



# JOB AID

Advisor Assignment: Grad Career

*06/01/2024*





## Advisor Assignment: Grad Career

When a graduate 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 to staff on how to assign an advisor, change an advisor, and assign multiple advisors to a student in the Grad career. **Note: Students cannot assign an advisor themselves, but each Graduate Student must have an advisor on their student record in SIS.**

### Assigning an Advisor

**Navigation:** Navigator > Menu > Records and Enrollment > Student Background Information > Student Advisor

**Note:** Users need to have the MSU CS AA Advisor Assignment role to be able to perform this task. (Use the Default Form in TDX to request this role.)

#### Student Advisor

##### Find an Existing Value

###### Search Criteria

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

Recent Searches: Choose from recent searches | Saved Searches: Choose from saved searches

ID: begins with |  
Campus ID: begins with |  
National ID: begins with |  
Last Name: begins with |  
First Name: begins with |  
Show fewer options

☐ Case Sensitive ☒ Include History ☐ Correct History

Search Clear

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

The **Student Advisor** page will be displayed.

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 (Grad), Academic Program (examples: DEGR, MANR, etc.) and Academic Plan Code (examples: CMPTRS\_PHD, AFRECON\_MS, etc.) to which that advisor is connected.

4. **Academic Career:** Click the look-up icon and select from the list. Only the careers the student is affiliated with will appear. In this example, the student is affiliated with more than one career.

#### Search Results

View 100	First	1-2 of 2	Last
Academic Career			
Graduate			
Undergrad			

We are assigning an advisor to their graduate program, so choose Graduate.

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

**Notes:** 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 department to ensure they are active in at least one program. Also, if a student is in a Master's Program and a Doctoral Program an advisor needs to be assigned for each program.

#### Search Results

View 100	First	1 of 1	Last
Academic Program	Description	Program Status	
DEGR	Doctorate in Engineering	Active in Program	

6. **Academic Plan:** Click the look-up icon and select from the list. The list will include majors 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 of 1	Last
Academic Plan	Description	Program Status	
CMPTRS_PHD	Computer Science PHD	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. (If you are unable to find a faculty member, they may not be in the Instructor/Advisor Table. Fill out the SIS Service Request form at

<https://tdx.msu.edu/TDClient/32/Portal/Requests/TicketRequests/NewForm?ID=aGnBvzpBQt4&RequestorType=ServiceOffering> to request to have faculty added to the Instructor/Advisor table, if needed.)

The screenshot shows the 'Advisor Search Page' with a 'Look Up Academic Advisor' section. It contains several dropdown menus for 'begins with' and text input fields. The 'Academic Institution' field is populated with 'MSU55'. The 'Lookup' button is highlighted with a red box. Red arrows point to the 'Campus ID', 'Last Name', and 'First Name' fields.

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										Personalize	Find	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	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** Find | View All First 1 of 1 Last

\*Academic Institution MSU55 Michigan State University

\*Effective Date 03/01/2024

**Student Academic Details** Find | View All First 1 of 1 Last

\*Advisor Role Advisor \*Advisor Number 1

\*Academic Career GRAD Graduate

\*Academic Program DEGR Doctorate in Engineering

Academic Plan CMPTRS\_PHD Computer Science PHD

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:** Navigator > Menu > Records and Enrollment > Student Background Information > Student Advisor

## Student Advisor

### Find an Existing Value

#### Search Criteria

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

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

ID: begins with

Campus ID: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

Show fewer options

☐ Case Sensitive ☐ Include History ☐ Correct History

Search Clear

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

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



Student Advisor

Student Details

\*Academic Institution MSU55 Michigan State University

\*Effective Date 03/01/2024

Student Academic Details

\*Advisor Role Advisor

\*Academic Career GRAD Graduate

\*Academic Program DEGR Doctorate in Engineering

Academic Plan CMPTRS\_PHD Computer Science PHD

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

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

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

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	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	1218	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 screenshot 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 for a student at Michigan State University. The 'Student Details' section at the top shows the student's name, academic institution (MSU55), and effective date (03/01/2024). Below this, the 'Student Academic Details' section shows the advisor role (Advisor), academic career (GRAD), academic program (DEGR), and academic plan (CMPTRS\_PHD). The 'Academic Advisor' field is empty. The 'Advisor Number' is 1. The 'Advisor Percentage' and 'Committee' fields are also empty. The 'Must Approve Enrollment' and 'Must Approve Graduation' checkboxes are unchecked. The 'Advised by Committee' checkbox is checked. The 'Graduation Approved' checkbox is checked. The 'Update/Display', 'Include History', and 'Correct History' buttons are at the bottom right.

## Assign Multiple Advisors to a Student

If a student is to have two different advisors 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.

The screenshot shows the 'Student Advisor' page for a student at Michigan State University. The 'Student Details' section at the top shows the student's name, academic institution (MSU55), and effective date (03/01/2024). Below this, the 'Student Academic Details' section shows the advisor role (Advisor), academic career (GRAD), academic program (DEGR), and academic plan (CMPTRS\_PHD). The 'Academic Advisor' field is empty. The 'Advisor Number' is 1. The 'Advisor Percentage' and 'Committee' fields are also empty. The 'Must Approve Enrollment' and 'Must Approve Graduation' checkboxes are unchecked. The 'Advised by Committee' checkbox is checked. The 'Graduation Approved' checkbox is checked. The 'Update/Display', 'Include History', and 'Correct History' buttons are at the bottom right.

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.



The screenshot shows the 'Advisor Search Page' with a 'Look Up Academic Advisor' section. It contains several dropdown menus for 'begins with' criteria: Academic Institution, \*Empl ID, Academic Organization, National ID, Campus ID, Last Name, and First Name. The 'Academic Institution' dropdown is set to 'MSU55'. Below the dropdowns are three buttons: 'Lookup' (highlighted with a red box), 'Clear', and 'Cancel'. Red double-headed arrows are positioned between the 'Campus ID', 'Last Name', and 'First Name' dropdowns and their corresponding input fields.

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. The 'Student Details' section at the top shows 'Academic Institution' as 'MSU55' and 'Effective Date' as '03/01/2024'. The 'Student Academic Details' section below contains fields for 'Advisor Role' (set to 'Advisor'), 'Advisor Number' (set to '2'), 'Academic Career' (set to 'GRAD'), 'Academic Program' (set to 'DEGR'), and 'Academic Plan' (set to 'CMPTRS\_PHD'). At the bottom of this section are checkboxes for 'Advised by Committee', 'Must Approve Enrollment', 'Must Approve Graduation', and 'Graduation Approved'. At the top right of the 'Student Academic Details' section, there is a navigation bar with 'Find | View All' and a list of page numbers: 'First', '1 of 2', and 'Last'. The '2 of 2' link is highlighted with a red box.

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





Student Advisor

Student Details

\*Academic Institution MSU55 Michigan State University

\*Effective Date 03/01/2024

Student Academic Details

\*Advisor Role Advisor \*Advisor Number 1

\*Academic Career GRAD Graduate

\*Academic Program DEGR Doctorate in Engineering

Academic Plan CMPTRS\_PHD Computer Science PHD

Academic Sub-Plan

Academic Advisor

Advisor Percentage

Committee

☐ Advised by Committee ☐ Must Approve Enrollment

☐ Must Approve Graduation ☐ Graduation Approved

\*Advisor Role Advisor \*Advisor Number 2

\*Academic Career GRAD Graduate

\*Academic Program DEGR Doctorate in Engineering

Academic Plan CMPTRS\_PHD Computer Science PHD

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