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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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.

Click on the blue hyperlinked name to send an email to the advisors SSU email address.
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:
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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigate to the Student Advisor Page and search for the student.</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>2</td>
<td><strong>If</strong> The Student Advisor page is populated with data… <strong>Then</strong> Proceed to Step 3.</td>
<td><img src="image2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td></td>
<td><strong>If</strong> The Student Advisor page is not populated with data… <strong>Then</strong> Proceed to Step 5.</td>
<td><img src="image3.png" alt="Screenshot" /></td>
</tr>
</tbody>
</table>
### PeopleSoft Student Administration 9.0

3. Click on the plus sign to the right of Academic Institution.

4. Click on the plus sign to the right of Advisor Number.

5. Leave the Advisor Role as the default **Advisor**.

6. Enter the Student’s Academic Career.

<table>
<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>

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.

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**Academic Advising**

STAFF - http://www.sonoma.edu/it/cms/documentation.html

Last Updated: 10/27/14
7. Enter the Student’s Academic Program.

<table>
<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>

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.

8. Enter the Student’s Academic Plan (major).

You can click on the magnifying glass icon to view list of majors currently attached to the student.

The academic plan must be listed on their program/plan page or you won’t be able to add an advisor at this step.

Select the major for which the academic advisor is being added.
9. Click on the magnifying glass next to Academic Advisor.

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

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1)</td>
<td>Via the Student Services Center or Advisor Center, you can see who is currently listed as an advisor for your student. If you’d like to change the advisor, follow this lesson.</td>
<td><img src="image_url" alt="Screenshot" /></td>
</tr>
</tbody>
</table>
1. Navigate to the Student Advisor Page, input student’s last name and click on the student’s hyperlink.

### 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): 300

- **ID:** begins with ▼
- **Campus ID:** begins with ▼
- **Local Campus ID:** begins with ▼
- **National ID:** begins with ▼
- **Last Name:** begins with ▼ PARAJ
- **First Name:** begins with ▼

#### Case Sensitive

- [ ] Case Sensitive

#### Search Results

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Campus ID</th>
<th>Local Campus ID</th>
<th>National ID</th>
<th>National ID Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>0013141877</td>
<td>Paraj</td>
<td>Male</td>
<td>09/28</td>
<td>(blank)</td>
<td>(blank)</td>
<td>1273</td>
<td>USA</td>
</tr>
</tbody>
</table>

[Image: PeopleSoft Student Administration 9.0]

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**Academic Advising**

STAFF - [http://www.sonoma.edu/it/cms/documentation.html](http://www.sonoma.edu/it/cms/documentation.html)

Last Updated: 10/27/14
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Click on the top plus icon to add a new row</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>3</td>
<td>Shows new effective date.</td>
<td><img src="image2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>4</td>
<td>Click on the View All if there is more than 1 showing.</td>
<td><img src="image3.png" alt="Screenshot" /></td>
</tr>
</tbody>
</table>
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. Type in the last name of the advisor (first 3 letters should be fine). Click the select icon.
7. Click on the save button.

8. Returning to the Advisee Student Center or Student Services Center, the advisor has now been updated.
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.

1. From the Student Advisor page, search for your student and select.

   Once on the Student Advisor page, click the + button to the right of Academic Institution.
Select View All.

Delete an advisor by clicking on the minus icon.

You will get a Delete Confirmation message, click OK.
Click on the Save Icon.

With the new effective date only one advisor is now assigned

Students now see only their current advisor.
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.

<table>
<thead>
<tr>
<th>Jerad's Student Center</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academics</strong></td>
</tr>
<tr>
<td>My Class Schedule</td>
</tr>
<tr>
<td><strong>Advisor</strong></td>
</tr>
<tr>
<td>Carlos Merino De Vilasante</td>
</tr>
</tbody>
</table>

[Image of Student Center screen with Advisor highlighted]
2) Verify that the student has left your department by reviewing their Plans on the Academic Program/Plan page.

If the student is no longer in your major or minor, proceed to step 3.

3) Navigate to the Student Advisor page and search for your student

4) Make sure you have turned on “Correct History” at the bottom of the page before continuing

4) Verify the student has only this one advisor by looking for the “VIEW ALL” button on the second level.
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.

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.

   We want to remove only his Arts major, since he is no longer in Arts, but retain his English major advisor.

   To do this, click on the minus sign next to the ARTS advisor only, not the minus sign at the top level.

7) Make sure to hit save to complete this delete activity.