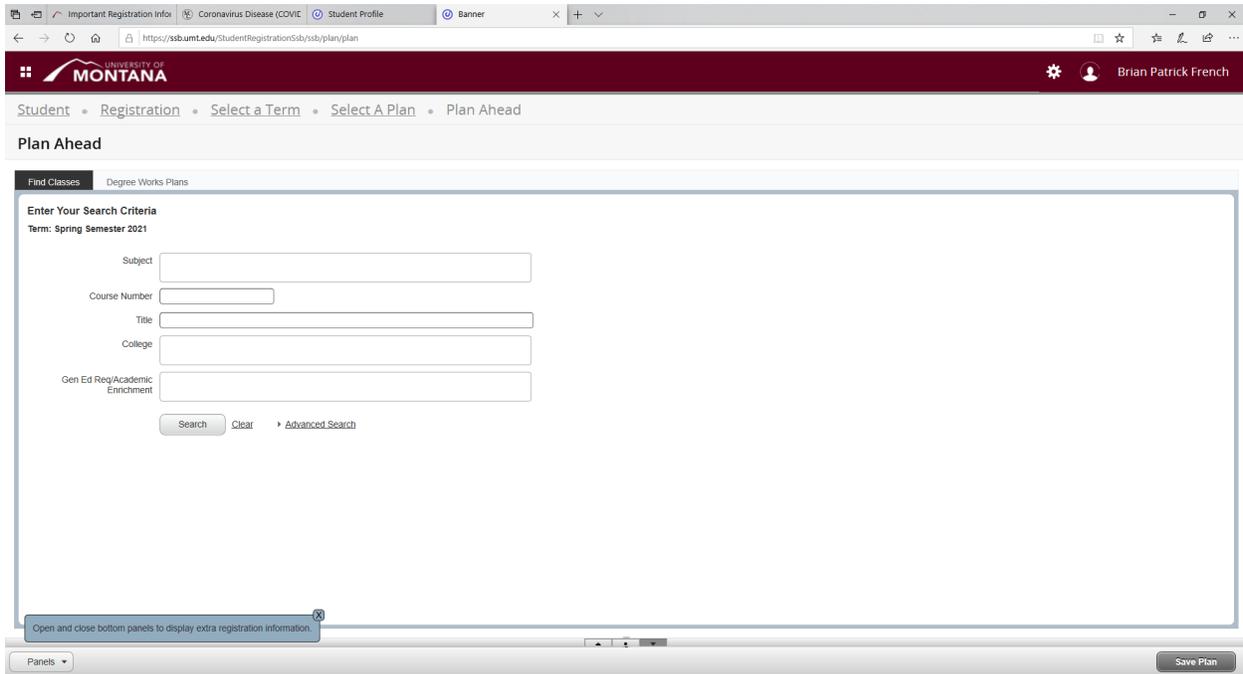
**Earned Hours**

- ⓘ You have Earned Hours for Level: Undergraduate, Institution Hours: 9, Transfer Hours: 0
- ⓘ Your class standing for registration purposes is Freshman

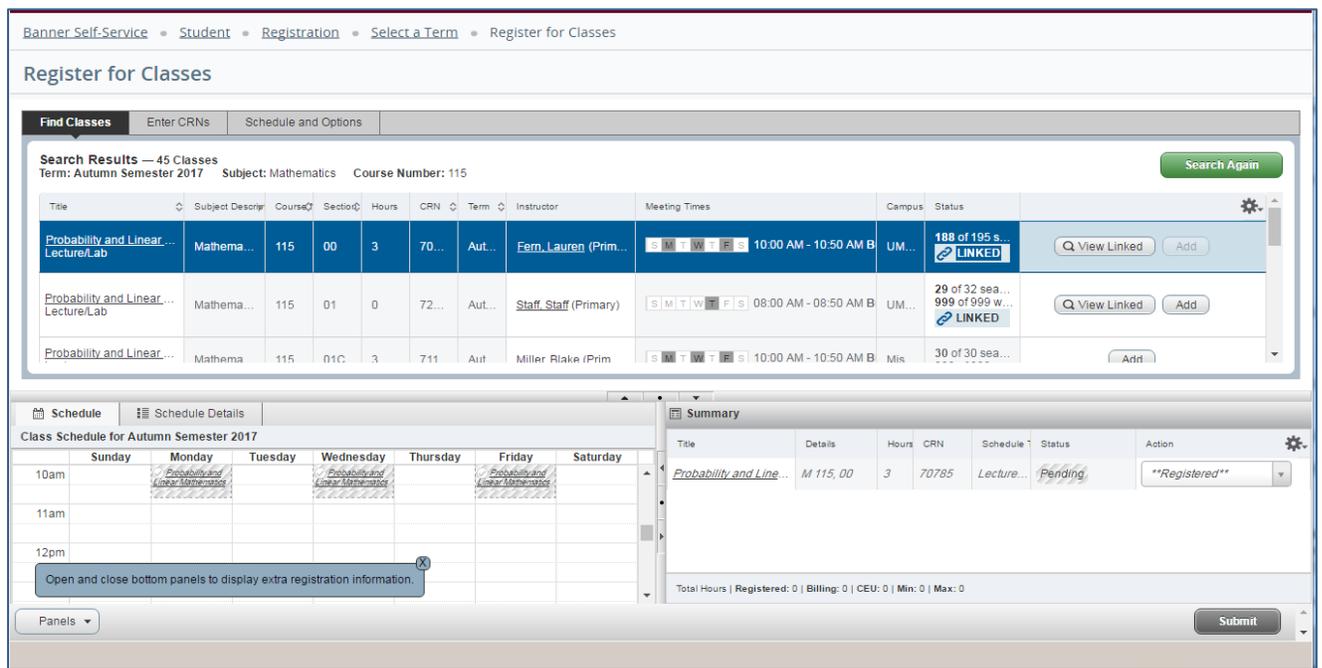
**Primary Curriculum**

- Level: Undergraduate
- College: Missoula College
- Degree: Associate of Arts
- Program: CT Associate of Arts
- Campus: Missoula College
- Catalog Term: Spring Semester 2016
- Admit Term: Spring Semester 2016
- Admit Type: CT-program (former main cmps)
- Major: General AA

The **Plan Ahead** feature gives students and advisors the ability to build a registration schedule in advance. Students and advisors can build a semester-specific plan for registration from scratch or load the semester from their degree plan in Degree Works.



The **Register for Classes** feature provides students with a collapsible worksheet to search and schedule courses. As courses are added to the worksheet, there is a single button to then submit their registration.



## **Academic Advising Certificate Program (Advising Trainings)**

The Office for Student Success, in collaboration with campus partners, offers the Academic Advising Certificate Program to ensure the consistency and high quality of academic advising at UM and to provide professional development opportunities for individuals interested in academic advising. Through the training program, participants learn about historical and theoretical foundations of advising, different approaches or strategies of academic advising today, UM-specific policies and procedures relevant to advising, various tools available to UM advisors, and support services and resources available to UM students. In addition, participants will have the opportunity to learn about specialized advising services for various diverse communities of students and other topics relevant to advising.

These trainings provide great introductions to advising for faculty or staff members who do official or unofficial advising on a daily basis in their positions and need a refresher. The trainings are also useful for those who are interested in advancing into a professional academic advising position at UM or elsewhere. During the 2020/2021 academic year, we plan to create a Moodle module to house online trainings. We will create online modules for as many of the advising trainings as possible.

Additional information on the Academic Advising Certificate Program, including learning objectives for each individual training and the current training schedule, is available at [http://umt.edu/oss/for\\_faculty\\_staff/academic\\_advising\\_certificate.php](http://umt.edu/oss/for_faculty_staff/academic_advising_certificate.php)

## **University of Montana Academic Advising Council (UMAAC)**

The UMAAC mission is to enhance student retention, persistence, and graduation at UM by promoting a common and productive advising experience for all undergraduate students, as well as by developing data-informed recommendations on institutional advising policies and procedures and departmental advising delivery models.

### UMAAC Goals:

- To regularly assess the effectiveness of academic advising at UM, identify and address campus-wide advising concerns, review policies and procedures relevant to advising, and recommend improvements as appropriate
- To serve as an advisory group to UM Administration and College/School leadership to promote the improvement of campus advising services
- To share and promote advising best practices on campus
- To enhance and promote advisor training, professional development, and recognition initiatives

UMAAC membership: Representatives from all UM Colleges and Schools with undergraduate programs of study and UM's specialized advising units (Athletic Academic Services, Davidson Honors College, Experiential Learning and Career Success, Franke Global Leadership Initiative, Montana 10, TRIO Student Support Services, and Undergraduate Advising Center) serve on the UMAAC. The Executive Director of the Office for Student Success serves as UMAAC Chair.

## Tutoring Resources for Students

For comprehensive information on campus tutoring options, visit [umt.edu/tutoring](http://umt.edu/tutoring).



The Writing and Public Speaking Center **works with all students** as they write papers or prepare presentations **in any discipline**, with no additional cost. We help students interpret assignments, generate and organize ideas, edit prose, synthesize and integrate research, develop timed writing strategies, and deliver presentations.

Visit [umt.edu/writingcenter](http://umt.edu/writingcenter) or stop by Lommasson 271 to make an appointment.



### Math Tutoring

Free, drop-in math tutoring for any student taking developmental and 100-level math courses including STAT 216: Intro to Statistics.

For the most up-to-date schedules and information, visit [umt.edu/mlc](http://umt.edu/mlc).



EdReady Montana provides a free online assessment for participating students to gauge their readiness for college-level math coursework and to refresh their math skills through online tutorials customized for their specific math pathway. Lauren Fern, EdReady Montana Coordinator and math instructor at UM, provides direct assistance to students as they work through their customized tutorial. Successful completion of EdReady often negates the need for participating students to enroll in developmental coursework or take a math placement exam. This saves students time and tuition and fee expenses.

To learn more about EdReady Montana and to sign up, visit [umt.edu/edready](http://umt.edu/edready).



**Free drop-in group tutoring during the semester. Visit [umt.edu/study-jam](http://umt.edu/study-jam) for an updated schedule and a full list of courses supported.**

Accounting 201, 202; Biology 101N, 160N, 170N, 260; Biochemistry 110; Microbiology 250; Business Finance 322; Business Management Information Systems 270, 365, 372 & 373; Chemistry 104, 121N, 123N, 141N & 143N, 221; Computer Science (100 and 200-level courses); French 101, 102, 201, 202; Music Theory 105, 106, 205, 206; Spanish 101, 102, 201, 202; Statistics 216; Physics 205N, 207N, 215N & 217N.

## Financial Matters

The days when academic advisors could simply refer all financial concerns to other offices are long gone. Habitually dropping courses, changing majors multiple times and after accumulating a significant number of credits, registering for classes but never attending them are all actions with the potential to cause financial issues for students.

### 1. Financial Aid

Some of the most common issues students face:

- Max Credit Appeals- Students are limited to funding for 150 percent of the number of credits required for the degree. If the degree requires 120 credits, the student can receive funding for only 180 attempted credits, exclusive of developmental courses. This includes withdrawn and failed coursework. A good rule of thumb is to calculate how many credits the student still needs (including GERs, major requirements, Upper Division credits and general electives), then subtract that sum from the maximum allowed. Is it mathematically possible for the student to complete the desired major(s)/minor(s)? The form is available at <http://www.umt.edu/finaid/documents/MaxCrBAform.pdf>
- Loan caps- Both subsidized and unsubsidized loans have life-time caps or ceilings. If students continually take out the maximum aid without taking a full course load, they may run into the caps before completing their degree.
- "Unearned aid"- In order to have "earned" the Federal Financial Aid a student receives, he or she must attend classes at least 60% of the way through the semester. If a student withdraws before the 60% date, the university is responsible for return of the unearned aid to the federal government. The student then owes the university this amount. Nonattendance in courses can also result in a financial penalty.
- Failure to meet Satisfactory Academic Progress (SAP) - Any student who fails to maintain a 2.00 overall grade point average and a 70% completion rate is placed on Financial Aid Warning. If the student does not move above the two figures in the following semester, the student is placed on Financial Aid Suspension. Being academically reinstated does not mean their financial aid will be reinstated. The student will need to submit an appeal to the Financial Aid Office.
- Additional forms are available on the Financial Aid website (<http://www.umt.edu/finaid/forms.php>).

#### Red flags to look for:

Large numbers of credits earned prior to matriculation at UM (transfer work, AP/CLEP credits)  
Pattern of changing majors after accumulating a significant number of credits towards the last major  
Frequent withdrawals or a pattern of failing and then repeating classes (low credit attempt to complete ratio)  
Pattern of credit overloads each semester

**Advisors are not Financial Aid counselors.** If we see one or more red flags, however, it is important for us to work out a reasonable plan and timeline for degree completion, and then connect the student to

the appropriate resources. **Always refer students to the Financial Aid Office for official information and guidance on financial aid-related issues.**

## **2. UM Financial Education Program**

The UM Financial Education Program is dedicated to empowering the UM community to make informed financial choices and take action to improve their present and long-term financial well-being. This includes helping students who attend the UM Mountain Campus, Missoula College and Bitterroot College increase their financial knowledge through workshops and one-on-one counseling sessions. Program representatives work with students to increase their understanding of credit, budgeting, savings, student loans and loan repayment. Although the Financial Education Program does not offer financial aid, it can help students in a variety of ways, including but not limited to:

- understanding their FAFSA and *Student Aid Report* (SAR),
- understanding the differences between grants and loans,
- understanding repayment of loans and the interest they will accrue,
- learning how to construct a budget for personal finances, and
- learning how to manage debt and strengthen credit scores

All students who express an interest in these or similar topics should be referred to the Financial Education Program in the Office for Student Success (Lommasson 269, 243-6016, [FinancialEducation@mso.umt.edu](mailto:FinancialEducation@mso.umt.edu)). Students who have “low credits attempted” to “credits earned” ratios should also be referred. The Financial Education Program’s goal is to help students be financially prepared for their college experiences as well as life after graduation.

## **3. Scholarships**

The UM Scholarship Application software, Academic Works, is available to all current and continuing UM students and offers one centralized general application, regardless of a student’s major or program of study. This application replaces the “General University Scholarship Program,” as well as many individual departmental, school and college administered programs. New students are automatically considered for scholarships based on their admissions applications.

Students sign in to Academic Works using their Net ID and password at:

[https://umt.academicworks.com/users/sign\\_in](https://umt.academicworks.com/users/sign_in)

Opening and closing dates vary by department. To learn more about specific scholarship opportunities in each major, students should login to the database and complete the general application and/or contact their degree program office.

UM Scholarship website: [www.umt.edu/scholarships](http://www.umt.edu/scholarships)

High achieving students may be on track to apply for one or more external scholarships. These options typically have a complicated application process, so students should be directed to the Davidson Honors College as early as possible.

Scholarships are typically awarded on the basis of demonstrated academic merit.

Eligibility criteria vary widely. Encourage your students to check with their scholarship administrator before making significant changes to their registration.

#### **4. Advising Students utilizing Veterans Affairs (VA) Education Benefits**

Not all veterans receive VA benefits; not all students receiving VA benefits are veterans. If a student is utilizing VA benefits, however, there are a few points critical to remember:

- All courses taken by students using VA benefits must meet GER or Major requirements to be covered.
- For course repeats, advisor must contact VETS Office to make sure that the repeated courses can be covered by the VA.
- Students must submit a Notification of Intent form (NIF) after registering for courses to certify VA benefits. **Students must submit the NIF every semester of attendance.** The NIF - weblink can be found at: <http://umt.edu/veterans>
- Students cannot take activity (ACT) courses under 12 credits (full-time) and have them be paid for by the VA. If students want to take activity courses, they must take them above 12 credits and pay the associated fees out of pocket.
- Students must take courses using the Traditional grade option. Only courses that meet GER/Major requirements only offered as credit/no credit will be covered by VA education benefits.

For any additional questions or inquiries regarding advising students utilizing VA Education benefits, please contact:

**VETS Office** Phone: (406) 243-2744, Email: [vetsoffice@umontana.edu](mailto:vetsoffice@umontana.edu), or

**Nathan Domitrovich**, Undergraduate Advising Center Director, Phone: (406) 243-2851, Email: [Nathan.domitrovich@mso.umt.edu](mailto:Nathan.domitrovich@mso.umt.edu)

#### **Editorial Feedback**

Please send all editorial feedback to **Brian French**, Office for Student Success Executive Director, Phone: (406) 243-2565, Email: [brian.french@umontana.edu](mailto:brian.french@umontana.edu).

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## Appendix A

### ACADEMIC ADVISING PROGRAMS CAS Contextual Statement

Academic advising is an essential contributor to the success and persistence of postsecondary students (Klepfer & Hull, 2012; Kot, 2014; O'Banion, 2016). While the organization and delivery of academic advising reflects an institution's culture, values, and practices (Habley, 1997), academic advisors translate and directly influence personal, institutional, and societal success through their practice. Specifically, academic advisors "work with students to enable them to be confident and assertive in their own abilities to learn, generate, and apply new knowledge and to empower them to embrace their own knowing, learning, thinking, and decision making" (White, 2015, p. 272). In this regard, advisors help students "become members of their higher education community, think critically about their roles and responsibilities as students, and prepare to be educated citizens of a democratic society and a global community" (NACADA, 2006, Preamble, para. 7) and "teach students how to make the most of their college experience" (Miller, 2012, para. 1). As higher education curricula grow increasingly complex and constituents demand accountability, stakeholders feel the pressure to make students' academic experience as meaningful as possible. Academic advising professionals must be ready to meet these challenges and embrace advising as an integral part of an institution's educational mission and equal to instruction (White, 2015).

The role and function of academic advising mirrors the growth and changes in higher education (Cook, 2009; Thelin & Hirschy, 2009). In the 1870s, electives introduced in the academic curriculum meant advisors needed "to guide students in the successful pursuit of their chosen paths" (Kuhn, 2008, p. 5). The 1970s ushered in a new era for academic advising with O'Banion and Crookston's (1972, 1994, 2009) articles advocating a developmental academic advising approach. As the colleges and universities grew in student enrollment and academic offerings, it was clear that there was a need for professional staff members to complement faculty and share certain responsibilities, such as academic advising, to support students as they achieved their short and long-term goals (Combs & Gerda, 2016). Today, higher education recognizes more than a dozen relational styles of academic advising (Drake, Jordan, & Miller, 2013). Each approach encourages primary-role, faculty, and peer advisors to help students delineate their academic, career, and life goals and craft the educational plans necessary to complete their postsecondary objectives. These approaches are often customized to meet the diverse needs of today's college student (Drake et al., 2013).

In 1977, the National Academic Advising Association (NACADA) was formed to provide direction and purpose for practicing academic advisors (Grites & Gordon, 2009). Today, NACADA flourishes with more than 13,000 members in over 40 countries. The NACADA *Statement of Core Values* (NACADA, 2017b) offers the ethical principles that guide advising practice. Along with the NACADA *Concept of Academic Advising* (NACADA, 2006), the NACADA *Academic Advising Core Competencies* (2017a), and the CAS Standards, the Core Values serve as a framework all academic advisors can use to examine their professional practice. As advisors examine their practice, the NACADA Core Competencies identify the breadth and depth of this role in facilitating student success. Based on the Core Competencies advisors should understand theories that support student learning, comprehend foundational information that is necessary to guide students as they achieve goals, and develop skills necessary for building productive relationships (NACADA, 2017a). Information on the NACADA resources, programs, and services can be found at [www.nacada.ksu.edu](http://www.nacada.ksu.edu).

As academic advising programs respond to a changing postsecondary environment, advising structures employed must include exemplary practices that pay particular attention to key institutional learning outcomes, serve the distinctive needs of a range of student populations, promote national agendas on degree completion (Drake et al., 2013), and contribute to our understanding of the impact of academic advising on student success. In addition, the increasing public attention placed on college completion

means increased visibility for academic advising. Reports such as *Guided Pathways to Success* (Complete College America, 2013) and *Show Me the Way: The Power of Advising in Community Colleges* (Center for Community College Engagement, 2018) point to the importance of academic advising to student success.

The NACADA *Concept of Academic Advising* (NACADA, 2006) purports that academic advising objectives differ among institutions based upon the particular mission, goals, curriculum, co-curriculum, and assessment methods established for the respective campus (White, 2000). NACADA's intensified research agenda over the past two decades has resulted, in part, in the recognition of the role of effective advising on student retention and persistence. Klepfer and Hull (2012), for example, note "the strength of academic advising as a factor in persistence. College students who reported visiting with advisors frequently had a much greater likelihood of persisting than their peers who never did" (para. 17). In turn, the resulting "intensified focus on advising makes it imperative that we assess our academic advising programs to make sure that students are learning from their advising experiences" (Robbins, 2016). According to NACADA (2018a, 2018b) there has been an increased demand over the past two decades for professional development opportunities on assessment of academic advising, a growing number of NACADA consultations involving assessment of advising, an increase in NACADA Conference presentations concerning assessment of academic advising, and more advising programs initiating assessment processes each year. Further, assessment of student learning and development is a fundamental component of the CAS General Standards (CAS, 2018) as well as the CAS Standards for Academic Advising.

Habley (1994) notes that in fact "academic advising is the only structured service on the campus in which all students have the opportunity for on-going, one-to-one contact with a concerned representative of the institution" (p. 10). Today, advisors utilize many theories and strategies from the social sciences, humanities, and education to inform practice. When applying these paradigms, they foster productive relationships with students in support of their higher education goals. Thus, advisor adherence to CAS Standards advances the common goals of academic advising. Lowenstein (2006) observes that "an excellent advisor does for students' entire education what the excellent teacher does for a course: helps them order the pieces, put them together to make a coherent whole, so that the student experiences the curriculum not as a checklist of discrete, isolated pieces but instead as a unity, a composition of interrelated parts with multiple connections and relationships" (para. 5). Academic advisors meet these obligations through applying frameworks for good practice, including building partnerships with pivotal campus offices such as orientation, first-year student programs, and career services.

As institutions seek to increase and diversify enrollments, academic advisors are vital to ensuring appropriate matriculation and transfer leading to degree completion for all students. The evolving manner by which students complete college degrees, including the blending of courses offered on a variety of campuses and online, places new challenges on academic advisors, who must possess the tools needed to meet the demands of students in virtual space and across multiple institutions (Complete College America, 2013).

A crucial component of the college experience, academic advising encourages students to cultivate meaning in their lives, make significant decisions about their futures, and access institutional resources. There is growing evidence that when practiced with competence and dedication, academic advising is integral to student success, persistence, retention, and completion (Klepfer & Hull, 2012; Kot, 2014; O'Banion, 2016). Therefore, academic advisors must develop the tools and skills necessary to address the many issues that influence student success and do so with respect to the increasing diversity on college and university campuses. The 21st century college student listens as society questions the value of their higher education, engages with social media for resources, and experiences identity development and salience through multiple venues. Therefore, the standards and guidelines in the

Academic Advising Programs Standards provide a framework for developing strong academic advising programs that support the complexity of the modern student.

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# ACADEMIC ADVISING PROGRAMS

## CAS Standards and Guidelines

### *Guiding Principle: Students and Their Environments*

#### **Part 1. MISSION**

##### *1.1 Programs and Services Mission*

The mission of Academic Advising Programs (AAP) is to assist students as they define, plan, and achieve their educational goals. AAP must advocate for student success and persistence.

AAP must develop and define its mission.

The AAP mission must be consistent with the mission of the department, college, division, institution, and applicable professional standards.

The AAP mission must be appropriate for the institution's students, designated clients, and other constituents.

Whether centralized or decentralized in its administration, AAP must advance its mission.

##### *1.2 Mission Statement*

AAP must implement, disseminate, regularly review, and update its mission statement.

Mission statements must reference student learning, development, and success.

#### **Part 2. PROGRAM AND SERVICES**

##### *2.1 Program and Services Goals*

Academic Advising Programs (AAP) must be guided by a set of written goals and objectives that are directly related to the stated mission.

The AAP goals must be aligned with institutional priorities and expectations of the functional area.

AAP must regularly develop, review, evaluate, and revise its goals.

AAP must communicate goals and progress toward achievement to appropriate constituents.

##### *2.2 Program Information and Services*

AAP must provide relevant information, services, and resources consistent with its mission and goals.

AAP advisors must engage students in the shared responsibility of academic advising.

AAP advisors should offer advising sessions in a format that is

- private and safe

- convenient and accessible to the student, employing the use of electronic and multimedia formats and traditional in-person or telephone interactions as appropriate
- carried out individually or in groups, depending on the needs of the student and always with the student's consent

**AAP must provide current and accurate advising information.**

**AAP must clarify institutional policies and procedures for students.**

**AAP must raise awareness of institutional and community resources and services for students.**

**AAP must monitor academic progress, proactively identify academically at-risk students, and connect those students with appropriate resources to facilitate student success.**

**AAP must develop and implement strategies for outreach and promotion.**

**AAP must promote the program such that the campus community can identify the individual or group coordinating academic advising.**

**AAP must clearly delineate, publish, and disseminate information about specific advisor responsibilities to the campus community.**

### ***2.3 Program Structure and Framework***

**AAP must have clearly stated, current, relevant, and documented**

- **goals and outcomes**
- **policies and procedures**
- **responsibilities and performance expectations for personnel**
- **organizational charts demonstrating clear channels of authority**

**AAP must be purposefully structured and resourced to balance efficiency and effectiveness and to achieve programmatic and student learning and development outcomes.**

The specific model used for AAP should be consistent with the mission, structure, and resources of the institution.

AAP may be a centralized or decentralized function with a variety of employees throughout the institution assuming responsibilities.

**AAP must provide adequate resources to ensure that academic advising caseloads are consistent with the institutional mission and stated goals.**

Factors that affect determination of advising caseloads include mode of delivery, advising approach used, additional advisor responsibilities, student needs, and time required for this activity.

The academic status of the student being advised should be taken into consideration when determining caseloads. Specific students groups (e.g., undecided students or students on academic probation) may require more advising time than upper-division students who have declared their majors.

Workloads should reflect that advisors may work with students not officially assigned to them and that advising related responsibilities may extend beyond direct contact with students.

**Regardless of organizational structures, AAP must work in close consultation and collaboration with others with expertise and resources to meet the needs and interests of students and designated clients.**

**AAP must collaborate with colleagues and departments across the institution to promote student learning, development, and success.**

### ***2.4 Program Design***

**AAP must be intentionally designed to**

- **achieve predetermined student learning and development outcomes**
- **incorporate research and theories on student learning, development, and success**
- **respond to needs of individuals, constituents, and populations with distinct needs**
- **ensure access for students and designated clients**

**AAP must provide the same quality of academic advising and in the appropriate accessible forums to distance learners as it does to students on campus.**

**AAP must make advising available to students throughout their time at the institution.**

## **Part 3. STUDENT LEARNING, DEVELOPMENT, AND SUCCESS**

### ***3.1 Program Contribution to Student Learning, Development, and Success***

**Academic Advising Programs (AAP) must contribute to students' formal education, which includes both curricular and co-curricular experiences.**

**AAP must promote student learning, development, and personal growth to encourage self-sufficiency.**

**AAP must contribute to students' progression and timely completion of educational goals.**

**AAP must assist students in identifying the realistic timeframe to complete their educational goals and support their efforts.**

**AAP must help students and designated clients prepare for their careers and meaningful contributions to society.**

**AAP must provide opportunities that help inform student choices and decisions about academic work and about educational, career, and life goals.**

**AAP must support students, on an ongoing basis, as they establish and evaluate their educational, career, and life goals.**

**AAP advisors should inform students that the ultimate responsibility for making decisions about educational plans and life goals rests with the individual student.**

**AAP must work with the institution to identify relevant and desirable student success outcomes.**

**AAP must advocate for appropriate resources to facilitate student success.**

**AAP must identify relevant and desirable student learning and development outcomes.**

**AAP must implement strategies and tactics to achieve these outcomes.**

**When institutional policy or process interferes with students' learning and development, AAP must advocate for change using appropriate institutional means.**

### ***3.2 Student Learning and Development Domains and Dimensions***

**AAP must align predetermined student learning and development outcomes with the CAS learning outcomes model or other recognized student learning and development models.**

**AAP must align predetermined student learning and development outcomes with the institutional framework for student outcomes.**

The CAS student learning and development outcomes model includes six broad categories (called domains), meant to identify the aspects of learning experienced by students through engaging with programs, disciplines, or other learning opportunities. The domains are further clarified through dimensions. The dimensions of student learning and development allow for a more focused assessment approach and opportunities for alignment with institutional mission and priorities.

Domain: knowledge acquisition, integration, construction, and application

- Dimensions: understanding knowledge from a range of disciplines; connecting knowledge to other knowledge, ideas, and experiences; constructing knowledge; and relating knowledge to daily life

Domain: cognitive complexity

- Dimensions: critical thinking, reflective thinking, effective reasoning, and creativity

Domain: intrapersonal development

- Dimensions: realistic self-appraisal, self-understanding, and self-respect; identity development; commitment to ethics and integrity; and spiritual awareness

Domain: interpersonal competence

- Dimensions: meaningful relationships, interdependence, collaboration, and effective leadership

Domain: humanitarianism and civic engagement

- Dimensions: understanding and appreciation of cultural and human differences, social responsibility, global perspective, and sense of civic responsibility

Domain: practical competence

- Dimensions: pursuing goals, communicating effectively, technical competence, managing personal affairs, managing career development, demonstrating professionalism, maintaining health and wellness, and living a purposeful and satisfying life

[Learning and Development Outcomes: See the Council for the Advancement of Standards Student Learning and Development Outcomes ([www.cas.edu/learningoutcomes](http://www.cas.edu/learningoutcomes)) for examples of outcomes related to these domains and dimensions.]

### ***3.3 Assessment of Student Learning and Development***

**AAP must assess the student learning and development outcome domains and dimensions relevant to the functional area.**

**AAP must provide evidence of the extent to which student learning and development outcomes are achieved.**

**AAP must provide evidence of the extent to which student success outcomes are achieved.**

**AAP must use evidence to create strategies for improving student learning, development, and success.**

## **Part 4. ASSESSMENT**

### ***4.1 Establishing a Culture of Assessment***

**Academic Advising Programs (AAP) must develop assessment plans and processes that document progress toward achievement of mission, goals, outcomes, and objectives.**

**AAP must design assessment plans that incorporate an ongoing cycle of assessment activities.**

**AAP must have fiscal, human, professional development, and technological resources to develop and implement assessment plans.**

### ***4.2 Program Goals, Outcomes, and Objectives***

**AAP must identify goals, outcomes, and objectives to guide its work.**

**AAP must identify assessment methods that will allow for the collection of relevant data on its goals, outcomes, and objectives.**

**When collaborating with other departments on assessment activities, these activities must be consistent with the AAP mission and assessment plan.**

### ***4.3 Assessment Plan and Process***

**AAP must structure assessment initiatives using the steps of the assessment cycle:**

- **set program goals, outcomes, and objectives**
- **develop and implement assessment plan**
- **review and interpret findings**
- **develop a plan for data use, continuous improvement, and reassessment**
- **implement an improvement plan**
- **review and monitor changes that have been made**

**AAP must implement the assessment process with methods that reflect universal design principles.**

**AAP must employ ethical practices in the assessment process.**

**AAP must implement assessment processes in a way that is culturally responsive, inclusive, and equitable.**

**AAP must engage students, faculty, staff, administrators, and other relevant constituents in assessment activities.**

#### ***4.4 Gathering Evidence***

**AAP must identify priorities for assessment, including both formative and summative approaches.**

**AAP must employ multiple methods and measures of data collection.**

**AAP must develop manageable processes for gathering, interpreting, and evaluating data.**

**AAP must adhere to institutional policies related to data access and management.**

**AAP must ensure measures and methods are rigorous and reflect characteristics of validity, reliability, and trustworthiness.**

#### ***4.5 Review and Interpret Findings***

**AAP must use methods to analyze and interpret data that correspond with objectives and questions considered within overall assessment goals.**

**AAP must disaggregate data to address the objectives and questions considered in the assessment project.**

#### ***4.6 Reporting Results and Implementing Improvement***

**AAP must use assessment results to demonstrate student learning, development, and success.**

**AAP must use assessment results to demonstrate effectiveness and continuous improvement.**

**AAP must use evidence from assessment activities to inform decision-making and planning for continuous improvement.**

**AAP must monitor improvements implemented based on assessment results.**

**AAP must apply results for future planning.**

**AAP must inform constituents of assessment results and how data have been used for continuous improvement.**

**AAP must distribute relevant data regarding student needs, preferences, and performance for use in institutional decisions and policy.**

*Guiding Principle: Advocating for Diverse, Equitable, and Inclusive Communities*

**Part 5. ACCESS, EQUITY, DIVERSITY, AND INCLUSION**

***5.1 Inclusive and Equitable Educational and Work Environments***

Within the context of each institution's mission and in accordance with institutional policies and applicable codes and laws, Academic Advising Programs (AAP) must create and maintain educational and work environments for students, faculty, staff, administrators, designated clients, and other constituents that are welcoming, accessible, inclusive, equitable, and free from bias or harassment.

AAP must not discriminate on the basis of race; color; national origin; sex; disability; age; cultural identity; ethnicity; nationality; citizenship; family educational history (e.g., first generation to attend college); political affiliation; religious affiliation; sexual orientation; gender identity and expression; marital, family, social, economic, place of residence, or veteran status; or any other basis included in codes, laws, and institutional policies.

***5.2 Organizational Aspects of Access, Equity, Diversity, and Inclusion***

AAP must provide equitable access to facilities and resources for all constituents.

AAP must respond to the needs of all constituents when establishing hours of operation and developing methods for delivering programs, services, and resources.

AAP must identify and address actions, policies, and structures within its operation that perpetuate systems of privilege and oppression.

***5.3 Advocating for Access, Equity, Diversity, and Inclusion***

AAP must advocate for accessible facilities and resources, and address issues that impede access.

AAP must advocate for inclusion, multiculturalism, and social justice within the institution.

AAP must enact culturally responsive, inclusive, respectful, and equitable practices in the provision of services.

AAP must develop plans for ongoing professional development on cultural competence and workplace inclusion.

***5.4 Implementing Access, Equity, Diversity, and Inclusion***

AAP must establish goals for access, equity, diversity, and inclusion.

AAP must address the characteristics and needs of diverse constituents when establishing and implementing culturally relevant and inclusive programs, services, policies, procedures, and practices.

AAP must ensure that personnel are trained in diversity, equity, access, and inclusion and are held accountable for applying the training to its work.

**AAP must have an established protocol for, and foster expectation of, bias incident reporting.**

**Personnel within AAP must cultivate understanding of identity, culture, self-expression, and heritage.**

**Personnel within AAP must promote respect for commonalities and differences among people within their historical and cultural contexts.**

**When educational and/or workplace accommodations are requested, AAP must provide individuals with an interactive process to determine reasonable accommodations.**

*Guiding Principle: Organization, Leadership, and Human Resources*

## **Part 6. LEADERSHIP, MANAGEMENT, AND SUPERVISION**

### ***6.1 Leadership***

**Academic Advising Programs (AAP) leaders must model ethical behavior and demonstrate alignment with institutional mission, goals, and ethical practices.**

**Leaders with organizational authority for AAP must provide management and supervision as well as lead strategic planning and program advancement.**

**AAP leaders must**

- **create a vision for the functional area**
- **communicate goals**
- **model and expect commitment**
- **build teams, coalitions, and alliances**
- **influence others to contribute to the effectiveness and success of the unit**
- **advance diversity, equity, access and inclusion goals in the workplace**
- **incorporate data and information in decision making**
- **develop a risk management plan for the organization**
- **incorporate sustainable practices in the design of programs, services, and facilities**
- **develop and empower new leaders from within the organization**
- **collaborate with colleagues and departments across the institution**
- **adhere to organizational constraints**

**AAP leaders must advance the functional area by**

- **advocating for and actively promoting the functional area's mission and goals**
- **communicating with constituents about current issues affecting the profession**
- **identifying and addressing individual, organizational, and environmental conditions that foster or inhibit mission achievement**
- **facilitating discussion and decisions regarding program advancement**
- **advocating for representation in strategic planning processes at departmental, divisional, and institutional levels**

### ***6.2 Management***

**AAP managers must**

- be empowered to demonstrate effective management
- plan, allocate, and monitor the use of fiscal, physical, human, intellectual, and technological resources
- develop plans for scholarship, leadership, and service to the institution and the profession
- engage diverse perspectives from within and outside the unit to inform decision making

### *6.3 Supervision*

AAP supervisors must

- incorporate institutional policies and procedures in the development of strategies for recruitment, selection, professional development, supervision, performance planning, succession planning, evaluation, recognition, and reward of personnel
- consult with institutional HR personnel to access and receive education and training that influence successful performance of personnel
- provide feedback on personnel performance
- identify and resolve workplace conflict
- follow institutional policies for addressing complaints
- provide reports and activity updates to management
- work with personnel to develop plans for scholarship, leadership, and service to the profession and institution
- provide supervision and support so that personnel may complete assigned tasks

### *6.4 Strategic Planning*

AAP leaders, managers, and supervisors must facilitate ongoing strategic planning processes that

- facilitate continuous development, implementation, assessment, and evaluation of program effectiveness and goal attainment congruent with institutional mission and ongoing planning efforts
- support ongoing assessment activities that improve student learning, development, and success
- utilize philosophies, principles, and values that guide the work of the functional area
- promote environments that provide opportunities for student learning, development, and success
- develop, adapt, and improve programs and services in response to the needs of changing environments, populations served, and evolving institutional priorities
- engage many diverse constituents and perspectives from within and outside the unit to inform the development and implementation of the planning process
- result in a vision and mission that drive short- and long-term planning
- set goals and objectives based on the needs of the populations served, intended student learning and development outcomes, and program outcomes

## **Part 7. HUMAN RESOURCES**

### *7.1 Staffing and Support*

Academic Advising Programs (AAP) must identify the level of staffing necessary to achieve its mission and goals.

**AAP must be staffed by individuals qualified to accomplish its mission and goals. Personnel include full-time and/or part-time faculty, staff, administrators, and paraprofessionals (e.g., student employees, interns, graduate assistants, and volunteers).**

**AAP must have access to technical and support personnel to accomplish its mission.**

**Advisors must have an opportunity to determine and articulate the need for administrative, technological, and executive support of advising.**

Support personnel and technical staff responsibilities may include:

- maintaining student records
- organizing resource materials
- receiving students
- making appointments
- handling correspondence
- meeting other operational needs
- assisting with research, data collection, systems development, and special projects

**AAP professional personnel either must hold an earned graduate or professional degree in a field relevant to their position or must possess an appropriate combination of educational credentials and related work experience.**

AAP personnel may be full-time or part-time professionals for whom advising is a primary or secondary function; they also may be faculty members whose responsibilities include advising.

### ***7.2 Employment Practices***

**AAP must establish procedures and expectations for personnel recruitment, selection, training, supervision, performance, and evaluation.**

**AAP leaders must**

- ensure that all personnel have written position descriptions
- regularly review position descriptions
- maintain copies of up-to-date resumes/curriculum vitae for all currently employed personnel
- implement recruitment and selection/hiring strategies that demonstrate a deliberate effort to diversify the workforce
- develop promotion practices that are fair, inclusive, proactive, and non-discriminatory

**AAP leaders must establish, in partnership with personnel and aligned with institutional policies, work arrangements (e.g., schedules, remote work) that achieve department objectives.**

**Personnel within AAP must have written performance goals, objectives, and outcomes for each performance cycle to be used to plan, review, and evaluate work and performance. The performance plan must be updated regularly to reflect changes during the performance cycle.**

**Results of individual personnel evaluations must be used to recognize personnel performance, address performance issues, implement individual and/or collective personnel development and training programs, and inform the assessment of AAP.**

### ***7.3 Personnel Training and Development***

**AAP personnel must receive training when hired and professional development throughout their employment.**

**AAP personnel must engage in continuing professional development activities to keep abreast of the research, theories, legislation, policies, and advancements that affect its programs and services.**

Continuing and regular professional development should address

- theories of student development, student learning, career development, and other relevant theories
- academic advising approaches and best practices
- research, assessment, and evaluation processes
- widely adopted purposes of academic advising and its relevance to student success at the institution
- strategies that contribute to achievement of student learning outcomes
- academic policies and procedures, including institutional transfer policies and curricular changes
- ethical and legal issues including U.S. Family Education and Records Privacy Act (FERPA)/Canadian Freedom of Information and Protection of Privacy (FOIPP) and other privacy laws and policies
- technology and software training (e.g., to perform degree audits, web registrations)
- comprehensive knowledge of the institution's programs, academic requirements, policies and procedures, majors, minors, and certificate programs
- institutional and community resources and services (e.g., research opportunities, career services, internship opportunities, counseling and health services, tutorial services)
- non-discrimination and accommodations laws and directives (e.g., Americans with Disabilities Act (ADA)/Canadian Human Rights Act)
- strategies for building strong relationships and connections with students from diverse backgrounds through a variety of advising interactions

**AAP must provide personnel with appropriate professional development opportunities or resources that facilitate individual professional development goals and improve competence, skills, and leadership capacity.**

**AAP must support learning and professional development for those involved in delivery of academic advising.**

**AAP personnel must have access to resources and receive specific training on policies, procedures, and laws related to**

- **the programs and services they support**
- **privacy and confidentiality**
- **student records and sensitive institutional information**
- **systems and technologies necessary to perform their assigned responsibilities**
- **sexual misconduct, harassment, and workplace violence**

**AAP personnel must be trained on how to recognize and address systems of oppression in the workplace and facilitate a welcoming, inclusive work environment.**

**AAP personnel must be trained on how and when to refer those in need of additional assistance to qualified personnel, and must have access to a supervisor for assistance in making these judgments.**

**AAP must provide advisors with training and development for making effective referrals to both on- and off-campus services and agencies.**

**AAP leaders must ensure that personnel are knowledgeable about and trained in safety, emergency procedures, identifying threatening conduct or behavior, crisis prevention, response, and reporting.**

#### ***7.4 Paraprofessional Personnel***

**Paraprofessionals working in AAP must be enrolled in an appropriate field of study and/or have relevant experience.**

**Paraprofessionals working in AAP must be carefully selected, trained, supervised, and evaluated by personnel who possess applicable educational credentials, work experience, and have supervisory experience.**

Paraprofessionals and peer advisors may assist advisors.

**AAP leaders must accommodate the dual roles paraprofessionals may have as both student and employee.**

**AAP leaders must**

- **adhere to parameters of paraprofessionals' job descriptions**
- **articulate intended student learning and development outcomes in student employee job descriptions**
- **adhere to agreed-upon work hours and schedules**
- **offer flexible scheduling options as needed by the student employee**
- **work with paraprofessionals to determine suitable compensation if circumstances necessitate additional hours**

### **Part 8. COLLABORATION AND COMMUNICATION**

#### ***8.1 Collaboration***

**Academic Advising Programs (AAP) personnel must collaborate and consult with institutional leaders, faculty, individuals, and departments essential to the success of the program.**

**AAP must collaborate with individuals, groups, communities, and organizations to**

- **establish, maintain, and promote understanding and effective relations**
- **garner support and resources**
- **meet the needs of students, designated clients, and other constituents**
- **achieve program and student outcomes**
- **engage diverse populations to enrich the educational environment**
- **disseminate information about programs and services**
- **solve problems pertinent to the student population, designated clients, or the organization**

**AAP must refer students, designated clients, and other constituents to appropriate resources when assistance is needed beyond the functional area's scope.**

For referral purposes, AAP should maintain strong working relationships with relevant external agencies and campus offices. AAP should then provide comprehensive referral information to all who advise.

### ***8.2 Communication***

**AAP must provide relevant information, services, and resources that explain its mission and goals.**

**AAP must develop and implement strategies for outreach and promotion.**

**AAP promotional and descriptive information must be accurate and free of deception and misrepresentation.**

### ***8.3 Procedures and Guidelines***

**AAP must have and follow procedures and guidelines consistent with institutional policy for**

- **communicating with the media**
- **distributing information through print, broadcast, and online sources**
- **the use of social media**
- **contracting with external organizations for delivery of programs and services**
- **developing relationships with donors**
- **dissemination of relevant information in a timely manner to all constituents**

### ***Guiding Principle: Ethical Considerations***

## **Part 9. ETHICS, LAW, AND POLICY**

### ***9.1 Ethical Statements***

**Academic Advising Programs (AAP) must review and adopt appropriate standards of ethical practice including those of applicable professional associations.**

**AAP must have clearly defined and documented ethical statements addressing**

- **conflicts of interest, or appearance thereof, by personnel in the performance of their work**
- **management of institutional funds**
- **acceptance, in gratis, of cash or merchandise in accordance with institutional advancement reporting policies**
- **solicitation of gifts, in accordance with institutional advancement reporting policies**
- **research and assessment with human participants or animal subjects**
- **confidentiality of research and assessment data**
- **personnel, student, and other designated clients' rights and responsibilities**
- **disclosure of information in student, personnel, and other designated clients' records**

### ***9.2 Ethical Practice***

**AAP personnel must employ ethical decision making in the performance of their duties.**

**AAP personnel must recognize and avoid conflicts of interest that could adversely influence their judgment or objectivity and, when unavoidable, recuse themselves from the situation.**

**AAP personnel must be honest, objective, and impartial in their interactions.**

**AAP must demonstrate responsibility for sound and ethical assessment, research, evaluation, and program review.**

**AAP must encourage and provide a forum for personnel to address and report unethical behavior.**

**AAP must address issues surrounding scholarly integrity.**

**AAP personnel must perform duties within the scope of their position, training, expertise, and competence.**

**AAP personnel must make referrals when issues presented exceed the scope of their position.**

**AAP personnel must recognize their responsibility to ensure the privileged, private, or confidential nature of advisors' interactions with students is not sacrificed.**

### ***9.3 Legal Obligations and Responsibilities***

**AAP must comply with laws, regulations, policies, and procedures that relate to its respective responsibilities and that pose legal obligations, limitations, risks, and liabilities for the institution as a whole.**

**Advisors must be knowledgeable about and sensitive to laws, regulations, policies, and procedures, particularly those governing harassment, use of technology, personal relationships with students, privacy of student information, non-discrimination, and equal opportunity policies.**

**In accordance with governmental laws, institutional policy, and standards of good professional practice, AAP personnel who are concerned about students' well-being must ensure that they are referred to appropriate resources.**

**AAP must have a process for accessing legal advice needed for personnel to carry out their assigned responsibilities.**

**AAP must not discriminate based upon institutional policies, codes, or governmental laws.**

**AAP must purchase or obtain permission to use copyrighted materials and instruments. References to copyrighted materials and instruments must include appropriate citations.**

### ***9.4 Policies and Procedures***

**AAP must have written policies and procedures on operations, transactions, or tasks that have legal implications.**

**AAP must have and follow a timeline for reviewing policies and procedures. The creation and revision of policies and procedures must be informed by available evidence, and policies and procedures that inform the management of higher education.**

**AAP must have policies and procedures consistent with institutional policy for responding to threats, emergencies, and crisis situations.**

### ***9.5 Communication of Ethical and Legal Obligations***

**AAP must educate new personnel to relevant ethical standards, statements of ethical practice, and related institutional policies and procedures.**

**AAP must inform its users of ethical and legal obligations and limitations emanating from codes and laws or from licensure requirements.**

**AAP personnel must provide students, designated clients, and constituents with information about student privacy rights and personnel's disclosure obligations.**

**AAP must create ongoing opportunities to explore and examine basic ethical beliefs important to the functional area.**

**AAP must inform personnel about internal and external governance organizations that affect the functional area.**

**AAP must inform personnel about professional liability insurance options and refer them to external sources if the institution does not provide coverage.**

### ***9.6 Addressing Harassment and Hostile Environments***

**AAP personnel must neither participate in nor condone any form of harassment or activity that demeans persons or creates an intimidating, hostile, or offensive environment.**

**AAP must adhere to institutional policies and procedures regarding sexual misconduct, harassment, and workplace violence.**

## ***Guiding Principle: Learning-Conducive Structures, Resources, and Systems***

### **Part 10. FINANCIAL RESOURCES**

#### ***10.1 Funding***

**Academic Advising Programs (AAP) must have the funding that is necessary to accomplish its mission and goals.**

**AAP must determine with administrative leadership what funding is necessary.**

**Sufficient institutional and financial resources must be provided to assist professional development of academic advisors.**

Financial resources should be used to raise awareness of the academic advising program and its value to a range of stakeholders.

## ***10.2 Financial Planning***

**In establishing and prioritizing funding resources, AAP must conduct comprehensive analyses to determine**

- **unmet needs of the unit**
- **relevant expenditures**
- **external and internal resources**
- **impact on students and the institution**

**AAP must use the budget as a planning tool to reflect commitment to the mission and goals of the functional area and of the institution.**

**AAP financial reports must provide an accurate financial overview of the organization and provide clear, understandable, and timely data upon which personnel can plan and make informed decisions.**

## ***10.3 Financial Management***

**AAP must manage funds in accordance with established governmental laws and institutional policies, procedures, and guidelines.**

**AAP must demonstrate responsible stewardship and use of fiscal resources.**

**AAP must have procedures and guidelines consistent with institutional policy for applying to and managing funds from external resources.**

**AAP must be provided with the institutional and financial resources to assist with professional development of personnel.**

**AAP procurement procedures must**

- **be consistent with institutional policies**
- **ensure that purchases comply with laws and codes for usability and access**
- **ensure that the institution receives value for the funds spent**
- **consider information available for comparing the ethical and environmental impact of products and services purchased**

## **Part 11. TECHNOLOGY**

### ***11.1 Systems Management***

**Academic Advising Programs (AAP) must have current technology to support the achievement of its mission and goals.**

**AAP must incorporate accessibility features into technology-based programs and services.**

**AAP must ensure that personnel and constituents have access to training and support for technology use.**

**AAP must back up data on a cycle established in partnership with the institution's information technology department.**

**AAP must implement a replacement plan and cycle for all technology with attention to sustainability.**

### ***11.2 User Engagement***

**AAP must use technology to enhance the delivery of programs and services for all constituents.**

**AAP must employ appropriate and accessible technology to support the delivery of advising information.**

**AAP must ensure that online and technology-assisted advising includes appropriate processes for obtaining approvals, consultations, and referrals.**

**AAP must ensure that technology addresses constituent needs.**

**AAP must employ technologies that facilitate user interaction.**

**AAP must provide secure remote access.**

### ***11.3 Compliance and Information Security***

**AAP must have policies on the appropriate use of technology that are clear and easily accessible.**

**AAP must comply with governmental codes and laws and with institutional technology policies and procedures.**

**AAP must provide a secure platform when conducting financial transactions, in accordance with industry best practices.**

### ***11.4 Communication***

**AAP must have updated websites that provide information to all constituents in accessible formats.**

**AAP must use technology that allows users to communicate sensitive information in a secure format.**

**AAP must evaluate relevant social media platforms and techniques for communication, and implement those that best meet constituent needs.**

**AAP must evaluate multiple modes of communication including, but not limited to, phone, text, and web chat.**

## **Part 12. FACILITIES AND INFRASTRUCTURE**

### ***12.1 Design of Facilities***

**Academic Advising Programs (AAP) facilities must be located in suitable spaces designed to support the functional area's mission and goals.**

**AAP facilities must be intentionally designed to engage various constituents, promote learning, and provide accessible and safe spaces.**

**AAP facilities must be designed to protect the security and privacy of records and ensure the confidentiality of sensitive information and conversations.**

**AAP must incorporate universal design principles.**

**AAP facilities must be designed and constructed to be energy-efficient and sustainable.**

### ***12.2 Work Space***

**AAP personnel must have equipped and well-maintained workspaces designed to support their work and responsibilities.**

**AAP must provide work space that is private and free from visual and auditory distractions.**

**AAP personnel must be able to safeguard the privacy of their work.**

### ***12.3 Equipment Acquisition***

**When acquiring capital equipment, AAP must take into account expenses related to regular maintenance and life cycle costs.**

**AAP must incorporate sustainable practices when purchasing equipment.**

### ***12.4 Facilities and Equipment Use***

**AAP facilities and equipment must be inspected on an established cycle and be in compliance with codes, laws, and established practices for accessibility, health, safety, and security.**

**AAP must promptly report broken, malfunctioning, defective, unusable, or faulty facilities and equipment to the entity responsible for maintenance.**

**AAP must develop sustainable practices for facilities use.**

**AAP must assess the effectiveness of its facilities to ensure they are meeting facilities and equipment goals.**

**AAP personnel must advocate for appropriate, consistent, and fair assignment of facilities and equipment.**

*General Standards revised in 2018;  
AAP content developed/revised in 1986, 1997, 2005, & 2013*

*The AAP Standards and Guidelines should be considered in conjunction with the AAP Contextual Statement, CAS Glossary of Terms, and CAS Guiding Principles.*

**THE UNIVERSITY OF MONTANA - MISSOULA  
CONSENT TO DISCLOSE STUDENT EDUCATION RECORDS  
(Form to be completed and signed by student)**

If any person other than you needs or will need access to your education records as maintained by The University of Montana, complete this form and return it to the Griz Central or the Registrar's Office, Room 201, Emma Lommasson Center. Other University officials may take this form directly from the student and forward to the Registrar's Office. *(This form must be signed by the student in the presence of a university employee, or if being completed elsewhere, the form should be signed in the presence of a notary public and notarized before being forwarded to The University. The form may be faxed or scanned into a pdf so long as the notary information can be viewed.)*

**Federal Law and Student Academic Records**

Family Educational Rights and Privacy Act of 1974 (FERPA). FERPA defines the requirements for access to and release of student education records. Student education records are generally defined as records that are directly related to a student and are maintained by an educational institution. The University of Montana has designated certain parts of a student's education record as "Directory Information," which may be disclosed to third parties without the student's written permission unless the student requests non-disclosure at the Registrar's Office. Student education records include, but are not limited to, course grades, billing records, and disciplinary records.

In general, education records that are not designated Directory Information may be disclosed only to the student unless the student provides written consent to disclose those records to other persons. However, disclosure of non-directory information may be made to (1) to parents or legal guardians of a student who is under 21 years of age and has been disciplined by the college for any alcohol or drug policy violations, and (2) to parents or legal guardians of a student who is in a health and safety crisis.

**Montana Law and Student Academic Records**

MCA 20-25-515. Release of student records. Montana Code Annotated (MCA) is very specific with regard to student academic records. "A university or college shall release a student's academic record only when requested by the student or by a subpoena issued by a court or tribunal of competent jurisdiction. A student's written permission must be obtained before the university or college may release any other kind of record unless such record shall have been subpoenaed by a court or tribunal of competent jurisdiction."

---

I, \_\_\_\_\_ Student ID Number 790 - \_\_\_\_\_ - \_\_\_\_\_.

hereby give my permission to the University of Montana to release my education records to the following person(s). **This release shall remain in effect until I submit a separate written request to the Registrar's Office to change or rescind this consent to disclose my education records.**

NAME	RELATIONSHIP
1. _____	_____
2. _____	_____
3. _____	_____

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

<b>Registrar's Office Use Only:</b>	
Processed by: _____	Date: _____
8/4/2009	76

## UMI Math Courses & Placement Exam Scores

Math placement at the University of Montana depends on two criteria: a student's declared major and placement level. Many incoming students (both freshmen and transfer) may need to take a placement exam before registering for a Math placement course at UM. The University utilizes Maplesoft Math placement exams and offers three versions of the exam: Arithmetic (M01), Algebra (M02), and Calculus (M03). Students should take a specific version of the exam based on their declared or intended major. Students should speak with their Academic Advisor for exam selection guidance or visit: [http://www.umt.edu/oss/for\\_students/mathplacement/](http://www.umt.edu/oss/for_students/mathplacement/)

**Access to Math Placement Exams:** Students will complete the Maplesoft placement exam by logging in to Moodle, UM's online learning system, with their NetID and password. To login, visit: [umonline.umt.edu](http://umonline.umt.edu).

\* Effective 12/31/16, the ALEKS math placement exam will be replaced by Maplesoft math placement exams and will no longer be used for math placement at UM. However, ALEKS scores received prior to 12/31/16 may still be used to satisfy prerequisites. \*\*Alternative pre-requisites include ACT Math Score  $\geq 22$  or Old SAT Math Section  $\geq 520$  or New SAT Math Section  $\geq 550$  or SAT Math Test Score  $\geq 27.5$  (The new SAT test went into effect March 1, 2016)

Placement Exam Score	UM Math Course
No pre-requisite course	<b>M065</b> Pre-Algebra
No pre-requisite course <b>AND</b> Industrial Technology Majors Only	<b>M111</b> Technical Math
ALEKS $\geq 2$ or M01 $\geq 9$	<b>M090</b> Introductory Algebra
ALEKS $\geq 3$ or M01 $\geq 16$	<b>M095</b> Intermediate Algebra <b>M104</b> Numbers as News** <b>M105</b> Contemporary Math** <b>M115</b> Probability & Linear Math** <b>M118</b> Math for Music Enthusiasts**
ALEKS $\geq 4$ or Consent of Instructor	<b>M122</b> College Trigonometry
ALEKS $\geq 4$ or M02 $\geq 14$	<b>M121</b> College Algebra <b>M132</b> Numbers & Ops for K-8 Teachers
ALEKS $\geq 4$ or M02 $\geq 17$	<b>M151</b> Pre-Calculus
ALEKS $\geq 5$ or M02 $\geq 19$ or M03 $\geq 10$	<b>M162</b> Applied Calculus
ALEKS $\geq 5$ or M03 $\geq 15$	<b>M171</b> Calculus I



## Appendix D – UM Prevention Education Program Communication and Hold Info

Dear UM Students,

We want all students to have a positive and successful experience during their time with us at UM. One of the ways we can help with that is by requiring students to complete a series of prevention education programs — some online and one remotely via Zoom — during their time at UM. Below, you will find an overview of the programs, more information about requirements for completion, timelines, resources and contact information if you have questions.

Please log in to complete the online programs on the Prevention Education website: [www.umt.edu/prevention-education](http://www.umt.edu/prevention-education). To view the Bystander Training schedule, please visit the SARC website: [www.umt.edu/sarc/bystandertraining](http://www.umt.edu/sarc/bystandertraining).

**We feel very strongly that these programs are important for all students. If you do not complete your required program(s) by Sept. 30, you will be held from registering for Spring 2021 classes until you complete them.**

**AlcoholEdu (online)**

Contact: Cal Reynolds

406-243-5225 or [cal.reynolds@umontana.edu](mailto:cal.reynolds@umontana.edu)

**Bystander Training for New Students (Zoom)**

Contact: SARC Office

406-243-4429 or [BystanderTraining@umontana.edu](mailto:BystanderTraining@umontana.edu)

**Sexual Assault Prevention for Adult Learners (online)**

Contact: SARC Office

406-243-4429 or [BystanderTraining@umontana.edu](mailto:BystanderTraining@umontana.edu)

**Transit (optional, online)**

Contact: UM Financial Education Program

406-243-6016 or [FinancialEducation@umontana.edu](mailto:FinancialEducation@umontana.edu)

These requirements apply to **all UM students**. If you are not a new student but have not completed these programs, you must complete them in order to register.

If you have already taken one of the online programs at another Montana institution, you will need to provide verification to Cal Reynolds at 406-243-5225 or [cal.reynolds@umontana.edu](mailto:cal.reynolds@umontana.edu).

Thank you, welcome, and all the best as you begin a new semester at UM.

Sincerely,

Sarah L. Swager, Ph.D.

Vice Provost for Student Success

## Appendix E: Advanced Placement (AP) Information

*Updated Fall Semester 2020*

**Important note: The University of Montana recognizes and awards credit for the AP Capstone Diploma!** For more about the AP Diploma, visit <https://advancesinap.collegeboard.org/ap-capstone>.

All incoming students who have completed the AP Capstone Diploma will be given priority consideration for admission to [UM's Davidson Honors College](#). Students completing the AP Capstone Diploma Research course will earn the equivalent of 3 credits of HONR 190 Honors Research. Students completing the AP Capstone Seminar will earn the equivalent of 3 credits of HONR 194 Honors Seminar.

General Education and course equivalency credit is granted for the posted exams as indicated. These credits cannot be used toward upper-division coursework. Enrollment Services-Admissions will provide students with an evaluation of their credits upon receipt of official scores.

If you do not see a specific AP course on our list and would like it evaluated for credit, please contact Admissions with the course title and level. To request that your score reports be sent to the University of Montana visit the AP website (recommended) or call AP directly at (212) 713-8000. The University of Montana awards college credit to undergraduate degree students on the basis of official score reports from the Advanced Placement Program/College Board.

AP EXAMINATION	MINIMUM SCORE	UM COURSE	UM GEN ED*	UM CREDITS
Art History	3	ARTH 200H ARTH 201H	HX HY	3 3
Art: Studio Art-2-D Design	3	ARTZ 106A	A	3
Art: Studio Art-3-D Design	3	ARTZ 108A	A	3
Art: Studio Art-Drawing	3	ARTZ 105A	A	3
Biology	3	BIOB TR1N <i>Dept. of Major will substitute in Degree Works either:</i> a) <i>BIOB 160N/161N</i> <i>or</i> b) <i>BIOB 170N/171N</i> <i>or</i> c) <i>BCH 110/111</i>	N LAB	4
Biology	4	BIOB 160N BIOB 161N BIOB 170N BIOB 171N	N LAB N LAB	3 1 3 1

<b>AP EXAMINATION</b>	<b>MINIMUM SCORE</b>	<b>UM COURSE</b>	<b>UM GEN ED*</b>	<b>UM CREDITS</b>
Calculus AB	3	M 171	M	4
Calculus AB Subscore (60% portion of Calculus BC exam)	3	M171	M	4
Calculus BC *Note: No more than 8 credits will be issued for all Calulus exams combined.	3	M 171 M172	M M	4 4
Chemistry	3	CHMY TR1N	N	3
Chemistry	4	CHMY 121N	N	3
Chinese Language and Culture	3	CHIN 101 CHIN 102	- FL	4 4
Computer Science A	3	CSCI 135	-	3
Computer Science AB * Exam no longer administered	3	CSCI 135	-	3
Computer Science Principles	3	CSCI 100	-	3
Economics: Macroeconomics	3	ECNS TR1S	S	3
Economics: Macroeconomics	4	ECNS 202S	S	3
Economics: Microeconomics	3	ECNS TR1S	S	3
Economics: Microeconomics	4	ECNS 201S	S	3
English Language and Composition	3	WRIT 101	WRIT 101	6
English Literature and Composition	3	LIT TR1L	L	6
English Literature and Composition	4	LIT 110L	L IWC	6
Environmental Science	3	ENSC TR1N	N	4
Environmental Science	4	ENSC 105N	N	4
European History	3	HSTR TR1HY	HY	6

AP EXAMINATION	MINIMUM SCORE	UM COURSE	UM GEN ED*	UM CREDITS
French Language and Culture	3	FRCH 101 FRCH 102	- FL	4 4
German Language and Culture	3	GRMN 101 GRMN 102	- FL	4 4
Government and Politics: Comparative	3	PSCI 220S	S	3
Government and Politics: United States	3	PSCI 210S	SY	3
Human Geography	3	GPHY 121S	SX	3
Italian Language and Culture	3	ITLN 101 ITLN 102	- FL	4 4
Japanese Language and Culture	3	JPNS 101 JPNS 102	- FL	4 4
Latin	3	LATN 101 LATN 102	- FL	4 4
Latin: Literature * Exam no longer administered	3	LATN TRIFL	FL	6
Music Theory	3	MUSI TR1 <i>Determined by Music Department</i>		6
Physics 1	3	PHSX 205N PHSX 206N	N LAB	4 1
Physics 2	3	PHSX 207N PHSX 208N	N LAB	4 1
Physics B * Exam no longer administered	3	PHSX 205N PHSX 207N	N N	4 4
Physics C - Electricity and Magnetism	3	PHSX 217N	N	4
Physics C - Mechanics	3	PHSX 215N	N	4
Psychology	3	PSYX 100S	S	3
Research	3	HONR 192	-	3

AP EXAMINATION	MINIMUM SCORE	UM COURSE	UM GEN ED*	UM CREDITS
Seminar	3	HONR 194	-	3
Spanish Language and Culture	3	SPNS 101 SPNS 102	FL FL	4 4
Spanish Literature and Culture	3	SPNS TR1L	L	6
Statistics	3	STAT 216	M	3
United States History	3	HSTA TR1HY	HY	6
World History	3	HSTR TR1HX	HX	6

### KEY TO GENERAL EDUCATION SYMBOLS

<b>A</b> – Expressive Arts	<b>N</b> – Natural Science (without Lab) <b>LAB</b> – Natural Science Lab
<b>E</b> – Ethical and Human Values	<b>S</b> – Social Sciences
<b>FL</b> – Modern & Classical Languages	<b>X</b> – Cultural & International Diversity
<b>H</b> – Historical and Cultural Studies	<b>Y</b> – Democracy and Citizenship
<b>L</b> – Literary and Artistic Studies	<b>WRIT 101</b> – Introductory Writing Requirement <b>IWR</b> – Intermediate Writing Requirement
<b>M</b> – Math <b>M*</b> – Student should meet Mathematics Associate Chair for placement in courses	<b>Double Dippers</b> - Courses that satisfy more than one Gen Ed

## Appendix F: International Baccalaureate (IB) Information

The University of Montana recognizes IB achievement and awards credit for each Higher Level exam passed with an examination score of four or higher. The University grants credit for Standard Level exams for some IB languages or if they are taken as a component of the full Diploma.

The University of Montana will offer a maximum of 30 credits (sophomore equivalent standing) to all incoming students who have received a Diploma with a score of 30 or better, with no individual exam scores lower than four. These credits will normally be distributed as electives, although students who desire credit for specific UM courses, may petition the Admissions Office.

All incoming students who have completed the IB Diploma will be given priority consideration for admission to the [UM Davidson Honors College](#).

General Education and course equivalency credit is granted for the exams listed below as indicated. These credits cannot be used toward upper-division coursework. Enrollment Services-Admissions will provide students with an evaluation of their credits upon receipt of official scores.

If you do not see a specific IB exam on our list and would like it evaluated for credit, please email Admissions with the following information: exam title and level.

IB EXAMINATION	LEVEL	SCORE	UM COURSE	UM GEN ED*	UM CREDITS
Art/Design	HL	4	ARTZ-TR1L ARTZ-TR1X	L X	3 3
Biology	HL	4	BIOB-160/161N BIOB-170/171N	N N	4 4
Business & Management	HL	4	BMGT-TR1	-	3
Chemistry	HL	4	CHMY-121N	N	3
Computer Science	HL	4	CSCI-TR1	-	3
Dance	HL	4	DANC-TR1A DANC-TR1L	A L	2 2
Design Technology	HL	4	BGEN-TR1	-	3
Economics	HL	4	ECNS-101S ECNS-202S	S S	3 3
Environmental Systems and Societies	SL	4	ENSC 105N	N	3
Film	HL	4	FILM-TR1L	L	2
Further Mathematics	HL	4	M-TR1M	M*	8
Geography	HL	4	GEOG-TR1X	X	3
Global Politics	HL	4	PSCI-TR1SX	SX	3

<b>IB EXAMINATION</b>	<b>LEVEL</b>	<b>SCORE</b>	<b>UM COURSE</b>	<b>UM GEN ED*</b>	<b>UM CREDITS</b>
History: Africa & Middle East	HL	4	HSTR-TR1HX	HX	4
History: Americas	HL	4	HSTR-TR1HY	HY	4
History: Asia & Oceania	HL	4	HSTR-TR1HX	HX	4
History: Europe	HL	4	HSTR-TR1HY	HY	4
History: Islamic	HL	4	HSTR-TR1HX	HX	4
History: World	HL	4	HSTR-TR1HX	HX	4
Language A: English- Language & Literature	HL	4	LIT-110L WRIT-101	L & IWR COMP	3 3
Language A: English- Literature	HL	4	LIT-110L WRIT-101	L & IWR COMP	3 3
Language A: French	HL	4	FRCH-101 FRCH-102 FRCH-201 FRCH-202	- FL FL FL	3 3 3 3
Language A: German	HL	4	GRMN-101 GRMN-102 GRMN-201 GRMN-202	- FL FL FL	3 3 3 3
Language A: Japanese	HL	4	JPNS-101 JPNS-102 JPNS-201 JPNS-202	- FL FL FL	3 3 3 3
Language A: Spanish	HL	4	SPNS-101 SPNS-102 SPNS-201 SPNS-202	- FL FL FL	3 3 3 3
Language B: French	SL	4-5	FRCH-101	-	3
Language B: French	SL	6-7	FRCH-101 FRCH-102	- FL	3 3
Language B: French	HL	4-5	FRCH-101 FRCH-102 FRCH-201	- FL FL	3 3 3
Language B: French	HL	6-7	FRCH-101 FRCH-102 FRCH-201 FRCH-202	- FL FL FL	3 3 3 3
Language B: German	SL	4-5	GRMN-101	-	3

<b>IB EXAMINATION</b>	<b>LEVEL</b>	<b>SCORE</b>	<b>UM COURSE</b>	<b>UM GEN ED*</b>	<b>UM CREDITS</b>
Language B: German	SL	6-7	GRMN-101 GRMN-102	- FL	3 3
Language B: German	HL	4-5	GRMN-101 GRMN-102 GRMN-201	- FL FL	3 3 3
Language B: German	HL	6-7	GRMN-101 GRMN-102 GRMN-201 GRMN-202	- FL FL FL	3 3 3 3
Language B: Japanese	SL	4-5	JPNS-101	-	3
Language B: Japanese	SL	6-7	JPNS-101 JPNS-102	- FL	3 3
Language B: Japanese	HL	4-5	JPNS-101 JPNS-102 JPNS-201	- FL FL	3 3 3
Language B: Japanese	HL	6-7	JPNS-101 JPNS-102 JPNS-201 JPNS-202	- FL FL FL	3 3 3 3
Language B: Latin	SL	4-5	LATN-101	-	3
Language B: Latin	SL	6-7	LATN-101 LATN-102	- FL	3 3
Language B: Latin	HL	4-5	LATN-101 LATN-102 LATN-201	- FL FL	3 3 3
Language B: Latin	HL	6-7	LATN-101 LATN-102 LATN-201 LATN-202	- FL FL FL	3 3 3 3
Language B: Spanish	SL	4-5	SPNS-101	-	3
Language B: Spanish	SL	6-7	SPNS-101 SPNS-102	- FL	3 3
Language B: Spanish	HL	4-5	SPNS-101 SPNS-102 SPNS-201	- FL FL	3 3 3
Language B: Spanish	HL	6-7	SPNS-101 SPNS-102 SPNS-201 SPNS-202	- FL FL FL	3 3 3 3

IB EXAMINATION	LEVEL	SCORE	UM COURSE	UM GEN ED*	UM CREDITS
Mathematical Studies	SL	5	M-105	M	3
Mathematics	SL	4	M-151	M	4
Mathematics	HL	4	M-171 M-TR1M	M M*	4 4
Music	HL	4	MUSI-TR1A MUSI-TR1L	A L	3 3
Philosophy	HL	4	PHL-TR1Y	Y	3
Physics	HL	4	PHSX-205N PHSX-207N	N N	4 4
Psychology	SL	4	PSYX- TR1S	S	3
Social & Cultural Anthropology	HL	4	ANTY-TR1SX	SX	3
Theatre Arts	HL	4	THTR-TR1A	A	3
Visual Arts	HL	4	ARTZ-TR1L	L	4

## KEY TO GENERAL EDUCATION SYMBOLS

A – Expressive Arts
E – Ethical and Human Values
FL – Modern & Classical Languages
H – Historical and Cultural Studies
L – Literary and Artistic Studies
M – Math
M* – Student should meet Mathematics Associate Chair for placement in courses
N- Natural Science
S- Social Sciences
X- Cultural & International Diversity
Y- Democracy and Citizenship
COMP- Introductory Writing Requirement
IWR- Intermediate Writing Requirement
Double Dippers- Courses that satisfy more than one Gen Ed

## Appendix G

# CLEP

The following credit will be granted for CLEP examination scores in the following categories. For information on credit by examinations or subjects not listed, please contact Enrollment Services (800) 462-8636.

<b>CLEP EXAMINATION</b>	<b>MINIMUM SCORE</b>	<b>SEMESTER CREDIT</b>	<b>*GENERAL EDUCATION</b>
College Composition	50	6	WRIT 101
College Composition Modular-Multiple Choice Only	50	3	None
College Composition Modular with Essay	50	6	Writ 101
Humanities	50	6	L
College Mathematics	50	6	M
Natural Sciences	50	6	N without Lab
Social Sciences & History	50	6	S =3 credits H = 3
American Government	50	3	SY
American Literature	50	6	LY
Analyzing & Interpreting Literature	50	6	L

<b>CLEP EXAMINATION</b>	<b>MINIMUM SCORE</b>	<b>SEMESTER CREDIT</b>	<b>*GENERAL EDUCATION</b>
Biology	50	6	N without Lab
Introduction Business Law	50	3	None
Calculus	50	3	M
Chemistry	50	6	N without Lab
College Algebra	50	3	M
College French I	50	6	FL
College French II	59	12	FL
College German I	50	6	FL
College German II	63	12	FL
College Spanish I	50	6	FL
College Spanish II	63	12	FL
Introduction Educational Psychology	50	3	
English Literature	50	6	L
Financial Accounting	50	6	None

<b>CLEP EXAMINATION</b>	<b>MINIMUM SCORE</b>	<b>SEMESTER CREDIT</b>	<b>*GENERAL EDUCATION</b>
United States History I: Early Colonizations to 1877	50	3	HY
United States History II: 1865-Present	50	3	HY
Human Growth & Development	50	3	S
Information Systems & Computer Applications	50	3	None
Pre-calculus	50	3	M
Principles of Macroeconomics	50	3	S
Principles of Microeconomics	50	3	S
Principles of Management	50	3	S
Principles of Marketing	50	3	
Intro Sociology	50	3	S
Intro Psychology	50	3	S
Western Civilization I: Ancient Near East to 1648	50	3	HY
Western Civilization II: 1648 - Present	50	3	HY

## Appendix H – Intermediate Writing Course Appeal Policy and Procedure

**Courses taken outside of the University of Montana do NOT automatically meet the approved writing requirement**, even when the UM equivalent is on the list of approved writing courses. For example, LIT 110L is on the UM list of approved writing courses. However, if a student takes a 3 credit course equivalent to LIT 110L at their local college over the summer, they satisfy the “L” (Literary and Artistic Studies) General Education requirement, but not the Approved Writing requirement.

If a student believes that a course they took at another institution meets the [guidelines](#) for an approved writing course, the student may petition for an exemption through the Writing Committee. The Appeal may be submitted to the Faculty Senate Office, UH 221, [camie.foos@mso.umt.edu](mailto:camie.foos@mso.umt.edu) (243-5553). The appeal must include the following:

1. A cover letter outlining the basis for the request. The cover letter should clearly articulate how the proposed course meets the outcomes of the University of Montana course. Include pertinent information such as contact information, student ID number, and how you fulfilled this requirement in a course at your previous institution.
2. A syllabus and course description. The course must include at least 16 pages of writing for assessment and at least 50% of the course grade should be based on your performance on writing assignments.
3. Three papers from the equivalent writing course or courses following the completion of the course with original instructor comments. Original instructor comments are those grading and feedback markings on papers that are returned to the student for revision or at the end of the term. Papers without these comments will not be considered. At least one of these papers must be at least six pages long and include a bibliography or works cited. Your papers should demonstrate your ability to:
  - Use writing to learn and synthesize new concepts
  - formulate and express written ideas that are developed, logical, and organized
  - Compose written texts that are appropriate for a given audience, purpose, and context
  - Revise written work based on comments from the instructor
  - Find, evaluate, and use information effectively and ethically
  - Begin to use discipline-specific writing conventions
  - Demonstrate appropriate English language usage.

Incomplete packets will not be evaluated.

This information pertains only to the approved writing course, not the departmental upper-division writing requirement. Students should speak to their major department regarding any issues relating to the upper-division writing requirement.

### Review Procedure

Petitions are reviewed by the Director of Composition and two other faculty members from the Writing Committee. The subcommittee reports its decision to the Writing Committee. Notice of the decision is sent to the student’s University of Montana email address.

# Appendix I

## General Education & Montana University System Transferable Core

### How Do General Education Courses Transfer in the MUS?

Students attending Montana University System campuses have three options for transferring general education core requirements: (1) complete all lower-division general education requirements for one specific campus, (2) complete the Montana University System Core transferable general education curriculum (also known as the MUS Transfer Core or the MUS Core), or (3) obtain an A.A. or A.S. transferrable degree. **This document provides additional information for faculty and academic advisors working with students selecting option 2.**

Students who have earned 20 or more credits equivalent to the approved Montana University System Transfer Core (see [MUS Transfer core website - http://mus.edu/transfer/MUScore.asp](http://mus.edu/transfer/MUScore.asp)) as a degree-seeking student at another institution prior to their initial registration at UM-Missoula may choose to complete the MUS Transferable General Education Curriculum to satisfy all UM lower division General Education requirements. Students will still have to complete UM's advanced writing requirement.

Credits earned as a non-degree seeking student (e.g., AP, CLEP, IB, and high school pilot/dual enrollment credits) can only be counted towards the 20 credits eligibility requirement for a student to use the MUS Transfer Core if the student has earned at least 20 credits as a degree-seeking student at another institution prior to their initial registration at UM-Missoula.

**\*\*Eligible transfer students who elect to use the MUS Transfer Core to satisfy UM general education requirements should alert their academic advisor of this decision as soon as possible. When students file the UM graduation application, they must note on the general education requirements section of the application that they are using the MUS Core instead of UM's general education requirements.**

**\*\*It is not necessary for students to notify the Registrar's Office or Admissions of their intention to use the MUS Transfer Core prior to applying for graduation.**

# MUS Transfer Core

## Transferable General Education Curriculum

The Montana University System Core (MUS Core), described in [Policy 301.10](#) and the [Operational Rules for the Montana University System Core](#), represents a transfer agreement among community, tribal, and publicly-funded colleges and universities in the state of Montana. It assures the transfer of up to **30 lower-division semester credits** for those students enrolled in courses approved within each of the following six areas:

<u>Natural Science</u>	6 credits
<u>Social Sciences/History</u>	6 credits
<u>Mathematics</u>	3 credits
<u>Communication</u>	6 credits
<u>Humanities/Fine Arts</u>	6 credits
<u>Cultural Diversity</u>	3 credits

*Note:*

Students may be required to take additional coursework at the upper division level that is part of an approved general education program at the receiving campus.

**\*\*Academic advisors should use the following website to verify that MUS transfer courses satisfy the above areas of the MUS Transfer Core requirements:**

**<https://ccn.mus.edu/search/>**

**Use the “General Ed. Designators” checkboxes on the above website to display all MUS courses that satisfy each MUS Transfer Core requirement area.**

**Review the Operational Rules for the MUS Transfer Core on the following page for additional, important information.**

## **Operational Rules**

### For the Montana University System Core

Operational Rule 1. In order to satisfy the Montana University System (MUS) Core, students must successfully complete at least one course that includes significant content related to the cultural heritage of American Indians. It could be a course in the cultural diversity category, or it could also be a course in any other category, as long as it has the appropriate content.

Operational Rule 2. In order to successfully complete the Montana University System Core, students must earn the minimum number of credits in each of the six (6) categories of coursework. Students can only use credit-bearing competency tests or coursework to satisfy the MUS core.

Operational Rule 3. Coursework can only be used once to satisfy the requirements of the MUS Core. It cannot be “double counted” to satisfy the requirements of more than one category.

Operational Rule 4. In order to satisfy the requirements of the Communications area, students must successfully complete a combination of courses that includes significant content in both written and oral communications.

Operational Rule 5. Students must satisfy the “minimum grade” requirements established by Board of Regents’ Policy 301.5.3, along with any exceptions to that policy that may have been established by their program of study. Information about those exceptions may be found at: <http://mus.edu/transfer/highermingrades.asp>

Operational Rule 6. Transfer students should remember that completion of the MUS Core means that they have satisfied the general education requirements at the 100 and 200-level when they move to their new campus. They will not be required to complete additional general education classes at the lower division course level. If their new campus has general education requirements at the 300 and 400-level, however, transfer students will be expected to satisfy those requirements, according to Board of Regents’ Policy 301.10 concerning general education transfer. The most common example is an upper division writing requirement on some of the campuses.

**Please note:** As students work on the Montana University System general education core, they should attempt to select classes that are also required in their major. That efficient use of coursework could help students complete their degree more quickly, since the classes could be used to satisfy both the requirements of the major and the requirements of the MUS Transfer Core.

**GRADUATION APPEALS FORM**

Please return the Appeals Form to the Office of the Registrar.

Email [Graduation@umontana.edu](mailto:Graduation@umontana.edu) or call 243-2421 or 243-2422 in regards to upcoming due dates.

NAME: ID:  
UM EMAIL: DATE:  
ADDRESS:  
CITY: STATE: ZIP:  
MAJOR: PHONE:

The Graduation Appeals Committee is charged with following university policy governing graduation requirements unless there are **exceptional, compelling, necessary, and verifiable reasons** to set it aside. Detailed information is available at: <http://www.umt.edu/facultysenate/procedures/default.php>. Scroll to form number 203.50.

**Please attach documentation in response to, or in support of, the following three steps:**

- 1. STATE YOUR REQUEST CLEARLY.** Specify the university requirement(s) to which you are requesting an exception. If your request involves transfer work, indicate the course and school where the course was taken. For example: "I am requesting that course \_\_, taken in \_\_ semester at \_\_ University be used to satisfy requirement \_\_."
- 2. STATE YOUR REASONS CLEARLY IN A BRIEF SUMMARY.** You are requesting an exception to (a) university requirement(s), and the submission of a petition does not guarantee approval. You must demonstrate that you made an effort in good faith to satisfy graduation requirements as written, that the failure to meet requirements was due to circumstances beyond your control, and that obliging you to meet the requirements now would impose an unreasonable burden.
- 3. GATHER SUPPORTING DOCUMENTATION.** Any claims made in Section 2 should be supported by evidence. Petitions to count a non-designated course or transfer course towards a General Education requirement should include a course description and syllabus, and a letter of support from the chairperson of the department involved. Writing samples should be reviewed before submitting to the graduation appeals committee.
- 4. OBTAIN THE FOLLOWING SIGNATURES.** Signatures indicate only that the undersigned have reviewed the petition for clarity and complete documentation. They do not indicate endorsement of the petition. Signatories may, if they choose, submit a supporting letter which may be added as supporting documentation. *Neither the dean, nor the dean's designee may sign as the student's advisor.*

Petitions cannot move forward without the signatures below. Emails from approvers will be accepted instead of a physical signature, please attach with petition. The signatures do not guarantee that your appeal will be approved:

**A. Student Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**B. Advisor Signature** \_\_\_\_\_

Print Name \_\_\_\_\_ Date \_\_\_\_\_

Approval Supported  Approval Not Supported

**C. Signature of Dept. Chair of Student's Major** \_\_\_\_\_

Print Name \_\_\_\_\_ Date \_\_\_\_\_

Approval Supported  Approval Not Supported

**D. Signature of Dean of School/College of Student's Major** \_\_\_\_\_

Print Name \_\_\_\_\_ Date \_\_\_\_\_

Approval Supported  Approval Not Supported

**5. GRADUATION APPLICATION.** The graduation appeals committee prefers to have a completed and approved graduation application on file with the Office of the Registrar. If you have not yet submitted a graduation application to the Registrar's Office, please do so before submitting this appeal.

**6. PETITION PACKET.** When your packet is complete, scan and email to [Graduation@umontana.edu](mailto:Graduation@umontana.edu) or submit a single copy of the completed packet to the Office of the Registrar.

**Important!** Only complete petition packages will be considered by the committee. Failure to complete steps 1-6 will result in the petition being returned to you. You will be notified by email of the results of your petition.

**Questions:** Please email [Graduation@umontana.edu](mailto:Graduation@umontana.edu) or call (406) 243-2421 or (406) 243-2422.

<p><b>STUDENT CHECKLIST</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Written Request</li> <li><input type="checkbox"/> Written Reasoning Summary</li> <li><input type="checkbox"/> Supporting Documentation/Letter(s) of Support</li> <li><input type="checkbox"/> Signatures</li> <li><input type="checkbox"/> Completed Packet Turned In</li> </ul>	<p><b>COMMITTEE CHECKLIST – for office use only</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Completed Packet</li> <li><input type="checkbox"/> Graduation Application</li> <li><input type="checkbox"/> Transcript</li> </ul>
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## Appendix K



### Major/Minor/Option Change Form

Student ID Number \_\_\_\_\_ Student Name \_\_\_\_\_

Student Phone \_\_\_\_\_ Last \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

- If you drop your Primary Major, you **must** add a new Primary Major.
- If you are a non-degree student, apply for admission through the Admissions Office to declare a Major.
- All signatures below must be from either the Dean, Department Chair, or Designee.

### ADD

### DROP

<b>Primary Major</b>	Major _____ Signature _____	Major _____ Signature _____
<b>Option or Concentration to Major</b>	Option _____ / _____ Signature _____	Option _____ / _____ Signature _____
<b>Second/Third Major</b>	Major _____ Signature _____	Major _____ Signature _____
<b>Minor</b>	Minor _____ Signature _____	Minor _____ Signature _____

Major/Minor/Option Changes will be effective for the current semester **only if submitted during the first 15 days of instruction**, otherwise they will be effective for the next semester.

Students: retain the yellow copy as your receipt until you see the change in CyberBear.

**Obtain the required signatures and return to the Registration Counter in Griz Central.** The back copy is for the student's records.

**SEMESTER WITHDRAWAL FORM***Submit this form to the Registrar's Office*

Withdrawal may not be your only or best option. Please review the website or see a Withdrawal Coordinator for more information. <http://www.umt.edu/withdrawal>

Circle Semester & Indicate Year: Autumn Spring Summer 20\_\_

790-\_\_\_\_ - \_\_\_\_ Name (print) \_\_\_\_\_  
 Student ID# Last First Middle

Forwarding Address: \_\_\_\_\_  
 Street Address City State Zip Code Phone#

Reason for Withdrawal: \_\_\_\_ Academic \_\_\_\_ Health \_\_\_\_ Financial \_\_\_\_ Work \_\_\_\_ Military \_\_\_\_ Family \_\_\_\_ Personal

**MONTANA UNIVERSITY SYSTEM POLICY AND SCHEDULE:** <http://mus.edu/borpol/bor900/9407.htm>

**DEFERRED PAYMENT PLAN:**

Are you on the Deferred Payment Plan: \_\_\_\_ Yes \_\_\_\_ No

You are responsible for any remaining payments on your deferred payment plan. Any refund of fees will be applied to your deferred payment plan. Any refund of fees will take 4 to 5 weeks to process. For additional information contact Business Services at (406) 243-2223 or [UM.Statements@mso.umt.edu](mailto:UM.Statements@mso.umt.edu).

**FINANCIAL AID:**

Did you receive Federal Financial Aid for this semester? \_\_\_\_ Yes \_\_\_\_ No

Using a pro-rated formula, refunds are returned to the financial aid programs before students receive any cash. In addition, you may owe repayment out of your pocket for unearned financial aid.

- I understand that 1) I may owe a repayment for received aid; 2) any aid not yet received for this current semester will be cancelled; and 3) aid for future semesters will be cancelled. If I choose to return to school and re-apply for financial aid, I must contact the Financial Aid Office and meet the conditions for reinstatement as explained in the Satisfactory Academic Progress Policy for Financial Aid at [www.umt.edu/finaid](http://www.umt.edu/finaid). Reinstatements of financial aid petitions are available in the Financial Aid Office or at [www.umt.edu/finaid](http://www.umt.edu/finaid) using the link "Maintaining Eligibility".

**VETERAN'S BENEFITS:**

Did you receive Veteran Benefits for this semester? \_\_\_\_ Yes \_\_\_\_ No

Students receiving Veteran's benefits must obtain the signature of the Veteran's (VA) Coordinator in the Registrar's Office.

- I met with the VA Coordinator (Registrar's Office, EL 201) and understand the consequences of my withdrawal on my benefits.

VA Coordinator's Signature \_\_\_\_\_

Are you a U.S. Citizen? \_\_\_\_ Yes \_\_\_\_ No

If you are not a U.S. Citizen, Foreign Student Service's Director Signature required. FSSS Director Signature \_\_\_\_\_

Do you live in student housing (residence halls, family housing, Lewis & Clark, etc.)? \_\_\_\_ Yes \_\_\_\_ No

If yes, you must contact Residence Halls/Family Housing.

Do you have health insurance through The University of Montana? \_\_\_\_ Yes \_\_\_\_ No

*My signature on this form is my official notification of my intent to withdraw from all classes at The University of Montana.*

Signature \_\_\_\_\_

**OFFICE USE**

Academic Course Load

Processed By: \_\_\_\_\_

Mailed or Obtained (date) \_\_\_\_\_

Comments:

Withdrawal Coordinator \_\_\_\_\_ Date \_\_\_\_\_

Official WD Date



# Appeal of Suspension

---

Name: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 \_\_\_\_\_

Student ID # \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Date: \_\_\_\_\_

In compliance with Board of Regents Policy 301.9, the University of Montana requires a semester of non-attendance following an Academic Suspension. Students may appeal a Suspension in cases where there are compelling and documented circumstances. Complete the questions below to the best of your ability. Attach additional pages as necessary.

1. How have you demonstrated your ability to be successful at UM? List, with most recent semester first, the number of credits attempted and completed each semester, along with the earned GPA. Place an asterisk next to any semester above 2.00.

Term	Credits Attempted	Credits Completed	Term GPA
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

2. What were the specific issues that impacted your ability to be successful last semester? Any relevant documentation should be attached. If it is of a sensitive or confidential nature, please enclose documentation in a sealed envelope with your name, 790# and "Confidential" marked clearly on it.
3. Please describe and/or document how those issues have been resolved.
4. What is your two-semester plan for returning to Good Academic Standing? Include a list of planned courses and any campus resources you intend to utilize.

\_\_\_\_\_  
 Signature of Academic Advisor

\_\_\_\_\_  
 Date

- Form continued on reverse -





Date: \_\_\_\_\_

**Reinstatement Plan for Students on Academic Suspension**

(Complete this form with an advisor and present it, with a transcript, at your reinstatement meeting with the Dean.)

Name \_\_\_\_\_ Student ID# \_\_\_\_\_

Address \_\_\_\_\_  
 (city) (state) (zip)

Phone \_\_\_\_\_ Email address \_\_\_\_\_

Major \_\_\_\_\_ Advisor \_\_\_\_\_

Last Semester of Attendance \_\_\_\_\_

Status:       Academic Suspension       Financial Aid Suspension  
 (all financial aid matters handled by Financial Aid Office)

**As a student who has experienced academic difficulty and has been suspended, I understand that my first goal is to provide a plan for my academic success. I understand and agree that my academic success is dependent on my efforts to achieve the expected outcomes of each course and that I must maintain a minimum GPA of 2.0 each semester. I agree with, and will abide by, the following plan to enhance my academic opportunities at The University of Montana-Missoula.**

I will take a course load of no more than \_\_\_\_\_ credit hours for \_\_\_\_\_ semester.

I will enroll in the following courses (Note which are repeats). **Registering for other courses and/or failure to register for agreed courses could jeopardize future academic reinstatement:**

\_\_\_\_\_  
 \_\_\_\_\_

I will attend all classes for the semester (except for emergencies).

I will seek the following tutoring resource(s) for the following courses:

Writing Center \_\_\_\_\_       TRIO SSS \_\_\_\_\_  
 Math Tutoring \_\_\_\_\_       Study Jam \_\_\_\_\_

I will enroll in one or more of the following classes/workshops (check all that apply):

M065 – Pre-Algebra       C&I 160 – Learning Strategies  
 M 090 - Introductory Algebra       WRIT 095 – Basic Composition  
 Test Anxiety Workshop       Take ALEKS Math Placement Exam  
 Take Writing Placement Exam

I will consider limiting my work schedule to \_\_\_\_\_ hours per week.

I will contact the following services to see if I may be eligible for additional assistance:

- American Indian Student Services – Payne Family Native American Center (243-6306)
- Career Services – Lommasson 154 (243-2022)
- Counseling Services – 634 Eddy (243-4711)
- Disability Services for Students (DSS) – Lommasson 154 (243-2243)
- Financial Aid Office – Lommasson Center, Griz Central (243-5373)
- Financial Education Program – Lommasson Center, Griz Central (243-6016)
- Registration Counter – Lommasson Center, Griz Central (243-6077)
- TRIO SSS (Student Support Services) – Lommasson 180 (243-5032)
- Veterans Education and Transition Services – 1000 E. Beckwith (243-2744)

Finally, I will:

Contact my advisor if I experience any difficulty this semester.

Contact my instructors about my progress in all of my classes at mid-term and one other time prior to the end of the semester.

Meet with my advisor regularly for progress updates during the following months: (i.e. September for class and schedule update, October for mid-term grade report, November for Priority Registration)

\_\_\_\_\_

**I agree to complete the items checked above. If I do not meet these responsibilities, I will jeopardize my continued enrollment at The University of Montana-Missoula.**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Advisor Signature

\_\_\_\_\_  
Date

**Administrative Review:**

Reinstatement Plan approved  Reinstated for (semester): \_\_\_\_\_

Revise Reinstatement Plan and resubmit

Comments:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Signature of Dean/Associate Dean (or designee)

\_\_\_\_\_  
Date

**Tutoring is available through:**

Study Jam:	UC Commons (243-5672)
TRIO SSS:	Lommasson 154 (243-5032)
Writing Center:	Liberal Arts 144 (243-2266)
Math Tutoring:	Mansfield Library Main Floor or Math Building Rm 011 (243-5672)
Departmental Tutoring:	Academic Departments (availability varies)

Appendix O



## Request for Academic Forgiveness

(See the next page for information outlining the University's *Academic Forgiveness Program* policy)

Identification:		
Student (Full legal Name)		
Student ID (790) Number	790 - -	
Information:		
1. Date of re-entry as a student at The University of Montana – Missoula (You must have been out of attendance for a minimum of three years)		
2. Number of credits completed since re-entering The University of Montana – Missoula (Must be at least 30 credits)		
3. Cumulative GPA for work since re-entering The University of Montana – Missoula (Must be $\geq 2.50$ . See worksheet)		
4. Previous and/or Maiden Name(s)		
5. Dates of prior enrollment(s) as a student at The University of Montana – Missoula		
6. For which semester or semesters of your prior enrollment at The University of Montana – Missoula are you requesting Academic Forgiveness?		
7. (Optional) Provide any additional information you would like considered on an attachment.↓		
Certification:		
I have read and understand the criteria for Academic Forgiveness. I understand that, if approved, my new GPA will exclude grades and credits for selected semester(s) earned at The University of Montana – Missoula. I understand that the forgiven coursework and grades <u>will remain on the transcript</u> , but cannot be used to fulfill any university requirements. Further, I understand that I may request Academic Forgiveness <u>one time only</u> .	Signature	Date
Endorsement		
Student's Advisor		

Allow 30 days for processing of this request

# The University of Montana

## Academic Forgiveness Policy

Effective Autumn Semester 2011

- A University of Montana – Missoula undergraduate who returns to the university after a minimum absence of three years and completes 30 credits of academic study with a minimum cumulative GPA of 2.5 is eligible for Academic Forgiveness.
- Academic Forgiveness allows a student who has met the requirements in statement #1 to select a prior semester or semesters he/she wishes to have excluded from calculation in the cumulative GPA. The semester(s) chosen must have occurred prior to his/her return to the university.
- Receiving Academic Forgiveness for a semester or semesters results in **all** credits and grades earned in the semester to be excluded from the student's GPA calculation. A student will not be allowed to select specific grades and credits to retain while excluding others earned within the same semester. The excluded courses and grades will remain on the transcript; however, they may not be used to fulfill any university requirements.
- Only The University of Montana – Missoula grades and credits will be excluded.
- A student will be granted Academic Forgiveness only one time.
- All excluded courses are still counted as attempted courses in determining if a student is meeting the Pace standard of the financial aid satisfactory academic progress (SAP) policy. If the terms being forgiven include courses a student previously passed the result could be that the student would now be out of compliance with the SAP policy and would have to do a financial aid appeal to have aid eligibility reinstated
- 
- Students who receive Academic Forgiveness will be bound by the University Catalog in effect at the time of their return to The University or any subsequent catalog in accordance with University policy.
- Students wishing to apply for Academic Forgiveness will contact the Registrar's Office for the appropriate form. The Registrar's Office will be responsible for verifying eligibility and notifying the student of approval.

- Other options exist for students who have not left the university such as course repeat, withdrawals, and other mechanisms listed under academic policies in the catalog.
- Students wishing to apply for Academic Forgiveness may obtain the form at the GrizCentral registration counter, or via the registrar's website at <http://www.umt.edu/registrar/>

Registrar's Office 23 August 2011