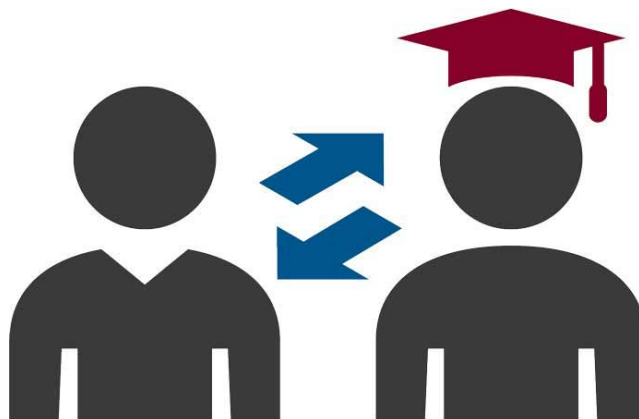




# Academic Advising for Retention

A Manual for Faculty at  
Shepherd University



## Table of Contents

<b>Importance of Good Advising .....</b>	<b>3</b>
<b>Role of the Faculty Advisor .....</b>	<b>4</b>
<b>Assigning Advisees .....</b>	<b>5</b>
<b>DegreeWorks .....</b>	<b>5</b>
<b>Calendar of Important Tasks .....</b>	<b>6</b>
<b>New Student-Advisee Introduction .....</b>	<b>8</b>
<b>Welcome Back to New Semester .....</b>	<b>9</b>
<b>Second Week Check-Ins .....</b>	<b>10</b>
<b>Campus Resources .....</b>	<b>11</b>
<b>Posting Beacon Notifications .....</b>	<b>12</b>
<b>Midterm Grades .....</b>	<b>16</b>
<b>Registering for Next Semester .....</b>	<b>18</b>
<b>Fall Advising Survey .....</b>	<b>21</b>
<b>Forms .....</b>	<b>22</b>
<a href="#"><u>Academic Change Form</u></a> .....	22
<a href="#"><u>Course Substitution or Waiver Form</u></a> .....	23
<a href="#"><u>Course Withdrawal Form</u></a> .....	24
Other Forms .....	25
<b>Petitioning for Exception to Academic Regulation .....</b>	<b>26</b>
<b>Financial Aid Questions .....</b>	<b>27</b>
<b>Athletic Eligibility .....</b>	<b>28</b>

## Importance of Good Advising

*Effective retention programs have come to understand that academic advising is at the very core of successful institutional efforts to educate and retain students.*

Vincent Tinto, 1993

*Frequent faculty-student contact in and out of the classroom is the most important factor in student motivation and involvement.*

Arthur Chickering and Zelda Gamson, 1995

*Academic advising “provides perhaps the only opportunity for all students to develop a personal, consistent relationship with someone in the institution who cares about them.”*

Jane Drake, 2016

*Academic advising...is now crucial if institutions are to achieve goals of persistence and timely graduation, in addition to the humane goals of student self-realization and growth.*

Carolyn Thomas (NACADA), 2017

Shepherd University values each and every student and takes pride in fostering “lifelong learning and success in [students’] chosen pursuits.” Effective academic advising and faculty mentorship is critical in ensuring the retention, graduation, and goal attainment of our students.

*Shepherd Students Succeed!*



## **Role of the Faculty Advisor**

Faculty Advisors play a critical role in promoting student success at Shepherd University by:

1. Providing academic advising and support to assigned advisees pursuing majors within their departments or schools.
2. Helping students develop educational plans and assisting them in the selection of appropriate courses.
3. Assisting students in navigating student information systems that track academic progress (e.g., DegreeWorks, RAIL)
4. Maintaining knowledge of all aspects of advising, including core curriculum and major specific requirements, pre-requisites, sequencing of coursework, academic calendars, registration procedures, etc.
5. Being available to students to respond to questions and refer them to needed resources (e.g., tutoring, financial aid, accessibility services, counseling, etc.)
6. Monitoring students' progress toward degree completion and providing intervention when needed.
7. Clarifying academic policies, procedures, and deadlines.
8. Maintaining professional integrity and confidentiality in advising.
9. Serving as a mentor and guiding students to find additional mentors.

## Assigning Advisees

Faculty at Shepherd University are not assigned advisees until they successfully complete Advisor Training as part of the New Faculty Learning Community (NFLC). During NFLC, new faculty are encouraged to shadow colleagues during advising appointments and study the curriculum of their program(s). Department Chairs are encouraged to assign mostly first-year students as advisees for new faculty advisors, because a focus on core classes with less pressure to guarantee all requirements are complete for graduation allows new advisors to ease into the role.

New advisors should be assured that they have departmental mentors and that staff in the Advising Assistance Center are only a phone call away!

## DegreeWorks

DegreeWorks is a highly intuitive and user-friendly degree audit tool for students and their advisors, providing essential and timely information to help keep students on track to complete their degree. DegreeWorks can be accessed through RAIL and should be used by students in Catalogs dated 2020 and after. Any student who is under an older Catalog (2019 and before) will need to use the degree evaluation tool in RAIL. For those new to DegreeWorks, there are resources (i.e., manual and videos) in the “DegreeWorksTraining” folder on BrightSpace. Anyone seeking additional training should contact staff in the Advising Assistance Center. They will be happy to assist you.

# Calendar of Important Tasks

## Fall Semester

### August

Send Introductory Email to New Advisees with office hours and contact information

Send “Welcome Back” Email to Continuing Advisees with office hours and contact information

### September

Send “Check-In” Email to Advisees

Send Beacon Notifications for Students who Present Concerns as Early as Possible.

Reach out to Advisees who Received Beacon Notifications

### October

Send Emails to Advisees about Midterm Grades

Prepare for Advising/Registration for Spring Semester

### November

Reach out to Advisees who Have not Registered for Spring

### December

Review Final Semester Grades and Reach Out to Students. Congratulate Those Who Have Demonstrated Success and Offer Guidance to Those Who May Need It.



## Spring Semester

### January

Send Introductory Email to New Advisees with Office Hours and Contact Information

Send “Welcome Back” Email to Continuing Advisees with Office Hours and Contact Information

Confirm Graduating Advisees are Nearing Completion

### February

Send “Check-In” Email to Advisees

Send Beacon Notifications for Students who Present Concerns as Early as Possible.

Reach out to Advisees who Received Beacon Notifications

### March

Send Emails to Advisees about Midterm Grades

Prepare for Advising/Registration for Fall Semester

### April

Reach out to Advisees Who Have Not Registered for Fall

### May

Review Final Semester Grades and Reach Out to Students. Congratulate Those Who Have Demonstrated Success and Offer Guidance to Those Who May Need It.

Send Congratulations to Graduating Advisees



## New Student-Advisee Introduction

The first two weeks of classes are critical for student retention. Students need to feel valued and supported to develop a sense of belonging. A message from an academic advisor will go a long way in putting minds at ease. Advisors may have met most of their advisees during the welcoming events on the day of Convocation, but some of these students may lack the courage to seek answers from strangers and may feel lost. Department Chairs will provide faculty with a list of their new advisees at the start of the semester. A simple email, such as the one below, should be sent to establish the Advisor-Student relationship. If sent within the first week of classes (i.e., drop/add week), advisors may also offer assistance with schedule adjustments and inform them of the drop deadline (i.e., first Friday of the semester).

Hello *[STUDENT NAME]*,

*Welcome to Shepherd University! You are now a part of the Ram Family! I will be your academic advisor as you pursue your Bachelor's in [DEGREE PROGRAM]. If you have any questions about your coursework and your educational path, don't hesitate to reach out. My office is located in [BUILDING/ROOM #] and my scheduled office hours are [OFFICE HOURS]. If you would like to meet but these times are not convenient, please give me a call [304.876.####] or send me an email [\_\_\_\_@shepherd.edu] and we will find a time that works. We will be meeting in [October/March] to schedule classes for your [Spring/Fall] semester, but in the meantime, let me know if you have any questions or concerns. I look forward to working with you and helping you achieve your academic goals!*



## Welcome Back to a New Semester

Reminding students that they still have people who care about their progress fosters persistence and retention. Messages from academic advisors provide that “welcome back” each semester and help students feel valued and belonging to their department/school. A simple email, such as the one below, should be sent to continuing student-advisees to remind them that their advisors are still available as a resource. If sent within the first week of classes, a reminder of the drop deadline on Friday would also be beneficial.

Hello *[STUDENT NAME]*,

*I hope that you had an enjoyable and relaxing [Summer/Winter] break and that you are recharged for success in the new semester. As your academic advisor, I am here if you have any questions about your coursework and your educational path. As you know, my office is located in [BUILDING/ROOM #]. My scheduled office hours this semester are [OFFICE HOURS]. If you would like to meet but these times are not convenient, please give me a call [304.876.####] or send me an email [\_\_\_\_@shepherd.edu] and we will find a time that works. We will be meeting in [October/March] to schedule classes for your [Spring/Fall] semester, but in the meantime, let me know if you have any questions or concerns. Again, welcome home to Shepherd, and here's to a GREAT semester!*

## Second Week Check-Ins

After the second week of classes, it is recommended that advisors check in with their advisees. If students are beginning to struggle, intrusive/proactive advising with action-oriented strategies might give the students enough time to turn the tide, get back on track, and persist. Offering support and suggesting resources is beneficial to all students. A simple email, such as the one below, should be sent to advisees after the second week of classes in order to allow students the time to reflect and refocus.

*Hello Advisees,*

*I hope that your semester is off to a great start, you are attending all of your classes, and you have kept up with all of your studies and deadlines. Success in the first couple of weeks sets you up for success all semester. If you are struggling with any of your classes, don't wait until it is too late. Be aware that support services are available! I have attached a list of campus resources. Use it to reach out for free peer tutoring in any subject, success coaching, counseling, goal-setting, and more. As your academic advisor, I am also here if you have any questions about your coursework and your educational path. Don't hesitate to let me know if I can be of any help.*

[ATTACH FORM FOUND [HERE](#)]

# CAMPUS RESOURCES



These are just some of the campus resources available to you at Shepherd University. Browse [shepherd.edu](https://www.shepherd.edu) to learn more. The Student Success Center can also help direct/connect you (information below).

## ACADEMIC SUPPORT CENTER

[egross@shepherd.edu](mailto:egross@shepherd.edu)

(304) 876-5221

<https://www.shepherd.edu/academic-support/>



Scarborough Library, ground level

The ASC is committed to enhancing your academic potential through free peer tutoring, learning skills instruction, and academic advising. Visit our site for tutoring options and availability including face-to-face and online options!

## ACCESSIBILITY SERVICES

[accessibility@shepherd.edu](mailto:accessibility@shepherd.edu)

304-876-5122

<https://www.shepherd.edu/accessibility>



Gardiner Hall, side entrance

The mission at Accessibility Services is to assist you with diverse needs to achieve your academic and social potential by facilitating the use of reasonable and documented accommodations.

## ADVISING ASSISTANCE CENTER

[advising@shepherd.edu](mailto:advising@shepherd.edu)

304-876-5317

<https://www.shepherd.edu/aac-students>



Scarborough Library, ground level

The AAC provides information about adding or dropping classes, answering catalog questions, completing Satisfactory Academic Progress (SAP) appeal forms, planning class schedules, navigating RAIL, requesting exceptions to academic regulations, and reading degree evaluations.

## COUNSELING SERVICES

[advising@shepherd.edu](mailto:advising@shepherd.edu)

304-876-5161

<https://www.shepherd.edu/counseling>



Gardiner Hall

Counseling Services is free, confidential, and short-term. Licensed clinicians are ready to listen with empathy, foster healthy coping skills, and promote social and academic success. Appointments can be made online or by phone.

## FINANCIAL AID

[faoweb@shepherd.edu](mailto:faoweb@shepherd.edu)

304-876-5470

<https://www.shepherd.edu/financialaid>



Gardiner Hall, side entrance

Financial Aid can help you learn to minimize your debt and teach you about being financially responsible. You can visit the office to discuss unexpected financial dilemmas, identify your realistic earning potential based on your major, and become aware of many other resources for your future.

## HEALTH CENTER

(304) 876-5161

<https://www.shepherd.edu/healthcenter/>



Gardiner Hall

Our mission is to support the personal growth and development of students by offering an integrated approach to address the physical as well as the emotional well-being of those needing our services.

## REGISTRAR

[register@shepherd.edu](mailto:register@shepherd.edu)

304-876-5463

<https://www.shepherd.edu/registrar>



Ikenberry Hall

The Registrar's office can assist with official academic record information, academic change forms, course substitutions, transfer approval forms, transcripts requests, course withdrawals, and full semester withdrawals.

## STUDENT SUCCESS CENTER

304-876-5214

<https://www.shepherd.edu/studentssuccess>



Student Center, Suite 122

We can provide you with individualized support and resources that focus on key components for success, including time management, study habits, connecting with resources, and much more. Schedule a one-to-one meeting with a Success Coach on our website or come by the SSC!

## Posting in Beacon

Beacon is Shepherd University's Early Alert System that connects the campus community to support students during their academic and personal journeys.

As a faculty member, sharing information about a student's experience, behavior, or decision the first few weeks of classes may impact the student's ability to recommit and recover their grades. Posting either an update or an alert (time-sensitive update) for missed assignments, poor attendance, and/or poor academic performance will notify that student's success network. Assigning a category to the notation will prompt action by a trained responder. The staff and faculty who are connected to the student on campus and in the system will widen the student's support net and increase their chances for success.

As an academic advisor, you are part of your advisees' success network and will receive a digest email of recent notifications within Beacon pertaining to their behavior or situations. You can view a student's specific notation and email the student, as well as view their course load, demographics, and more by logging into [Beacon](#) and viewing your list of advisees. This list is based on information provided in Banner.

Please note that Beacon provides an "Encouragement" notation that can be used to share positive messages and praise. Such messaging also fosters retention as recipients feel valued and noticed. The information on the following pages and on the Student Success Center [website](#) will guide you on how to use the Quick Notification Tool for posting information in Beacon. While the posts of faculty and advisors tend to focus on academic performance, it is equally valuable to share when a student appears to feel disconnected, need counseling or health services, or is struggling financially.

Remember, you are a connected member of your advisees' success network. If you read a notification about an advisee who may be struggling, it is recommended that you reach out and offer support, advice, and referral to relevant campus resources. It is incredibly beneficial for students to be made aware that their advisor cares about their well-being and success.

# BEACON



YOUR PIECE OF THE PUZZLE

## WHY BEACON MATTERS

**Beacon** is an early alert system that connects the campus community to assist students as they navigate their college journey to give them the best opportunity to persist and graduate. Beacon connects students with focused support from their success network of staff and faculty. Your efforts in raising awareness help us, as a Shepherd community, achieve this goal together.

Use these provided steps to post an **UPDATE** notation when sharing new, relevant and valuable information about a student's decisions, experience, progress, and/or needs.

Select **ALERT** when the information requires *timely action* by the student or the student's success network—ideally within 72 hours of a deadline or made aware of a particular issue or concern.

A team of responders will pick up the shared notation and triage to ensure the best course of action.

### Sharing Information

All Beacon tools (*Beacon*, *Faculty Experience*, and *Quick Notification Tool*) will require a secure login using your campus credentials (i.e. email address and password).

- The **campus community** can use the **Quick Notification Tool** to provide an encouragement, update, or alert notation.
- **Instructors** can log into **Beacon** or **Faculty** to view submitted notations on students within their courses along with responses from the student's success network.
- **Faculty Advisors** can log into **Beacon** to view submitted notations, responses, and student information (class schedule, demographics, contact information, etc.) about advisees.

## HOW TO POST A NOTIFICATION



### Quick Notification Tool

<https://www.shepherd.edu/studentsuccess/beacon-quick-notification-tool>



### Select Type of Notation

**UPDATE:** informs success network  
**ALERT:** requires immediate action  
**ENCOURAGEMENT:** shares positivity



### Select Student

Insert student's name, last name, or begin typing their email address to confirm the individual.



### Select Category

Assigned responders will address notices based on a **category**—a **crucial step** to provide students appropriate support.



### Provide Description

Provide details\* that may be important when addressing the student such as: course number, quantity, prior actions taken, and other key items.

*\*Aligned with FERPA guidelines*

### "I posted a notification. What's next?"

All notifications (i.e. Alerts, Updates, etc.) are viewed by Beacon Responders. **Action's taken are determined by the chosen category.**

Automated email notifications are sent when an Alert is lowered. Log into Beacon for more details.

**WANT MORE?**

<https://www.shepherd.edu/studentsuccess/beacon-resources>

Student Success Center x5214  
 Student Affairs x5030

The first element of change is  
**AWARENESS.**



# CATEGORIES AND RESPONDERS

## MISSED ASSIGNMENTS

Student Success Center (SSC)  
Coaches



### Is the student:

- missing deadlines to turn in assignments?
- consistently requesting additional time to complete assignments?
- having troubles navigating syllabus, Brightspace, or other programs?

## ATTENDANCE

Student Success Center (SSC)  
Coaches



### Is the student:

- missing three or more consecutive classes with no communication?
- not adhering to attendance policies outlined in your course syllabus?
- frequently showing up late?
- not communicating about expected absences?

**NOTE:** SU Attendance Policies can be found in the [Student Handbook](#). Also, the Intermittent Attendance accommodation allows for leniency in a professor's attendance policy due to a student's disability. More information can be found in the Intermittent Attendance Guidelines on the [Faculty Resources](#) page and by contacting [Accessibility Services](#).

## ACADEMIC PERFORMANCE

Academic Support Center (ASC)



### Is the student...

- in danger of failing the course?
- multiple exams/assignments turned in with little improvement?
- turning in work, but the quality is inadequate for course standards?
- in need of tutoring services?

**Note:** Performance may relate to the need for short-term or long-term accessibility accommodations.

## CONNECTEDNESS

Student Success Center (SSC) Coaches  
Accessibility Services



### Is the student:

- thinking of leaving Shepherd?
- showing signs of social isolation?
- expressing interest in getting involved?
- wanting to get involved with student community service events?
- wanting leadership training?
- possibly in need of short-term or long-term academic or residential accommodations?

## HEALTH & WELL-BEING

Intervention Team (BIT)



### Is there a possibility a student is:

- in need of clothing, housing, transportation, or is food insecure?
- needs a specific test from the Health Center? or physically ill?
- injured or recovering from an injury?
- experiencing a mental health crisis?
- reporting an accident or emergency?
- being harassed, bullied, or in an abusive situation?

**Note:** Student may have access to shared information. Do not share specific details. It is more helpful to say, "This student needs a reach out."

## FINANCIAL

Financial Aid Counselor



### Is the student...

- at risk for being dropped for non-payment?
- struggling to pay their tuition, fees, or course materials?
- In need of financial assistance to purchase academic supplies?
- wondering about a scholarship, grant, or other aid?

## ACADEMIC ADVISING

Faculty Advisor  
Advising Assistance Center (AAC)



### Is the student:

- navigating the catalog and not understanding degree requirements?
- exploring a major change?
- questioning their degree progression or course selection?
- debating to withdraw from a course, increase credit hours or go part-time?
- concerned about their GPA and its impact on their Academic Standing?
- requesting more information about the petition process for academic policy regulation exceptions?

## RECOMMEND WITHDRAWAL

Faculty Advisor



### Is the student:

- expressing their decision to withdraw from a course?
- struggling to obtain necessary signatures?
- needing assistance with the withdraw process?

### Are you suggesting a course withdrawal for this student?

**Note:** Be aware of what withdrawing from a course or semester means for the student's academic progress.

## REGISTRATION NOTICE

Office of the Registrar  
Student Success Center (SSC)



### Is the student:

- expressing their decision to withdraw from the University or multiple courses?
- thinking of leaving Shepherd, or sharing information or reasons related to leaving Shepherd?
- seeking an official withdrawal from the University?

INFORMATION CONTAINED IN BEACON IS GOVERNED BY FERPA.  
DISSEMINATION OR DUPLICATION OF INFORMATION IS STRICTLY PROHIBITED.

Shepherd  
UNIVERSITY





## "HOW SHOULD I SAY THIS?"

Use this page for guidance and support in phrasing the "details" shared in an Update or Alert per category—particularly notations that may contain sensitive information.



### • MISSED ASSIGNMENTS

- Student is falling behind on % of course work/# of assignments.
- Student has not turned in the first major assignment.

### • ATTENDANCE

- Student has not been present in class for # days and is at the maximum # of excused absences.
- Student has not provided required documentation for an excused absence.
- Student has not communicated with me in X days. I have reached out via email.

### • ACADEMIC PERFORMANCE

- Designated benchmarks are not being met as outlined in the class syllabus.
- The student has not passed the first or # of exam(s)/assignment(s)/project(s).

### • CONNECTEDNESS

- The student could benefit from a reach out from the Student Success Center.
- The student would benefit from learning more about upcoming campus events.
- A reach out from Accessibility Services regarding campus life accommodations would be beneficial.

### • HEALTH AND WELL-BEING

- This student is experiencing a family or personal emergency.
- Connecting the student to the Ram Pantry, clothing closet, etc. would be beneficial.
- Resources/a reach out from Health or Counseling services may be helpful.
- Connecting the student with the Student Conduct Coordinator could assist in their current situation.
- Resources/a reach out from the Title IX Coordinator may be helpful.

### • FINANCIAL

- The student is experiencing a financial hardship/concern.
- The student asked/may want information about grants and scholarships. A reach out from the Financial Aid Office would be helpful.
- Unforeseen circumstances have resulted in late payment.

### • ACADEMIC ADVISING

- A reach out from the Advising Assistance Center is necessary.
- An amended course schedule has been requested by the student.
- The student is not able to get in contact with their Academic Advisor.
- The student has expressed wanting to change their major, withdraw from a course, etc.
- A reach out from the AAC to discuss the students' academic standing has been requested.
- A reach out from the AAC has been requested by the student to speak about the petition process.
- I had a conversation with the student and they have concerns about the petition process.

### • RECOMMEND WITHDRAWAL

- I have tried to make contact with the student to provide signatures for withdrawal and I have not heard back.
- This student would benefit from having a conversation with their Academic Advisor about what withdrawal will mean for their academic outlook.

### • REGISTRATION STATUS

- Student may be at risk of leaving Shepherd.
- Student has expressed interest in withdrawing from the semester.

## Midterm Grades

Faculty are required to report midterm grades in all of their classes, and it is essential that these grades are meaningful and accurate. In order for the student's success network to respond accordingly and provide needed interventions, a true account of student progress needs to be reported. Submitting all incompletes (I) or all As that are not true reflections of progress is not helpful to students or their success networks. It is recommended that faculty provide multiple direct measures of student progress throughout the semester (e.g., essays, quizzes, assignments, presentations, etc.) because students question whether to persist, and advisors aren't sure how to advise when the midterm grade is based only on a single test or project. Short, relatively easy assignments are recommended early in the semester to help students get off to a strong start.

The Registrar will provide access to the grade reports of all advisees. Midterms will also appear in Beacon. Beacon administrators will send notifications to all students who have earned a D, I, IF or F at midterms. The Update will provide specific resources and tools for academic recovery. Faculty can submit an Alert using the Recommended Withdraw category, if the student is unable to recover and earn a passing grade. It is imperative that confidentiality be maintained. Advisors should review the grade reports and send notes of encouragement to each of their advisees. Individual emails can be sent directly through the Beacon system or bulk emails can be sent using the bcc feature in Outlook.

To the student doing well:

*As your academic advisor, I just reviewed your midterm grades. I am so impressed! Keep up the good work!*



To the student struggling in a single course:

*It looks like you may be struggling with [COURSE]. Have you spoken to the instructor about strategies for improvement? Have you signed up for peer tutoring in the Academic Support Center? Have you met with a success coach in the Student Success Center? There is still time to bring that grade up. Your other grades look good! Let me know if you have any questions.*

To the student struggling in all/most classes:

*As your academic advisor, I just reviewed your midterm grades, and I am concerned about your progress. Can we set up a time to meet? I hope you've spoken to your instructors and you have clear plans to recover, but if there's uncertainty, let's discuss your options. I'm committed to helping you succeed.*

## Registering for the Next Semester

In mid-October the Registrar's Office will provide access to a list of all advisees with their emails, dates/times they are permitted to register and their alternate PINs. Advisees must meet with advisors before receiving their PIN for registering. Advisors should not give advisees their PINs until their proposed schedule of classes has been built and approved. The Advising Assistance Center will send resources to aid advisors in messaging students and setting up advising appointments. Check the [Academic Calendar](#) on the Registrar's site for the two weeks of advising and the registration week and plan accordingly:

1. Block off advising times on your Outlook calendar. Thirty minutes per advisee is recommended if the caseload allows for it.
2. Send a bulk email to all of your advisees letting them know how they can sign up for an appointment. Some advisors have used online booking websites (e.g., Calendly) and others have uploaded a shared schedule on their OneDrive. If you post a sign-up sheet on your office door, please be aware that some students are not regularly on campus and may need a way to schedule via email. Never ask for private information (e.g., Shepherd ID, DOB) on a shared document.
3. Within that email or in a subsequent email, provide resources they will need to begin building their schedules and the expectations you have for them when you meet.
4. When you meet make sure that you have:
  - 1) Approved a schedule of classes
  - 2) Provided their PIN and DATE/TIME to register (and strongly encouraged them to register on time)
  - 3) Encouraged them to complete the Advising Survey (fall semester only); and
  - 4) Let them know they can contact you at any time if questions arise.

While advising, be aware of the student's class status and other notable information in Beacon because students' needs are often very different. It is also helpful to keep Beacon and the student's profile open during your advising meeting to share notable items and/or decisions.

**First-Year and Transfer Students:** These students may not be familiar with campus resources, and they may not have accessed DegreeWorks. When they entered Shepherd, they logged onto RAIL and registered, but they may not remember registration procedures. Walk them through accessing DegreeWorks, explain how they will be registering for classes, and ensure they are aware of campus resources.

**Sophomores:** As students are moving out of core classes and focusing more on major-specific classes, they may be questioning their choices in majors, minors, and careers. To benefit student retention, refer these questioning students to the Student Success Center, the Advising Assistance Center, and/or Career Services. These professionals will help students with goal setting and major exploration. Finding their passion, even if it involves leaving your major, is most beneficial to student retention.

**Juniors:** These students tend to understand registration procedures and university policies. Now it's important to discuss taking advantage of your department's high-impact practices: internships, service learning, and faculty-led research.

**Seniors:** The first semester of their senior year, advisors should help students plan the curriculum for the entire year to ensure they can complete all necessary coursework for the degree. They should remind students to apply for graduation the semester before they plan to graduate. Please refer seniors to the Office of Career Services for help with resume and cover letter writing, graduate school applications, and job searching. Please also encourage them to access [HANDSHAKE](#), the free job and internship portal.

**Sample Email to Advisees** (updated messaging will be sent from the AAC before each advising season):

ACADEMIC ADVISING: Wednesday, [MONTH/DATE]– [MONTH/DATE]

REGISTRATION WEEK: Monday, [MONTH/DATE] – Friday, [MONTH/DATE]

If you are receiving this email, I am your academic advisor and it is that time of year again! Time for academic advisement for the [FALL/SPRING YEAR] semester! You must secure the date/time of registration and your PIN from me before you would be able to register for classes. Advising appointments can be done in-person or virtually over Zoom. Please **choose an appointment** at the following link and I will send a confirmation (with a Zoom link, if requested) to your Shepherd email: [insert link to a calendar site or a shared doc]

To prepare for your advising appointment, please do the following:

1. If you entered Shepherd in the fall of 2020 or after, you should now be using DegreeWorks. For those new to DegreeWorks, watch [this video](#) to learn the basics. Those who entered Shepherd prior to 2020 should check their Catalog year on RAIL. If the Catalog is prior to 2020, you will need to continue using the Degree Evaluation tool.
2. Log into RAIL and access either **DegreeWorks** or **Degree Evaluation** (<http://www.shepherd.edu/rail>) to get an idea of the courses you still need to take.
3. Utilize the most recent [core curriculum worksheet](#) and/or the DegreeWorks audit to determine options in the core.
4. Using the appropriate degree audit tool and the core curriculum worksheet, examine [course offerings](#) for next semester to draft a schedule of classes. [IN SPRING ADD: Notice that the summer schedule is also posted; if you are considering taking courses this summer, we can also discuss those options when we meet].
5. Show up for your appointment! If you request a virtual appointment, try to be at a computer so that you are better able to see my shared screen.

Remember, the Advising Assistance Center in the lower level of the library can be a vital resource in assisting you with schedule planning.

I'm looking forward to our advising session!

## Fall Advising Survey

Every fall after students have met with advisors to plan their spring schedules, students will be asked via emails and campus flyers to complete an advising survey to rate their experience. Academic advisors are strongly encouraged to directly request that their advisees complete the survey. The response rate is higher when advisors make such personal requests. At the aggregate level, results help determine what is working well with our advising program. Faculty advisors are sent their individual results; these results can be used in Promotion and Tenure portfolios, award nominations, and annual reports.

### Advising Survey Questions:

#### STUDENT SELF-ASSESSMENT

- Q2. Have you met with your advisor?
- Q3. As an advisee I made appointment(s) to see my advisor
- Q4. As an advisee I kept appointment(s) to see my advisor
- Q5. As an advisee I was well prepared for my appointment(s)
- Q6. Please provide any explanation for your ratings.

#### ADVISING ASSESSMENT (Likert-scaled response categories)

- 1. My advisor is easy to get in touch with.
- 2. My advisor gives me an adequate amount of time when we meet.
- 3. My advisor encourages me to come by for help.
- 4. My advisor takes a personal interest in my academic goals.
- 5. My advisor encourages me to express my thoughts and feelings about my academic goals.
- 6. My advisor is a good listener.
- 7. My advisor gives me accurate information about course requirements.
- 8. My advisor helps me understand why required courses are important for my educational development and future plans.
- 9. My advisor considers my personal abilities, talents, and interests when advising me about courses or programs of study.
- 10. My advisor has assisted me in developing a long-term educational plan.
- 11. My advisor helps me connect with campus resources (e.g., Academic Support Center, Counseling Services, etc.).
- 12. My advisor helps me make important educational decisions (selecting elective courses, exploring academic majors/minors, etc.).
- 13. I would recommend my advisor to other students.
- Q14. Please provide any explanation for your ratings. Focus on the strengths of your advisor and the ways in which your advisor could improve.

## Forms

### Academic Change Form

The Academic Change Form allows a student to make the following change(s):

- Change their degree (e.g., from a B.A. to a B.S.)
- Change a Major or Add/Drop a Second Major
- Change to a Newer Catalog with Different Program Requirements
- Change Advisors
- Change a Minor or Add/Drop a Second Minor

While advisors should discuss the implications of any academic changes with their advisees, the goal is to retain students at Shepherd and help them to become successful. Helping them to find an educational path they are passionate about, even if it is not in the advisor's department, should be supported. And if students builds stronger connections with other faculty, requests to change advisors should not be taken as a personal slight. If any first-year students seem lost and unsure of their chosen major, please support their change to an Exploratory/Undeclared major and they can get additional support from professional advisors in the AAC to find a suitable major.

SHEPHERD UNIVERSITY UNDERGRADUATE ACADEMIC CHANGE FORM	
<b>INSTRUCTIONS</b> Complete the appropriate fields, obtain required signatures and return to the Office of the Registrar, Hensberry Hall. PLEASE PRINT.	
Last Name: _____	First Name: _____ M.I. _____ Student ID # _____
Email Address: _____@sums.shepherd.edu	
<b>ATTENTION ATHLETES</b> Participants in intercollegiate athletics must obtain approval of Athletic Director _____ Athletic Director Signature _____ Date _____	
<b>DEGREE</b> - <input type="checkbox"/> CHANGE DEGREE or <input type="checkbox"/> Add 2 <sup>nd</sup> Degree <u>or</u> <input type="checkbox"/> CONTINUE WITH CURRENT DEGREE Select Degree: <input type="checkbox"/> BA <input type="checkbox"/> BA ELEM <input type="checkbox"/> BA SECD <input type="checkbox"/> BFA <input type="checkbox"/> BS <input type="checkbox"/> BSN <input type="checkbox"/> BSW <input type="checkbox"/> BME <input type="checkbox"/> BMP <input type="checkbox"/> RBA	
<b>MAJOR</b> - Note: Changing your major may result in additional fees. <input type="checkbox"/> CHANGE Primary Major from _____ to _____ <input type="checkbox"/> CHANGE Concentration or teaching field from _____ to _____ <input type="checkbox"/> ADD 2 <sup>nd</sup> Major of _____ <input type="checkbox"/> DROP 2 <sup>nd</sup> Major of _____ <input type="checkbox"/> CHANGE 2 <sup>nd</sup> Major from _____ to _____ <input type="checkbox"/> CHANGE 2 <sup>nd</sup> Major Concentration or teaching field from _____ to _____	
<b>CATALOG</b> : (The catalog year used for program requirements) <input type="checkbox"/> No Change <input type="checkbox"/> Change from _____ to _____	
<b>ADVISOR</b> (must be assigned by Department Chair of new major) <input type="checkbox"/> New Advisor _____ <input type="checkbox"/> Current Advisor _____ Department Chair Signature _____ Date _____ (Required if new degree, major, advisor or teaching field)	
<b>MINOR</b> : Note: If pursuing <u>more than one major</u> , to which major is the minor to be added? <input type="checkbox"/> ADD Minor _____ <input type="checkbox"/> DROP Minor _____ <input type="checkbox"/> CHANGE Minor from _____ to _____ <input type="checkbox"/> ADD 2 <sup>nd</sup> Minor** _____ <input type="checkbox"/> DROP 2 <sup>nd</sup> Minor _____ <input type="checkbox"/> Change 2 <sup>nd</sup> Minor** from _____ to _____	
**Attention: or 2nd minor, or minor with a comprehensive major, requires the following: Signature: Advisor of Major _____ Date _____ Signature: Department Chair of Major _____ Date _____	
Select One: <input type="checkbox"/> I have applied for graduation: <input type="checkbox"/> May <input type="checkbox"/> August <input type="checkbox"/> December Year: _____ or <input type="checkbox"/> I have NOT applied for graduation. Anticipated graduation date: _____ Student Signature _____ Date _____	

## Course Substitution or Waiver Form

If a student has taken a course (e.g., transfer credits, special topics class, etc.) that could take the place of a required course in a curriculum, a course substitution form should be completed. Course substitution forms must be signed by the department chair of the required course; thus, a conversation with that chair should precede the completion of the form if there is any uncertainty. Once approved by the advisor and department chair, the form should be submitted to the Registrar's Office for processing; once processed, the exception will then appear on the DegreeWorks audit.

### Course Substitution or Waiver

Date:   
 Name:  Student ID:   
 Major:  Minor:   
 Teaching Field(s):  Catalog Year:

If you have applied for Graduation, enter date: May 20  August 20  December 20

*A justification for the substitution or waiver must be written for each request. A separate form must be used for each substitution except when the additional required course is under the same Department Chair. Incomplete forms will be returned.*

*NOTE: If you are using a substitution or waiver to satisfy a degree requirement, you may need to take additional credit hours to meet the minimum total hours required for a degree. Consult with your advisor.*

**REQUIRED COURSE**  
☐ *This is a Core Curriculum Requirement\**

**COURSE TO BE USED AS SUBSTITUTE**  
*(Write "waiver" if appropriate)*

*Include Subject Code and Course Number*

*Include Subject Code and Course Number as it appears on the Shepherd transcript; attach catalog description/ syllabus for transfer courses.*

Justification of Curriculum Amendment by Substitution (Required):

<b>REVIEWED BY:</b> <b>Advisor</b> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="display: flex; justify-content: space-between;"> <span>Signature</span> <span>Date</span> </div> <div style="margin-top: 10px;"> <input type="checkbox"/> I approve this request.  <input type="checkbox"/> I do NOT approve this request.         </div>	<b>Department Chair (of Required Course)</b> <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div> <div style="display: flex; justify-content: space-between;"> <span>Signature</span> <span>Date</span> </div> <div style="margin-top: 10px;"> <input type="checkbox"/> I approve this request.  <input type="checkbox"/> I do NOT approve this request.  <input type="checkbox"/> This transfer course substitution can articulate as a permanent transfer equivalency.         </div>
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\*Note: Core Curriculum substitutions (catalogs 2011 and later) may need further review by the Core Curriculum Committee.  
 Revised 02/24/2022

## Course Withdrawal Form

A student seeking to withdraw from a course must get signed approval from their academic advisor and the instructor of the course (a department chair can sign in lieu of the advisor or instructor if either is unavailable). The form needs to be submitted on/before the last day they are eligible to withdraw (see [ACADEMIC CALENDAR](#)). Advisors should verify that withdrawing students will still be full-time (12 credit hours minimum); if students fall below full-time status, they should be encouraged to speak with the Office of Financial Aid and/or an Athletic Compliance Director, if applicable.

1. USE BALL POINT PEN. PRESS HARD, YOU ARE MAKING 3 COPIES.
2. SECURE ADVISOR'S SIGNATURE
3. SECURE INSTRUCTOR(S) SIGNATURE(S)
4. PRESENT TO REGISTRAR'S OFFICE FOR RECEIPT
5. GRADE OF W IS RECORDED
6. NO REFUNDS



PERMIT TO WITHDRAW FROM  
CLASSES—AFTER ADD/DROP

### SHEPHERD UNIVERSITY

NAME \_\_\_\_\_  
FIRST MIDDLE LAST

STUDENT I.D. NUMBER \_\_\_\_\_

ORIGINAL HOURS REGISTERED FOR \_\_\_\_\_

NUMBER OF HOURS WITHDRAWING FROM \_\_\_\_\_

NEW TOTAL HOURS \_\_\_\_\_

ADVISOR'S SIGNATURE \_\_\_\_\_

ATHLETIC DIRECTOR'S SIGNATURE \_\_\_\_\_  
(Athletes Only)

BELOW FULL-TIME (12 HRS.) MAY AFFECT FINANCIAL AID, DEPENDENT  
INSURANCE COVERAGE, AND ATHLETIC ELIGIBILITY.

CRN	SUBJECT	COURSE NO.	SEC.	TITLE	CREDIT HOURS	INSTRUCTOR'S SIGNATURE	LAST DAY OF ATTENDANCE

STUDENT SIGNATURE \_\_\_\_\_ RECEIVED BY \_\_\_\_\_ DATE \_\_\_\_\_

ADVISOR—PINK  
STUDENT—CANARY  
REGISTRAR—WHITE



## Other Forms

While the Academic Change Form, the Course Substitution Form, and the Withdraw Form are the most common forms that advisors will employ, unique situations may require additional paperwork:

**Permission for Academic Overload:** Students are permitted to take up to 19 credit hours without seeking approval, but if they have a 3.0+ GPA, they may request permission to take up to 23 credits. To promote academic success, this should not be encouraged.

**Complete Withdrawal from Shepherd University:** Students wanting to withdraw from the entire semester are able to do so no later than 4:00 p.m. on the last day of classes.

**Transfer Approval Form:** Students need to get approval if they are interested in taking courses at another institution. This ensures that the classes will transfer back and be comparable to specified Shepherd courses.

Review other forms available on the [Office of the Registrar site](#). While other forms may not require an advisor's signature, advisors can direct students to needed forms and resources.



## Petitioning for Exception to Academic Regulation

Any student wanting to petition for an exception to academic regulation should be directed to the Advising Assistance Center in the lower-level of the library for consultation. AAC staff will explain what signatures and documentation are needed to complete a petition and discuss the merits of the appeal. The most common exceptions requested are:

- Late Adding/Dropping/Withdrawing from a course past a deadline
- Applying late to Graduate
- Taking more than 19 credits with a GPA lower than 3.0
- Taking a course elsewhere within their last 12 credits at Shepherd

When asked to sign both the petition and the letter of explanation as an advisor, it is important that the petition be seriously considered. If the student makes a strong case for granting the exception, the advisor should sign, check the box supporting the petition, and briefly explain why the petition is supported. For example, if the advisor is aware that the student has experienced personal crises that impacted academic performance, they may choose to support a late withdrawal. If there is not a compelling reason for granting the exception, the advisor should sign, check the box that they “Do Not Support,” and write a brief explanation. For example, if a student wants a late withdrawal at the end of the semester from a single class that they are failing, this could be a case of “grade shopping.” Not supporting a petition does not prevent the petition from being reviewed by the Admissions and Credits Committee.

## Financial Aid Questions

Academic Advisors do not have access to student financial records and should refer all students with questions about the impact of decisions on aid eligibility to the Office of Financial Aid

([faoweb@shepherd.edu](mailto:faoweb@shepherd.edu); 304.876.5470). It is valuable, however, for academic advisors to know general deadlines and strategies for maintaining financial aid.

### A Few Things Academic Advisors Need to Know about Financial Aid

1. The FAFSA (Free Application for Federal Student Aid) is available every year on October 1<sup>st</sup> (though in 2023 it will be delayed until December 31<sup>st</sup> due to implementing changes that simplify the form) for the upcoming academic year. It is available online at [www.fafsa.gov](http://www.fafsa.gov). Shepherd Title IV School code: 003822
2. The FAFSA must be completed each academic year to receive any Federal, State, and Institutional funds.
3. Verification has to be completed before we can award most aid. Students should always respond to requests for information in a timely fashion.
5. State Scholarship Renewals: Promise – Earn 15 credit hours during Fall/Spring semesters with a 3.0 cumulative GPA (2.75 GPA in first year). WV Higher Education Grant – Earn 12 credit hours during Fall/Spring semesters with a 2.0 GPA. Other WV State Scholarships – WVEST, WV Nursing, and Underwood – Smith Education Grant: <https://www.collegeforwv.com/>
6. Always check with Financial Aid before dropping or withdrawing from classes– Funds may be owed back as a result of these actions.
7. Loans and Pell Grants have yearly and lifetime limits.
8. To continue to receive Federal Aid, students must meet Satisfactory Academic Progress (SAP) each year: Undergraduates need to earn 70% of attempted credit hours with a cumulative Institutional and Overall GPA of 2.0. Graduates need to earn 75% of attempted credit hours with a cumulative Institutional and Overall GPA of 3.0. SAP is checked annually after the spring semester.
9. Always respond in a timely manner to requests from the Financial Aid Office to avoid delays in processing or award adjustments.



# ADVISING ATHLETES

Every population on campus has unique circumstances influencing their enrollment decisions and course selection. This packet was created to support our faculty and professional advisors when working with our student-athlete population. Each student may have a different path to graduation but all students must meet the same milestones to walk across the stage. Use this roadmap to aid our student-athletes in meeting their necessary milestones to accomplish their athletic and academic goals.

## FULL-TIME ENROLLMENT

- For student-athletes to participate in competition and/or practice, they must be **enrolled full-time during the term in which they want to participate.**
- **Seniors** who have **less than a full-time load of classes** to graduate can request approval to be part-time in their final academic term.
- Undergraduate students must be enrolled in 12 credits to be considered full-time.
- Graduate students must be enrolled in 9 credits to be considered full-time.

## GOOD ACADEMIC STANDING

- Student-athletes must be in **good academic standing with the University** to **compete** in outside competition **and/or travel** to competition away from campus.

## DECLARE A MAJOR/MINOR

- **Before their 5th full-time term of enrollment (at all institutions)**, student-athletes must declare a major and any required minor .
- **After their 5th full-time term of enrollment**, only credits toward their chosen degree (major and declared minor) will go toward the Progress toward Degree requirements (see below).

## PROGRESS TOWARD DEGREE (PTD)

- Credits earned during the **first four semesters of enrollment** can be earned toward any degree at Shepherd University; however, **after their 5th full-time term of enrollment**, only credits earned toward their declared degree (minor and major) will count toward the PTD requirements.
- To represent Shepherd in competition, student-athletes are **required to:**
  - **earn 24 credits annually**, which includes the fall, spring, and summer terms.
  - **18** of these credits must be earned **during the academic year** (fall and spring).
  - **9** of these credits must be earned **during the previous full-time academic term**. *If necessary, student-athletes are permitted to use 6 credits from the summer to meet the annual requirement.*

**The next page provides an overview of the general rules of PTD.**

# STAYING ELIGIBLE



At the end of each academic term, the Compliance Officer, Faculty Athletic Representative (FAR) and a representative of the Registrar's Office reviews the aforementioned elements of a student-athlete's academic eligibility to determine their eligibility to compete and travel. This process consists of reviewing a degree audit, transcript, and course schedule for the ensuing term.

## FALL ELIGIBILITY

To be eligible in the fall academic term, students must have earned the following credit hours as well as remain in **good academic standing** and hold a **2.0 GPA** for both their **Shepherd and Cumulative GPAs**.



24 earned credit hours between the previous Fall, Spring, & Summer



18 earned credit hours between the previous Fall and Spring



9 earned credit hours in the previous full-time term (i.e., Spring)



2.0 GPA or higher for both Shepherd and Cumulative GPAs



Good Academic Standing

## SPRING ELIGIBILITY

If a student was confirmed eligible in the Fall, then this student will have the below requirements to remain eligible in the Spring. Any student who did not meet the fall requirements are expected to meet the 24/18/9/GAS/GPA requirements during the preceding two full-time terms (spring, summer and fall).



9 earned credit hours in the previous full-time term (i.e., Fall)



2.0 GPA or higher for both Shepherd and Cumulative GPAs



Good Academic Standing

# ELEMENTS OF PTD

PROGRESS  
TOWARD  
DEGREE



Below are a few elements of the progress toward degree requirements that will help Advisors during conversations with our student-athletes.

## CORE, MINOR AND MAJOR REQUIREMENTS

- Credits earned toward the **core curriculum**, a **declared major**, or a **declared minor** can be **used toward** a student-athlete's PTD requirements.
  - **Note:** If the minor is voluntary and not required for graduation, then **only 6 credits per term** toward that minor will be counted toward PTD.

## REPEATS

- Credits are evaluated **at the time the student earned the credit** and **according to their declared program at the time** the student enrolled in the course.
- **It is not advised to repeat a class** unless the student-athlete **did not** earn a passing grade and **needs the course to graduate**.
- Credit will only be used in meeting PTD requirements once it has been **earned successfully**.
- Student-athletes should **contact the Compliance Office (304-876-5123)** prior to repeating a course or taking an "I" (incomplete) in a course.

## ELECTIVES

- **After the fifth term of enrollment, student-athletes should avoid taking electives** unless unless their declared academic program requires additional courses to meet the 120 credits for graduation.
- Credits outside of a student-athlete's declared major and required/declared minor may not count toward PTD. Student-athletes should **contact the Compliance Office** prior to taking classes that are "falling through" on your DegreeWorks or do not meet degree requirements indicated on Degree Works or a degree audit.

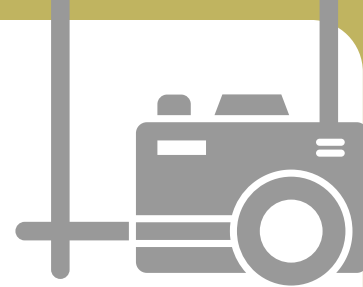
## COURSE SUBSTITUTIONS

- Advisors may provide a course substitution for an elective that meets a specific program requirement, **as long as it has been substituted for other students and/or will be substituted for other students** within the same academic program.
  - If the course substitution then deems the credits as meeting a requirement for graduation, then the credits will be counted toward the PTD requirements.

There are often exceptions to many rules, but it is encouraged to always advise student-athletes according to the rules.

When a circumstance arises where a student-athlete is deemed ineligible, it is the responsibility of the Compliance Officer to review their circumstance and determine if an exception can be applied.

# ELIGIBILITY SNAPSHOT



## TO BE ELIGIBLE FOR COMPETITION

ENROLL  
FULL-TIME IN  
UG (12) OR GR  
(9) CREDITS

BE IN GOOD  
ACADEMIC  
STANDING

HAVE A 2.0 GPA  
OR HIGHER  
(SHEPHERD &  
CUMULATIVE)

DECLARE  
DEGREE BEFORE  
5th TERM OF  
FULL-TIME  
ENROLLMENT

### IN FALL

EARN A MINIMUM  
OF **9 CREDIT**  
HOURS TOWARD  
CORE, DECLARED  
MAJOR, or  
DECLARED MINOR.

### IN SPRING

EARN A MINIMUM  
OF **9 CREDIT**  
HOURS TOWARD  
CORE, DECLARED  
MAJOR, or  
DECLARED MINOR.

### END OF YEAR

EARN A MINIMUM  
OF **24 CREDIT**  
HOURS TOWARD  
CORE, DECLARED  
MAJOR, or  
DECLARED MINOR.

Student-athletes can avoid needing to take summer classes to remain eligible by earning 12 credits per semester that meet progress toward degree (PTD) elements or that do not “fall through” on the Degree Works audit. Earning the minimum 9 credits per term will require the student to take 6 credits in the summer to meet 24 hours for the year. **Note:** When taking credits toward a voluntary minor, only 6 credits per term can be used to meet PTD requirements. No voluntary minor credits can be earned during the summer.

## STUDENT-ATHLETE REMINDERS

- Check Degree Works after registering for classes
- Ensure classes don’t “fall through”
- Know what classes require a “C” or higher
- Contact compliance before repeating a class
- Registrar’s Office must approve transfer credits
- Complete substitutions before end of term

CHECK YOUR TOTALS HERE

FALL	_____	9
SPRING	_____	9
SUMMER	_____	6
TOTAL	_____	24

# STUDENT-ATHLETE ELIGIBILITY RESOURCE



- Use your Degree Works to list Fall classes on the left and list Spring classes on the right.
- Write in credit hours in the square and star (\*) classes that are listed in the "Fall Through" section of your Degree Works audit. The starred credits will not count toward PTD.

## FALL







TOTAL FALL CREDITS

(DO NOT COUNT STARRED CREDITS)

## SPRING







TOTAL SPRING CREDITS

(DO NOT COUNT STARRED CREDITS)



Are you in Good Academic Standing?



Do you have a 2.0 GPA (SU and Cumulative)?



Did you earn 9 credits toward the core curriculum, your declared minor and/or major in last term?



Did you earn 24 credits toward the core curriculum, your declared minor and/or major?



**No** to any of these **questions**? Contact the Athletic Compliance Office and complete this section.

## ELIGIBILITY RECOVERY

Credits

Summer Classes




Reminder: Credits must count toward the core curriculum, your declared major or declared minor to meet PTD. Summer credits toward a voluntary minor can not be used in summer recovery.

CHECK YOUR TOTALS HERE

FALL

\_\_\_\_\_

9

SPRING

\_\_\_\_\_

9

SUMMER

\_\_\_\_\_

6

TOTAL

\_\_\_\_\_

24