

Assigning or Removing Advisors

OBJECTIVE:

This document explains the steps involved in assigning an academic department advisor to a student in PeopleSoft.

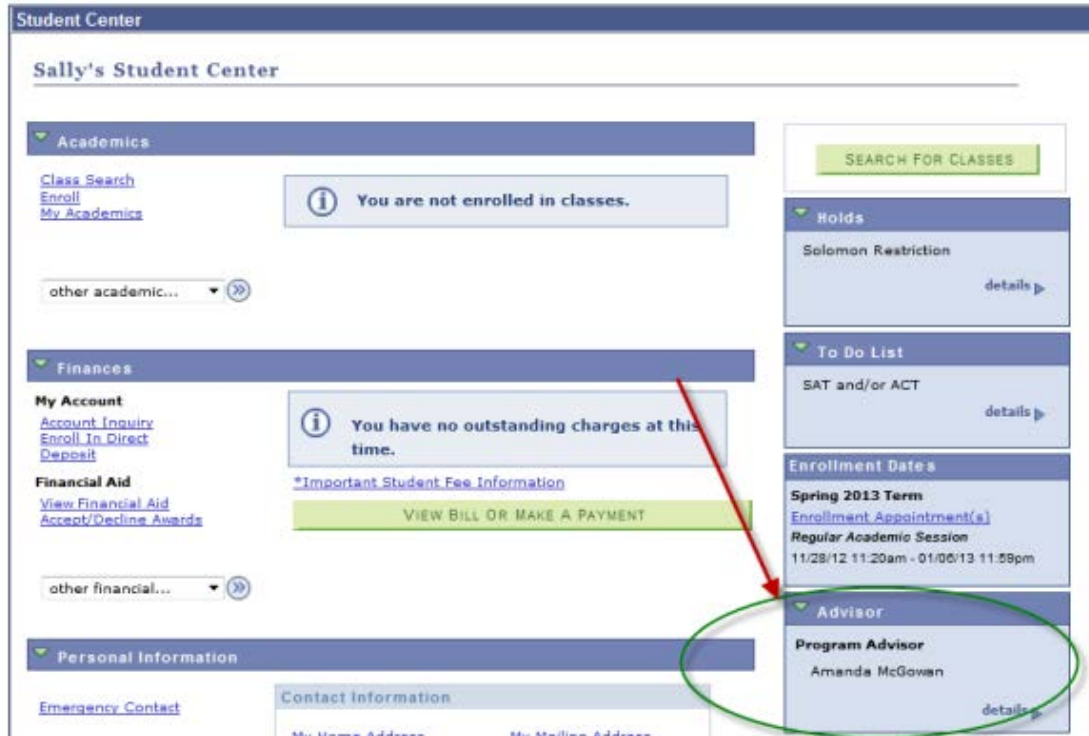
CONTENTS:

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LESSON 1: ADDING AN ADVISOR	4
LESSON 2: CHANGE AN ADVISOR WITHIN THE SAME DEPARTMENT (MAJOR OR MINOR) ..	9
LESSON 3: CHANGE AN ADVISOR FOR A STUDENT THAT HAS CHANGED MAJORS/MINORS	14
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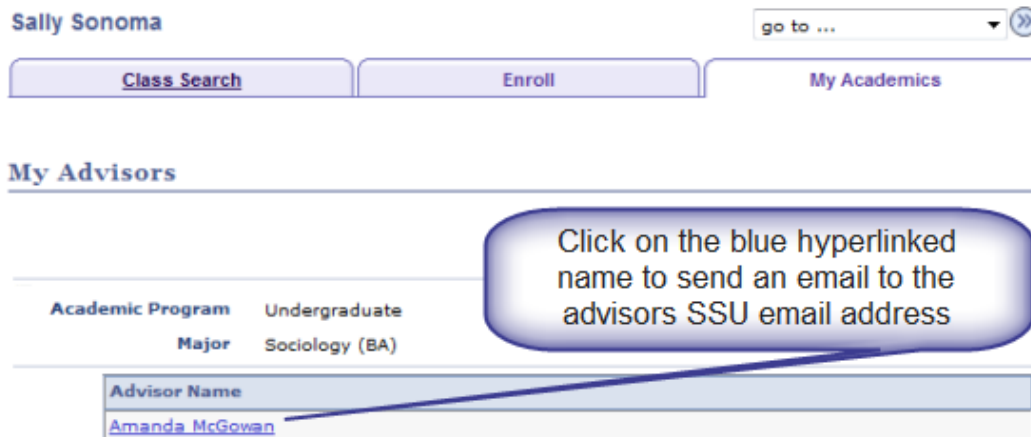
NEED ADDITIONAL INFORMATION?

If you have questions on this process please contact cms@sonoma.edu

Students can be assigned an advisor (or many advisors) which will display in their “Student Center” in MySSU



If they click on the “Details” link in the Advisor box, they’ll see which advisor goes with which Major or Minor.



Faculty and Staff Advisors can see which students are assigned to them by logging into MySSU and going to their “Advisor Center”.

Having students show on their “My Advisees” list gives them quick access to run an ARR, view a class schedule, or any other advising functions straight from this page:

Favorites | Main Menu > Self Service > Advisor Center > My Advisees



Amanda McGowan

Faculty Center | Advisor Center | Class Search

my advisees | student center | general info | transfer credit | academics

My Advisees

[VIEW DATA FOR OTHER STUDENTS](#)

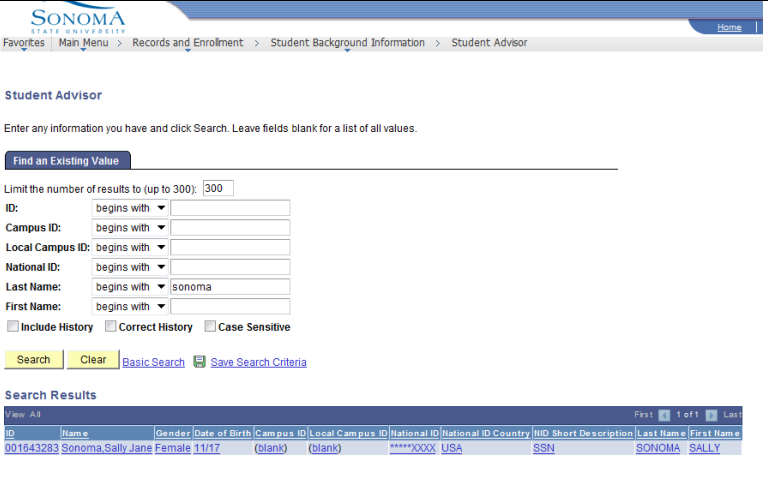
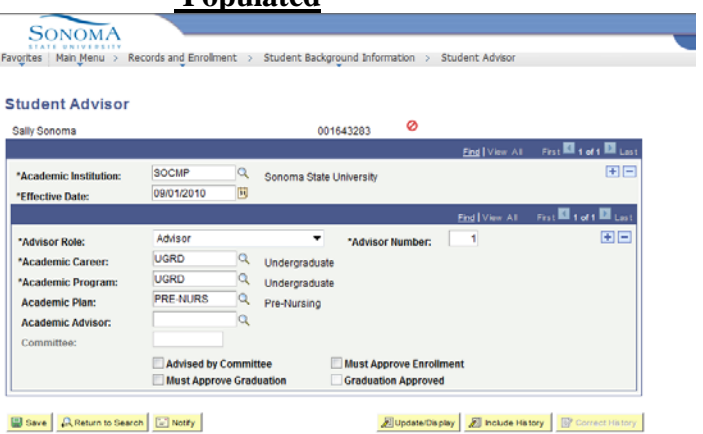
				Find  
	Notify	Name	ID	View Student Details
1	<input type="checkbox"/>	Sonoma, Sally Jane	001643283	View Student Details




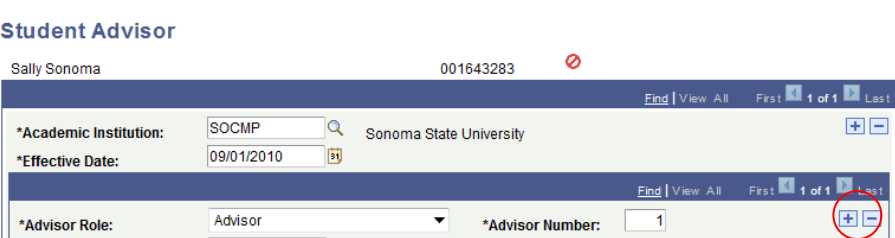
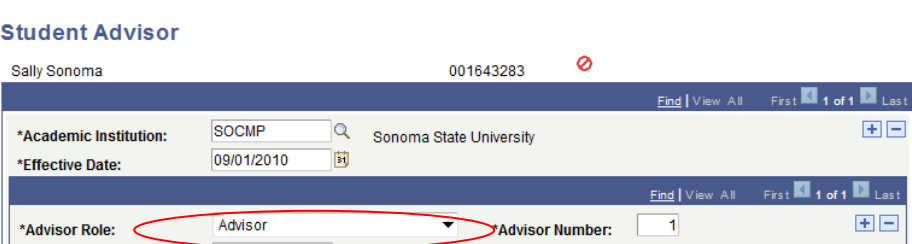

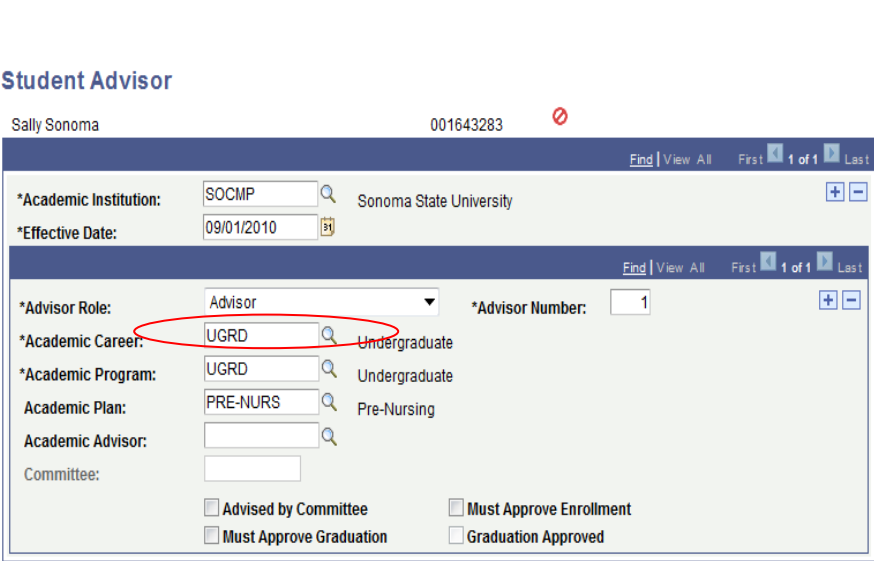
notify selected advisees | notify all advisees

Lesson 1: Adding an Advisor


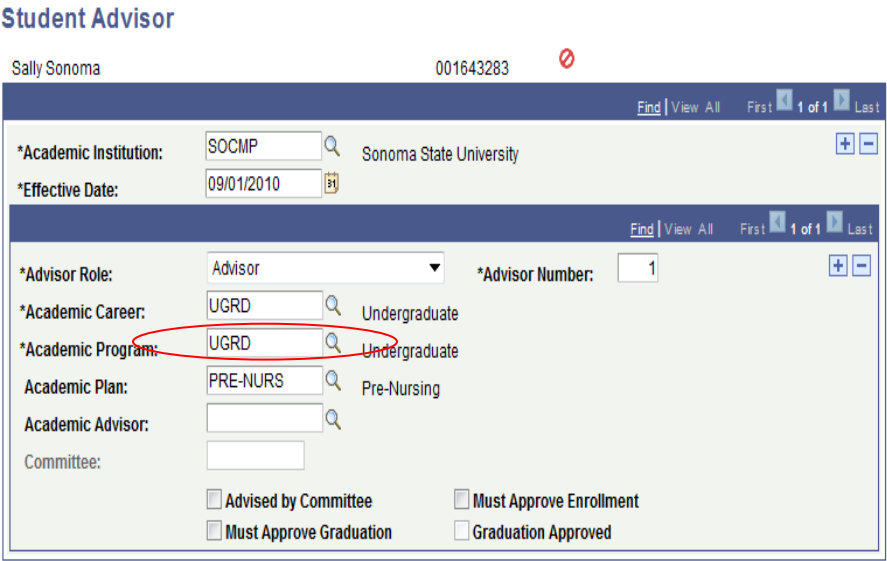

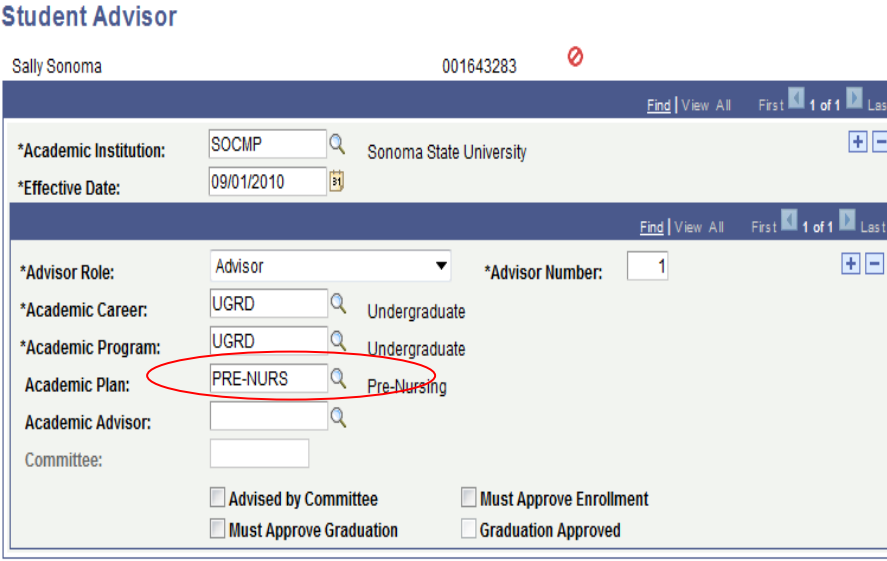
Navigation: Records and Enrollment > Student Background Information > Student Advisor

INTRODUCTION: The following table will outline the steps necessary to add an academic advisor to a student record.

Step	Action	Screenshot						
1	Navigate to the Student Advisor Page and search for the student.							
2	<table border="1"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The Student Advisor page is populated with data...</td> <td>Proceed to Step 3.</td> </tr> <tr> <td>The Student Advisor page is not populated with data...</td> <td>Proceed to Step 5.</td> </tr> </tbody> </table>	If	Then	The Student Advisor page is populated with data...	Proceed to Step 3.	The Student Advisor page is not populated with data...	Proceed to Step 5.	<p style="text-align: center;">Populated</p> 
If	Then							
The Student Advisor page is populated with data...	Proceed to Step 3.							
The Student Advisor page is not populated with data...	Proceed to Step 5.							

<p>3</p>	<p>Click on the plus sign  to the right of Academic Institution.</p>							
<p>4</p>	<p>Click on the plus sign  to the right of Advisor Number.</p>							
<p>5</p>	<p>Leave the Advisor Role as the default Advisor.</p>							
<p>6</p>	<p>Enter the Student's Academic Career.</p> <table border="1" data-bbox="180 1115 548 1341"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The student is an Undergraduate...</td> <td>Enter UGRD</td> </tr> <tr> <td>The student is a Post-baccalaureate...</td> <td>Enter PBAC</td> </tr> </tbody> </table> <p>Note: You can click on the magnifying glass icon to obtain a list of careers that student is active in. Select the career corresponding to the student's major. </p>	If	Then	The student is an Undergraduate...	Enter UGRD	The student is a Post-baccalaureate...	Enter PBAC	
If	Then							
The student is an Undergraduate...	Enter UGRD							
The student is a Post-baccalaureate...	Enter PBAC							

Academic Advising

<p>7</p> <p>Enter the Student's Academic Program.</p> <table border="1" data-bbox="180 401 542 621"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The student is an Undergraduate...</td> <td>Enter UGRD</td> </tr> <tr> <td>The student is a Post-baccalaureate...</td> <td>Enter PBAC</td> </tr> </tbody> </table> <p>Note: You can click on the magnifying glass icon to obtain a list of programs that student is active in. Select the program corresponding to the student's major. </p>	If	Then	The student is an Undergraduate...	Enter UGRD	The student is a Post-baccalaureate...	Enter PBAC	 <p>Student Advisor</p> <p>Sally Sonoma 001643283</p> <p>*Academic Institution: SOCMP Sonoma State University</p> <p>*Effective Date: 09/01/2010</p> <p>*Advisor Role: Advisor *Advisor Number: 1</p> <p>*Academic Career: UGRD Undergraduate</p> <p>*Academic Program: UGRD Undergraduate</p> <p>Academic Plan: PRE-NURS Pre-Nursing</p> <p>Academic Advisor: []</p> <p>Committee: []</p> <p><input type="checkbox"/> Advised by Committee <input type="checkbox"/> Must Approve Enrollment</p> <p><input type="checkbox"/> Must Approve Graduation <input type="checkbox"/> Graduation Approved</p> <p>Save Return to Search Notify Update/Display Include History Correct History</p>
If	Then						
The student is an Undergraduate...	Enter UGRD						
The student is a Post-baccalaureate...	Enter PBAC						
<p>8</p> <p>Enter the Student's Academic Plan (major).</p> <p>You can click on the magnifying glass icon to view list of majors currently attached to the student.</p> <p>The academic plan must be listed on their program/plan page or you won't be able to add an advisor at this step.</p> <p>Select the major for which the academic advisor is being added. </p>	 <p>Student Advisor</p> <p>Sally Sonoma 001643283</p> <p>*Academic Institution: SOCMP Sonoma State University</p> <p>*Effective Date: 09/01/2010</p> <p>*Advisor Role: Advisor *Advisor Number: 1</p> <p>*Academic Career: UGRD Undergraduate</p> <p>*Academic Program: UGRD Undergraduate</p> <p>Academic Plan: PRE-NURS Pre-Nursing</p> <p>Academic Advisor: []</p> <p>Committee: []</p> <p><input type="checkbox"/> Advised by Committee <input type="checkbox"/> Must Approve Enrollment</p> <p><input type="checkbox"/> Must Approve Graduation <input type="checkbox"/> Graduation Approved</p> <p>Save Return to Search Notify Update/Display Include History Correct History</p>						

9 Click on the magnifying glass next to Academic Advisor.

Student Advisor

Sally Sonoma 001643283

Find | View All First 1 of 1 Last

*Academic Institution: SOCMP Sonoma State University

*Effective Date: 09/01/2010

Find | View All First 1 of 1 Last

*Advisor Role: Advisor *Advisor Number: 1

*Academic Career: UGRD Undergraduate

*Academic Program: UGRD Undergraduate

Academic Plan: PRE-NURS Pre-Nursing

Academic Advisor:

Committee:

Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved

Save Return to Search Notify Update/Display Include History Correct History

10 Enter the last name of the advisor and click **Lookup**.

SONOMA STATE UNIVERSITY

Home Worklist MultiChannel Console Add to Favorites

Favorites | Main Menu | Records and Enrollment | Student Background Information | Student Advisor

New Window Help Customize Page

Advisor Search Page

Look Up Academic Advisor

Academic Institution: begins with SOCMP

Empl ID: begins with

Academic Organization: begins with

National ID: begins with

Campus ID: begins with

Last Name: begins with MCGOWAN

First Name: begins with

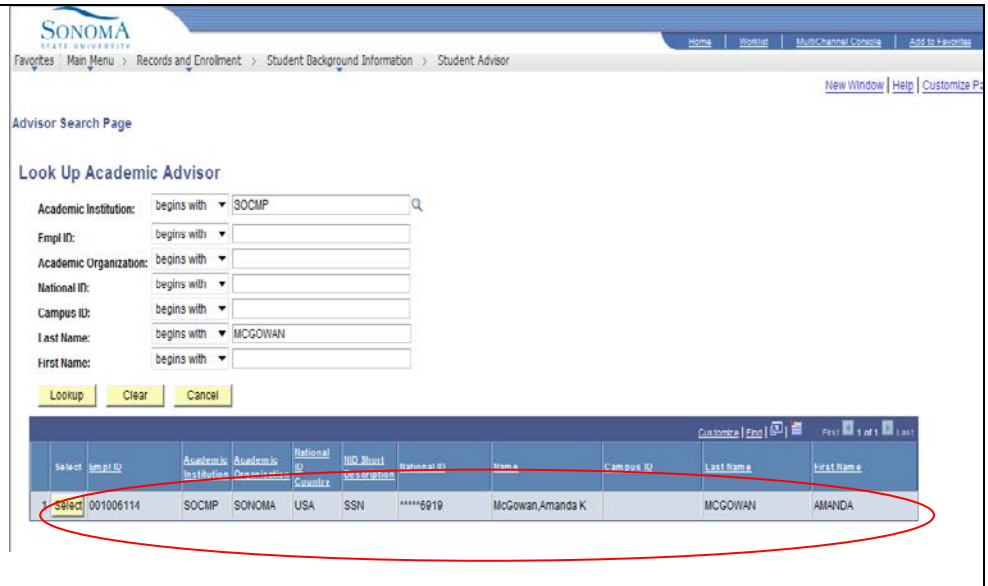
Lookup Clear Cancel

Select	Empl ID	Academic Institution	Academic Organization	National ID Country	NC Student Description	National ID	Name	Campus ID	Last Name	First Name
1	Select 001006114	SOCMP	SONOMA	USA	SSN	*****6919	McGowan, Amanda K		MCGOWAN	AMANDA

Academic Advising

11 A list of advisors with the requested last name will appear. Click on the yellow select button of the appropriate selection.

(If the desired advisor is not listed when you search, they may not be listed in the system as an advisor. Contact CMS.)



Advisor Search Page

Look Up Academic Advisor

Academic Institution: begins with SOCOMP

Empl ID: begins with

Academic Organization: begins with

National ID: begins with

Campus ID: begins with


Last Name: begins with MCGOWAN

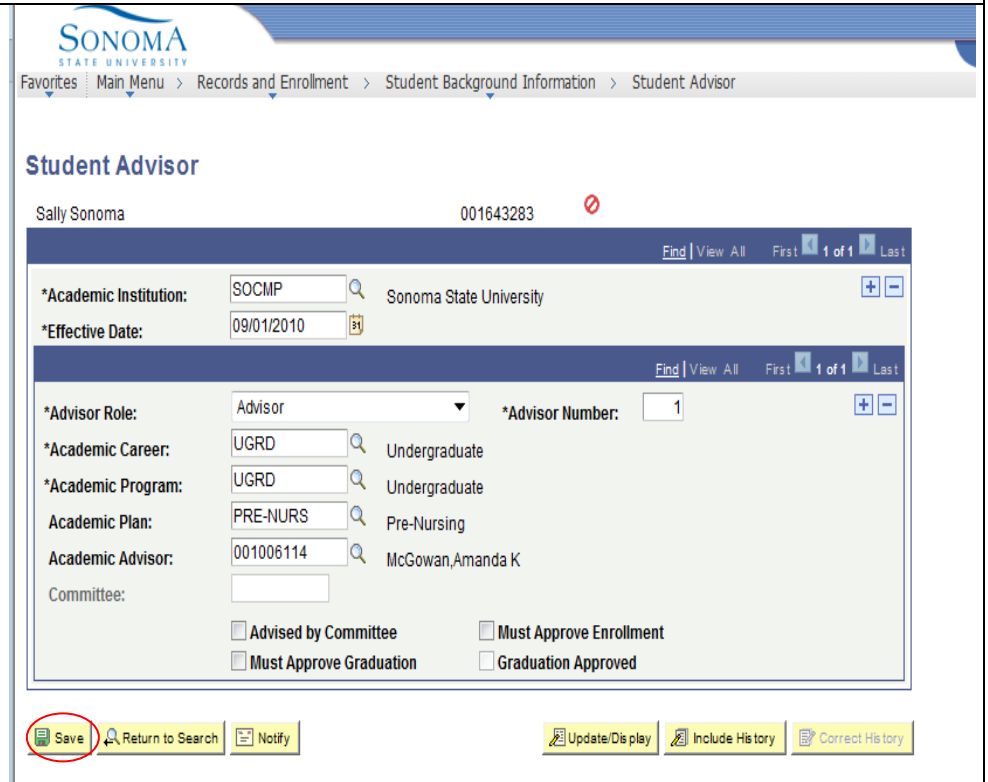
First Name: begins with

Lookup Clear Cancel

Select	Empl ID	Academic Institution	Academic Organization	National ID	SSN	Name	Campus ID	Last Name	First Name
<input type="button" value="select"/>	001006114	SOCMP	SONOMA	USA	SSN	****6919	McGowan,Amanda K	MCGOWAN	AMANDA

12 You have completed data entry with entry of the advisor, click **Save** at the bottom of the screen.





Student Advisor

Sally Sonoma 001643283

*Academic Institution: SOCMP Sonoma State University

*Effective Date: 09/01/2010

*Advisor Role: Advisor *Advisor Number: 1

*Academic Career: UGRD Undergraduate

*Academic Program: UGRD Undergraduate


Academic Plan: PRE-NURS Pre-Nursing

Academic Advisor: 001006114 McGowan,Amanda K

Committee:

Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved

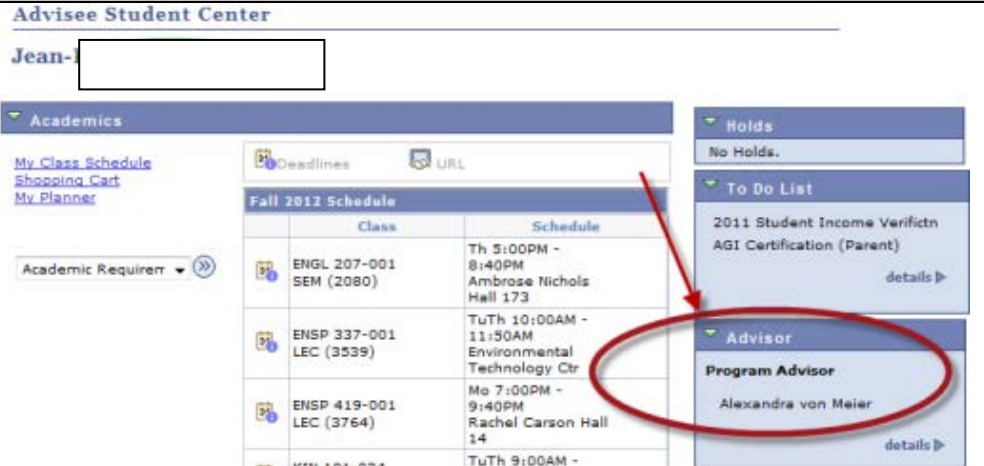
 Return to Search Notify Update/Display Include History Correct History

Academic Advising

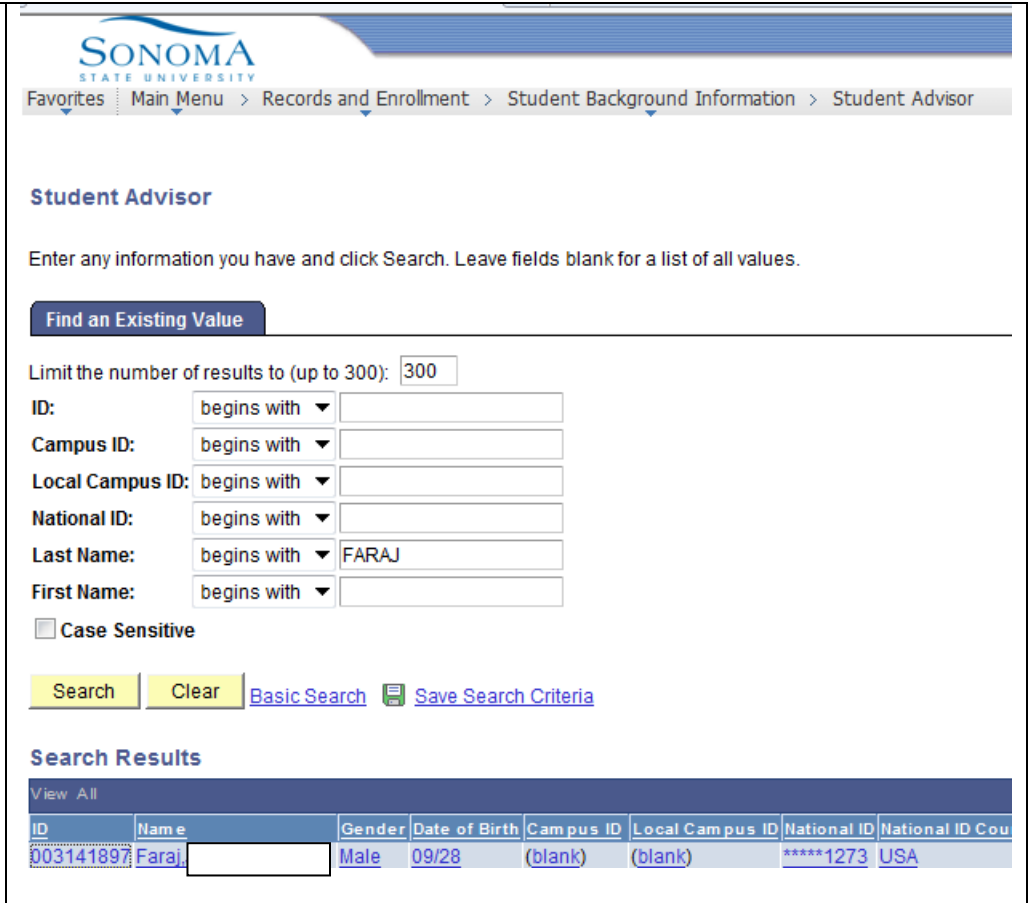
Lesson 2:

Navigation: Records and Enrollment > Student Background Information > Student Advisor

INTRODUCTION: The following will outline the steps necessary to **change** an academic advisor within the same department. In other words, student has an ENSP-BA major advisor assigned, and you are going to change it to a different ENSP-BA major advisor. If the student has changed majors, move to Lesson 3 instead.

Step	Action	Screenshot
1)	<p>Via the Student Services Center or Advisor Center, you can see who is currently listed as an advisor for your student.</p> <p>If you'd like to change the advisor, follow this lesson.</p>	

1 Navigate to the Student Advisor Page, input student's last name click on the student's hyperlink.



SONOMA STATE UNIVERSITY
 Favorites | Main Menu > Records and Enrollment > Student Background Information > Student Advisor

Student Advisor

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

ID:

Campus ID:

Local Campus ID:

National ID:

Last Name:

First Name:

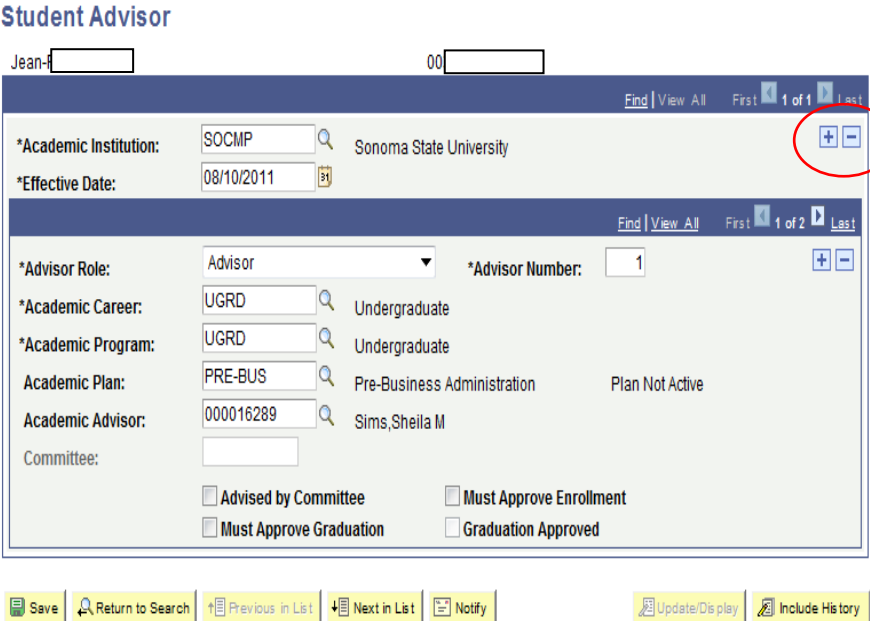
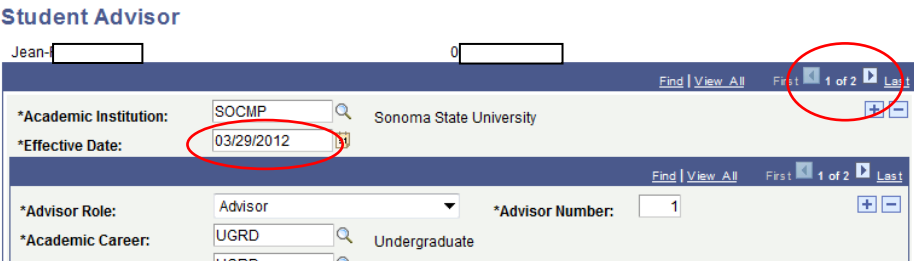
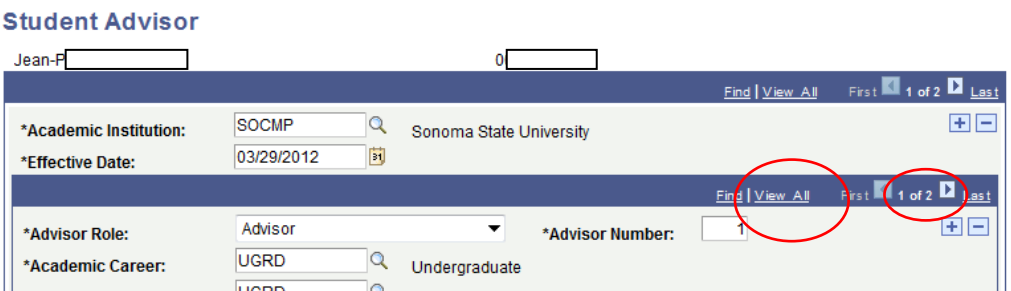
Case Sensitive


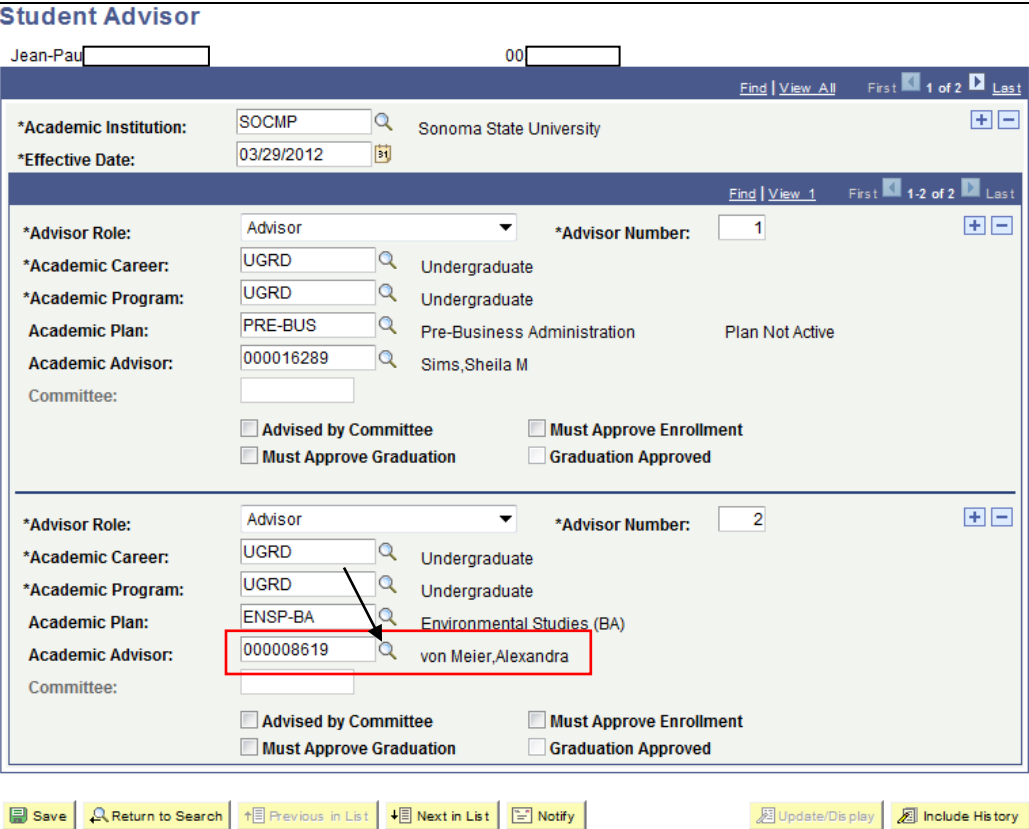

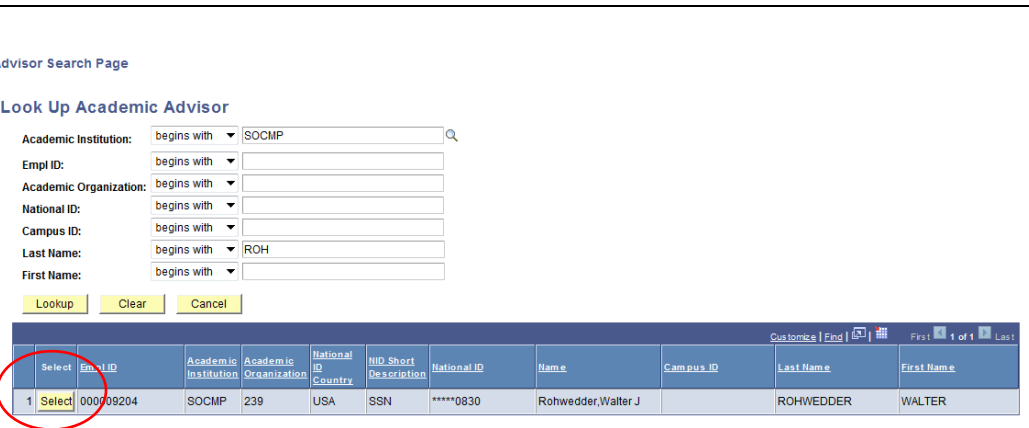
[Basic Search](#)

Search Results


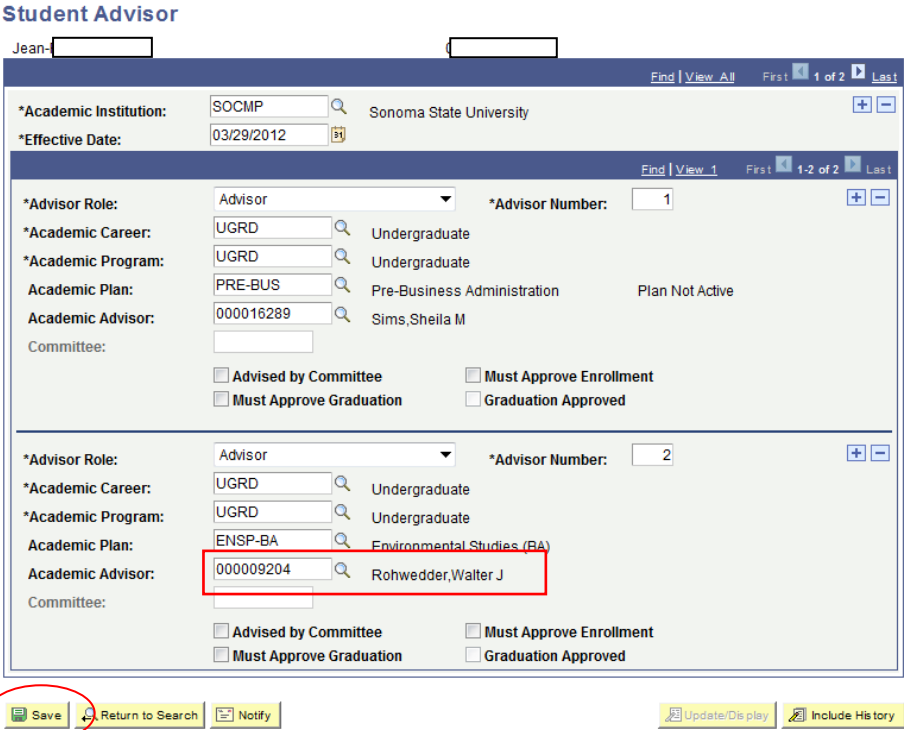
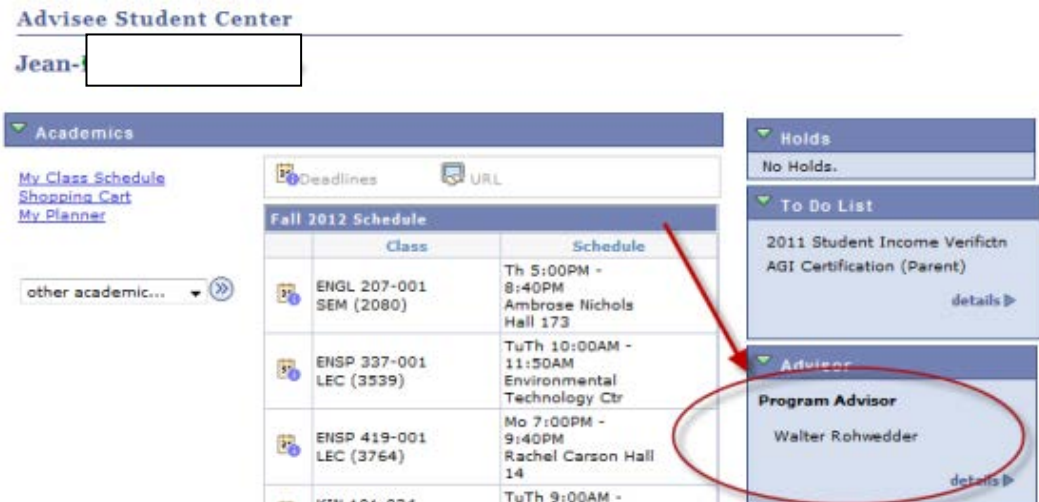
[View All](#)

ID	Name	Gender	Date of Birth	Campus ID	Local Campus ID	National ID	National ID Cou
003141897	Faraj	Male	09/28	(blank)	(blank)	*****1273	USA

Step	Action	Screenshot
2	Click on the top plus icon to add a new row	 <p>The screenshot shows the 'Student Advisor' form. At the top right of the form, there is a plus icon (+) circled in red, indicating where to click to add a new row. The form fields include: *Academic Institution: SOCMP (Sonoma State University), *Effective Date: 08/10/2011, *Advisor Role: Advisor, *Advisor Number: 1, *Academic Career: UGRD (Undergraduate), *Academic Program: UGRD (Undergraduate), Academic Plan: PRE-BUS (Pre-Business Administration, Plan Not Active), Academic Advisor: 000016289 (Sims, Sheila M), and several checkboxes for committee and approval options.</p>
3	Shows new effective date.	 <p>The screenshot shows the 'Student Advisor' form with the *Effective Date field updated to 03/29/2012, which is circled in red. The other fields remain the same as in the previous screenshot.</p>
4	Click on the View All if there is more than 1 showing.	 <p>The screenshot shows the 'Student Advisor' form. The 'View All' button in the top right corner of the form is circled in red. The *Effective Date field now shows 03/29/2012.</p>

<p>5</p> <p>To change the advisor but keep the Academic Plan the same, click on the spy glass next to the Academic Advisor, which at this point, is populated with an advisor name that you are going to replace. </p>	
<p>6</p> <p>Type in the last name of the advisor (first 3 letters should be fine). Click the select icon </p>	

Academic Advising

<p>7</p> <p>Click on the save button.</p> 	
<p>8</p> <p>Returning to the Advisee Student Center or Student Services Center, the advisor has now been updated.</p>	

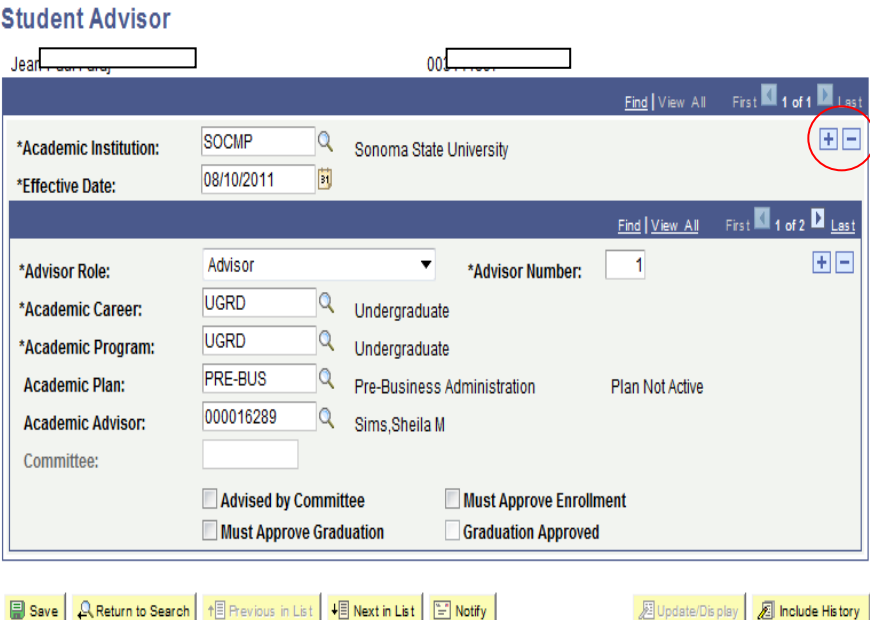
Academic Advising


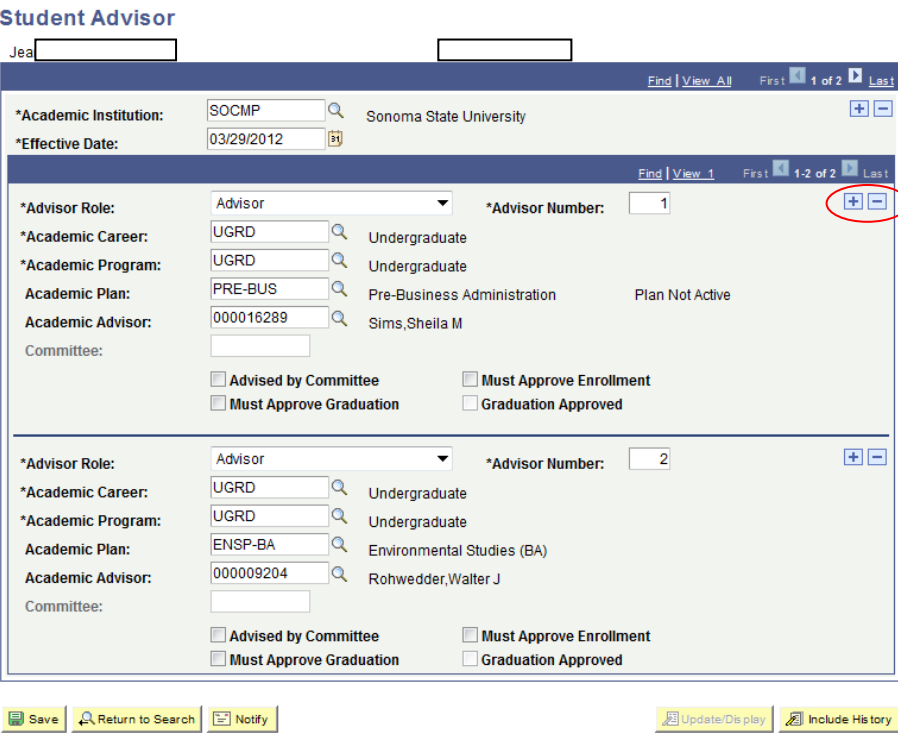
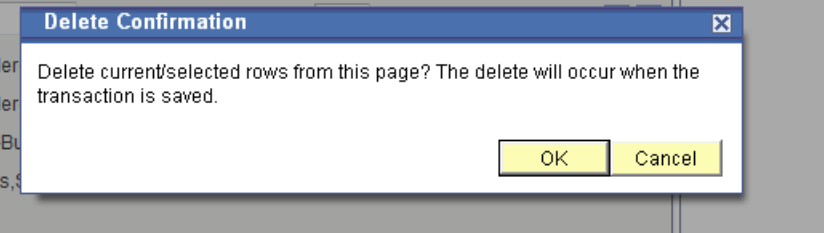
Lesson 3:


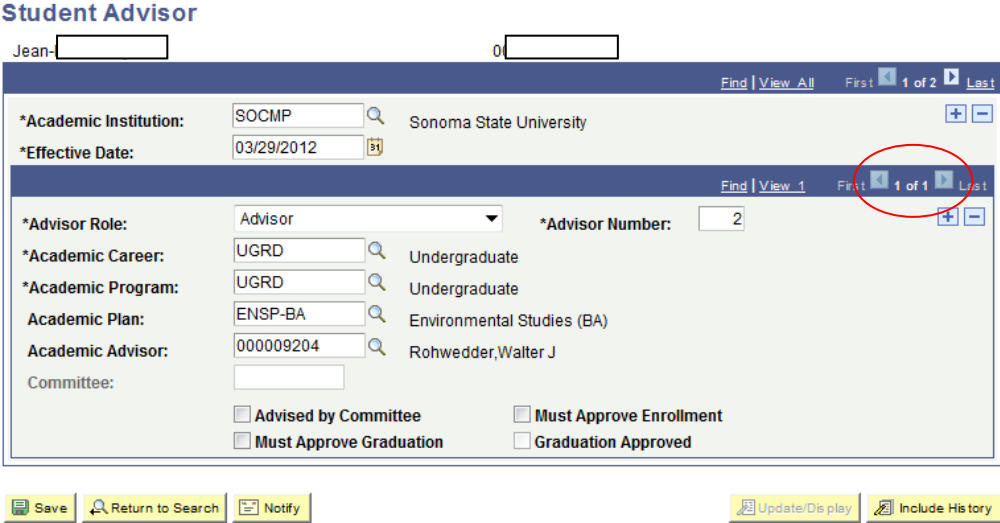
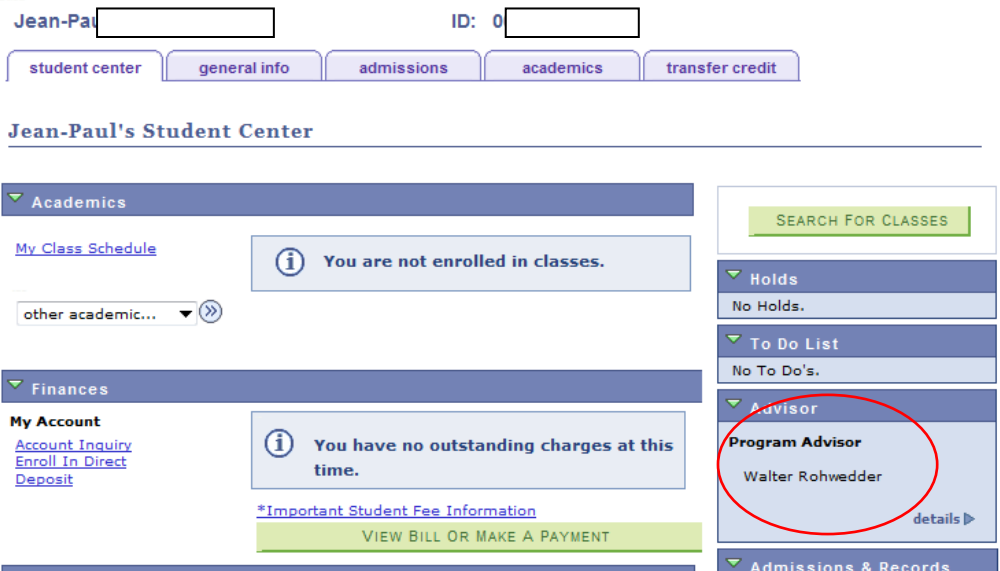
Navigation: Records and Enrollment > Student Background Information > Student Advisor

INTRODUCTION: The following will outline the steps necessary to delete an academic advisor from a student record. NOTE: This will only work if the student has more than one advisor.

For example, a student has both an ENSP-BA advisor assigned, and a MATH-BA advisor. The student is no longer a MATH-BA, so this lesson will show how to delete the MATH-BA advisor, but leave the ENSP-BA advisor.

<p>1</p> <p>From the Student Advisor page, search for your student and select.</p> <p>Once on the Student Advisor page, click the + button to the right of Academic Institution.</p>	
--	---

<p>Select View All.</p> <p>Delete an advisor by clicking on the minus icon. </p>	
<p>You will get a Delete Confirmation message, click OK.</p>	

<p>Click on the Save Icon. </p> <p>With the new effective date only one advisor is now assigned</p>	
<p>Students now see only their current advisor.</p>	

Lesson 4:

Navigation: Records and Enrollment > Student Background Information > Student Advisor

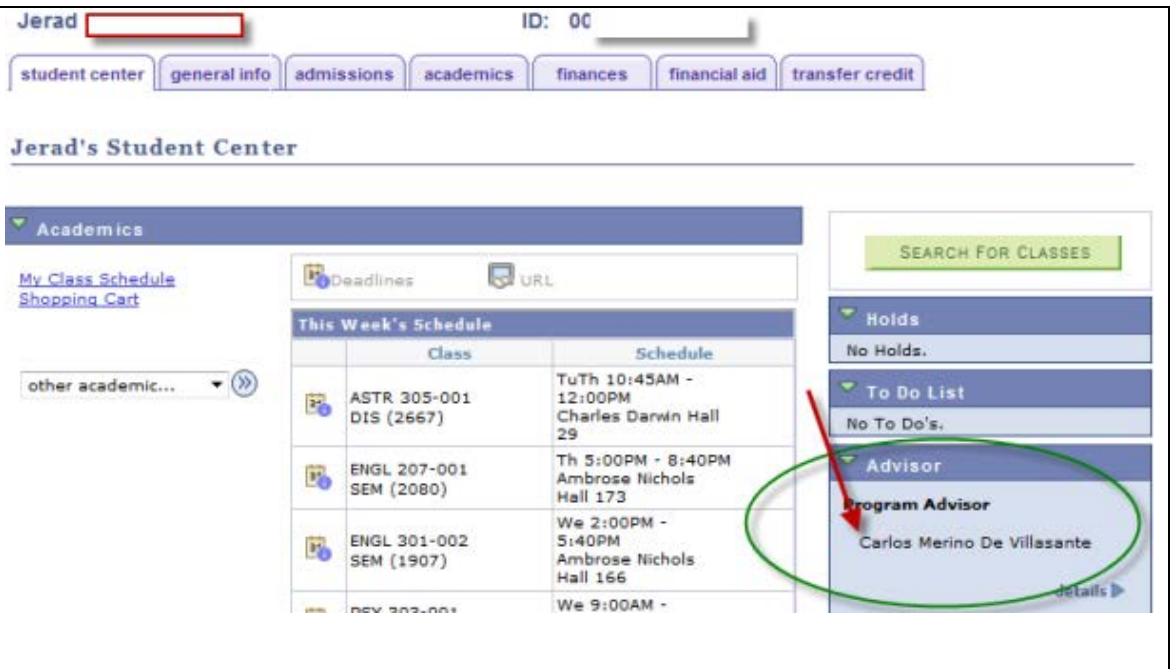
INTRODUCTION: The following will outline the steps necessary to delete an academic advisor from a student record.

Scenario: Has a student left your department? In this lesson, we'll review how to remove a student that was an Arts Major, but has since changed his major to Sociology. Since he changed his major, we no longer want him to show on the Art Major Advisors' "assigned advisees" list, nor do we want the Art advisor to show in the Student Center for this student as his assigned advisor.

1) Via Navigate to Campus Community > Student Services Center (student).

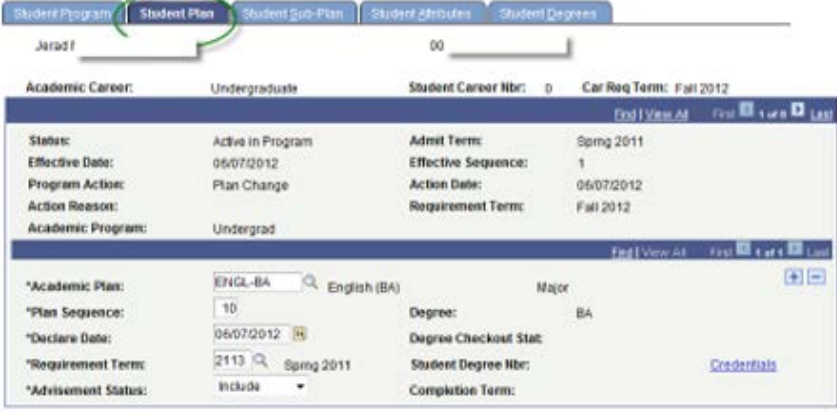
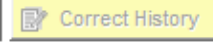
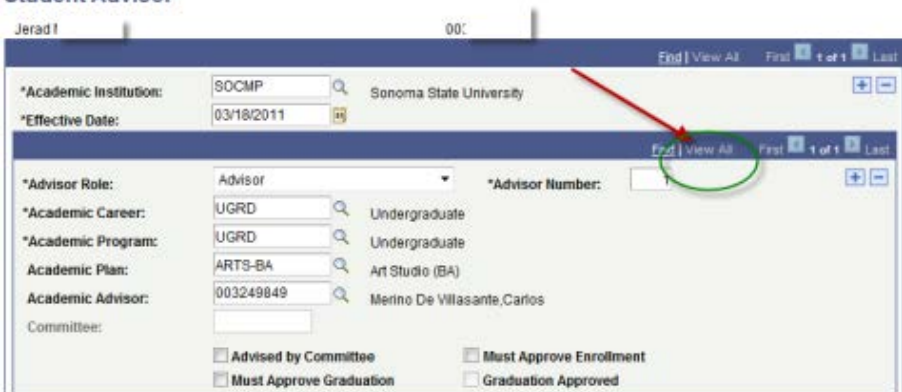
You can see who is currently listed as an advisor for your student.

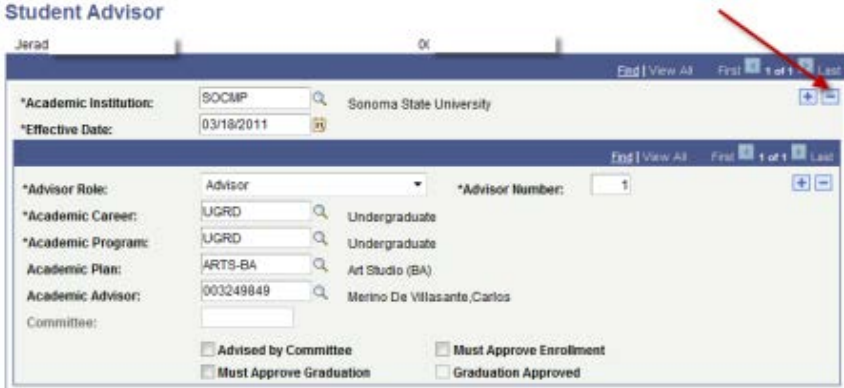
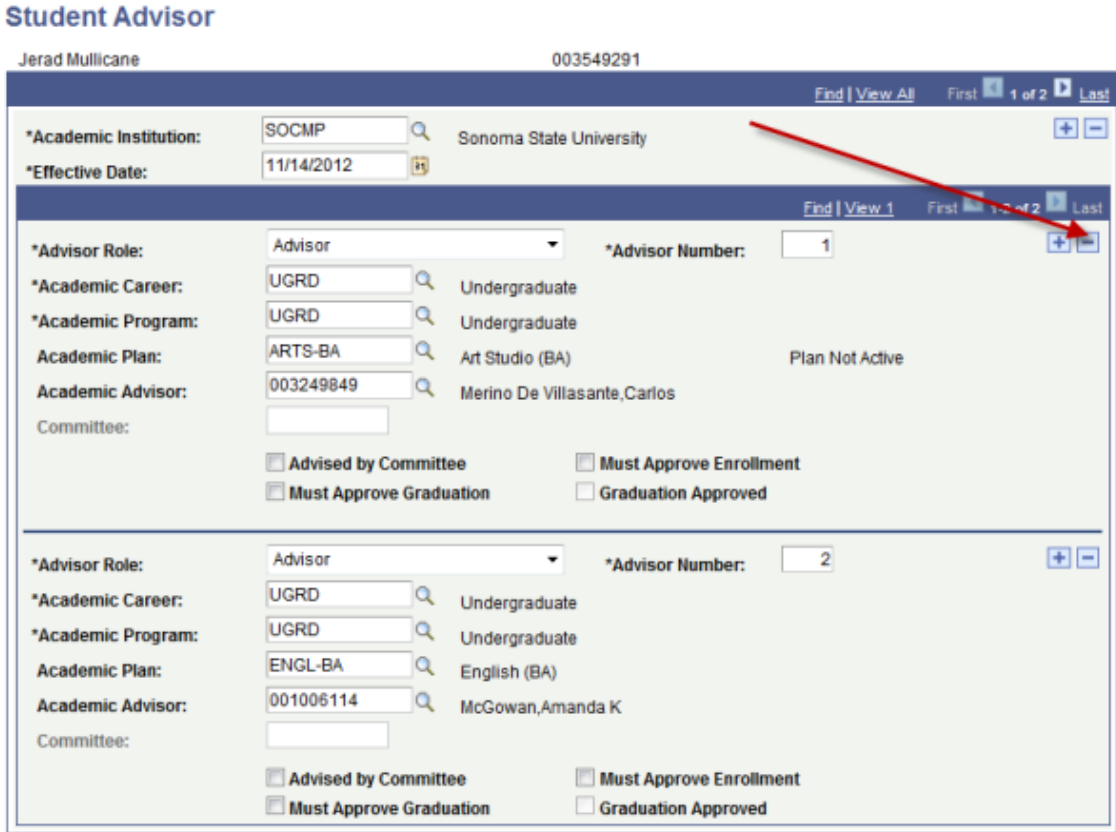
If you'd like to remove the advisor, follow this lesson.



The screenshot shows the 'Jerad's Student Center' page. At the top, there are navigation tabs: 'student center', 'general info', 'admissions', 'academics', 'finances', 'financial aid', and 'transfer credit'. Below the tabs, the 'Academics' section is expanded, showing 'My Class Schedule' and 'Shopping Cart'. A table titled 'This Week's Schedule' lists classes: ASTR 305-001 DIS (2667), ENGL 207-001 SEM (2080), and ENGL 301-002 SEM (1907). On the right side, there are sections for 'Holds', 'To Do List', and 'Advisor'. The 'Advisor' section is circled in green, and a red arrow points to the name 'Carlos Merino De Villasante'.

Class	Schedule
ASTR 305-001 DIS (2667)	TuTh 10:45AM - 12:00PM Charles Darwin Hall 29
ENGL 207-001 SEM (2080)	Th 5:00PM - 8:40PM Ambrose Nichols Hall 173
ENGL 301-002 SEM (1907)	We 2:00PM - 5:40PM Ambrose Nichols Hall 166
...	We 9:00AM - ...

<p>2) Verify that the student has left your department by reviewing their Plans on the Academic Program/Plan page.</p> <p>If the student is no longer in your major or minor, proceed to step 3.</p>	
<p>3) Navigate to the Student Advisor page and search for your student</p>	<p>Records and Enrollment > Student Background Information > Student Advisor</p>
<p>4) Correct History</p>	<p>Make sure you have turned on “Correct History” at the bottom of the page before continuing</p> 
<p>4) Verify the student has only this one advisor by looking for the “VIEW ALL” button on the second level.</p>	<p>Student Advisor</p> 

<p>5) If you have verified that there is only one advisor, you can use the minus sign at the top level to delete this advisor.</p>	
<p>6) In this scenario, the student has two advisors. One is for the Arts major, and the other advisor is for his new English major.</p> <p>We want to remove only his Arts major, since he is no longer in Arts, but retain his English major advisor.</p> <p>To do this, click on the minus sign next to the ARTS advisor only, not the minus sign at the top level.</p>	
<p>7) Make sure to hit save to complete this delete activity.</p>	

