



# JOB AID

## Academic Advising: Advisor Assignment

*06/22/2021*





## Academic Advising: Advisor Assignment

When a student is admitted, matriculated, and becomes eligible to enroll for classes, they will not yet have an advisor assigned to them. This job aid provides instructions on assigning an advisor, changing an advisor, and assigning multiple advisors to a student.

**NOTE: Follow these numbered steps in the order provided.**

### Assign Advisor

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

1. Enter the student's **ID**, if known. If you do not know the ID number, search by Last Name/First Name or by Campus ID (aka NetID).

**Note:** Within Campus Solutions, the 'A' in student IDs (APID) has been replaced with a '1.' For example, legacy SIS ID A123456789 will be 1123456789 in Campus Solutions.

2. Click the **Include History** checkbox.
3. Click **Search**.

The **Student Advisor** page will display.

On the page, you will see two distinct areas – a Student Details area, with an Effective Date field and a Student Academic Details section, where you can assign one or more academic advisors to a student.



When assigning an advisor to a student for the first time, you need to select the Academic Career, Academic Program (aka college) and Academic Plan (aka major or minor) to which that advisor is connected.

- Academic Career:** Click the look-up icon and select from the list. Only the careers with which the student is affiliated will appear. In this example, the student is affiliated with more than one career. We are assigning an advisor to their undergraduate program, so will choose Undergrad.

- Academic Program:** Click the look-up icon and select from the list. In this example, the student is active in the College of Communication Arts & Sciences.

**Note:** While active and inactive programs may appear in the list, it is important to only select an active program when making an advisor assignment. If no active program is available, do not assign an advisor. Click Return to Search and work with the student's program of study to ensure they are active in at least one program.

- Academic Plan:** Click the look-up icon and select from the list. The list will include majors and the minors that the student has on their record. As with the Academic Program, only select an active plan when making an advisor assignment.



Search Results		
View 100	First	1-2 of 2 Last
Academic Plan	Description	Program Status
JOURNA_BA1	Journalism BA1	Active in Program
SPORT_MNUN	Sports Journalism MNUN	Active in Program

7. **Academic Advisor:** Click the look-up icon. The **Advisor Search** page will open.

**Note:** Before clicking the advisor look-up, you must first populate the Academic Career and Academic Program fields. Failure to do so will result in an error when looking up an Advisor.

Advisor Search Page

Look Up Academic Advisor

Academic Institution begins with MSU55

\*Empl ID begins with

Academic Organization begins with

National ID begins with

Campus ID begins with

Last Name begins with

First Name begins with

Lookup Clear Cancel

8. Search for advisor by entering:
  - a. **Last Name and First Name**
  - or
  - b. **Campus ID (aka NetID)** (if known)
  - c. Click **Lookup**.

A list of advisors meeting the search criteria will appear in the Search Results list.

Search Results									
Select	ID	Academic Institution	Academic Organization	National ID Country	NID Short Description	National ID	Name	Campus ID	Last Name
Select	1218	MSU55	10000000	USA	SSN	*****			

- d. Click the **Select** button for the appropriate advisor.

You will return to the Student Advisor page where you can review the details before saving the advisor assignment.



Student Advisor

Student Details

\*Academic Institution: MSU55 Michigan State University

\*Effective Date: 02/01/2021

Student Academic Details

\*Advisor Role: Advisor \*Advisor Number: 1

\*Academic Career: UGRD Undergraduate

\*Academic Program: UCAS College of Comm Arts & Sci

Academic Plan: JOURNA\_BA1 Journalism BA1

Academic Sub-Plan:

Academic Advisor:

Advisor Percentage:

Committee:

☐ Advised by Committee ☐ Must Approve Enrollment

☐ Must Approve Graduation ☐ Graduation Approved

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

9. Click **Save**.

### Change Advisor Assignment

**Navigation:** NavBar > 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

Search Criteria

ID: begins with

Campus ID: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

1. Enter the student's **ID**, if known. If you do not know the ID number, search by Last Name/First Name or by Campus ID (aka NetID).

**Note:** Within Campus Solutions, the 'A' in student IDs (APID) has been replaced with a '1.' For example, legacy SIS ID A123456789 will be 1123456789 in Campus Solutions.



2. Click the **Include History** checkbox.
3. Click **Search**.

The **Student Advisor** page will open containing details for any existing advisor assignments.

To make a change, we must add a new effective-dated row in the Student Details section. This will preserve any historical advisor assignments.

4. Click the top-most **[+] Add a Row** button. The Student Details portion of the page gets an additional row added with today's effective date displayed.
5. To change the current academic advisor assignment, click the look-up icon to the right of the Academic Advisor field. The **Advisor Search** page will open.

6. Search for the new advisor by entering:



a. **Last Name and First Name**

or

b. **Campus ID (aka NetID)** (if known)

c. Click **Lookup**.

A list of advisors meeting the search criteria will appear in the Search Results list.

Search Results										Personalize   Find   [icon]   First 1 of 1 Last	
	Select	ID	Academic Institution	Academic Organization	National ID Country	NID Short Description	National ID	Name	Campus ID	Last Name	First Name
1	Select	1810	MSU55	10000000	USA	SSN	*****				

d. Click the **Select** button for the new advisor.

You will return to the Student Advisor page where you can review the details before saving the new advisor assignment.

**Note:** In the image below, you can see that there are now two rows of advisor assignments for this student, with the most current row being displayed as **Row 1 of 2**.

The screenshot shows the 'Student Advisor' page. The 'Student Details' section includes fields for Academic Institution (MSU55), Effective Date (02/01/2021), and Michigan State University. The 'Student Academic Details' section includes fields for Advisor Role (Advisor), Academic Career (UGRD), Academic Program (UCAS), Academic Plan (JOURNA\_BA1), Academic Sub-Plan, Academic Advisor (1810), Advisor Percentage, and Committee. The 'First 1 of 2' indicator is highlighted in the top right of the Student Academic Details section.

### Assign Multiple Advisors to a Student

If a student is to have two different advisors (as may be the case with students pursuing multiple majors or minors), you must first add a new effective-dated row in the top section (Student Details), and then add a row for each advisor in the bottom section (Student Academic Details).

1. In the **Student Details** section, click the **[+] Add a Row** button. An additional row will be added with today's effective date displayed.





Student Advisor

Student Details

\*Academic Institution MSU55 Michigan State University

\*Effective Date 02/01/2021

Student Academic Details

\*Advisor Role Advisor

\*Academic Career UGRD Undergraduate

\*Academic Program UCAS College of Comm Arts & Sci

Academic Plan JOURNA\_BA1 Journalism BA1

Academic Sub-Plan

Academic Advisor 1810

Advisor Percentage

Committee

☐ Advised by Committee ☐ Must Approve Enrollment

☐ Must Approve Graduation ☐ Graduation Approved

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

2. In the Student Academic Details section, click the **[+] Add a Row** button. This is where you will enter the advisor details:
  - a. Enter the Academic Career, Program and Plan to which that additional advisor is connected.
  - b. Search for the **Academic Advisor** by clicking the look-up icon. The **Advisor Search** page will open.

Advisor Search Page

Look Up Academic Advisor

Academic Institution begins with MSU55

\*Empl ID begins with

Academic Organization begins with

National ID begins with

Campus ID begins with

Last Name begins with

First Name begins with

Lookup Clear Cancel

3. Search for the additional advisor by entering:
  - a. **Last Name and First Name**
  - or
  - b. **Campus ID (aka NetID)** (if known)
  - c. Click **Lookup**.





A list of advisors meeting the search criteria will appear in the Search Results list.

- d. Click the **Select** button for the additional advisor.

You will return to the Student Advisor page where you can review the details before saving the advisor assignment.

As shown in the image below, the student now has two rows in the Student Academic Details section – one for each advisor assignment.

The screenshot shows the 'Student Advisor' page in the Student Information System. The page has a dark green header with 'Admin Home' and 'Student Advisor' links, and navigation icons. Below the header, there's a 'Student Details' section with fields for 'Academic Institution' (MSU55) and 'Effective Date' (02/01/2021). The 'Student Academic Details' section is highlighted with a red box and contains a table with two rows of advisor assignments. The first row shows 'Advisor Role' as 'Advisor', 'Academic Career' as 'UGRD', 'Academic Program' as 'UCAS', 'Academic Plan' as 'JOURNA\_BA1', and 'Academic Sub-Plan' as 'Journalism BA1'. The second row shows 'Advisor Role' as 'Advisor', 'Academic Career' as 'UGRD', 'Academic Program' as 'UCAS', 'Academic Plan' as 'JOURNA\_BA1', and 'Academic Sub-Plan' as 'Journalism BA1'. The 'Advisor Number' is 2. The 'Advisor Percentage' is 1218. The 'Committee' is empty. There are checkboxes for 'Advised by Committee', 'Must Approve Enrollment', 'Must Approve Graduation', and 'Graduation Approved'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

Use the arrows to advance between the rows or click **View All** to see both **Advisor 1** and **Advisor 2** at a glance.



[Admin Home](#) **Student Advisor** [New Window](#) [Help](#) [Personalize Page](#)

**Student Advisor**

**Student Details** [Find](#) [View All](#) First 1 of 3 Last

\*Academic InstitutionMSU55Michigan State University

\*Effective Date02/01/2021

**Student Academic Details** [Find](#) [View 1](#) First 1-2 of 2 Last

\*Advisor RoleAdvisor

\*Academic CareerUGRDUndergraduate

\*Academic ProgramUCASCollege of Comm Arts & Sci

Academic PlanJOURNA\_BA1Journalism BA1

Academic Sub-Plan

Academic Advisor1810

Advisor Percentage

Committee

☐ Advised by Committee☐ Must Approve Enrollment☐ Must Approve Graduation☐ Graduation Approved

\*Advisor Number1

\*Advisor RoleAdvisor

\*Academic CareerUGRDUndergraduate

\*Academic ProgramUCASCollege of Comm Arts & Sci

Academic PlanJOURNA\_BA1Journalism BA1

Academic Sub-Plan

Academic Advisor1218

Advisor Percentage

Committee

☐ Advised by Committee☐ Must Approve Enrollment☐ Must Approve Graduation☐ Graduation Approved

\*Advisor Number2

[Save](#) [Return to Search](#) [Notify](#) [Update/Display](#) [Include History](#) [Correct History](#)