JOB AID

Academic Advising: Advisor Assignment

06/22/2021
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.

4. **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.

5. **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.

6. **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.
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.

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.

   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.
9. Click **Save**.

**Change Advisor Assignment**

**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 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:
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.
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.

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.

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

<table>
<thead>
<tr>
<th>Academic Career</th>
<th>Academic Program</th>
<th>Academic Sub-Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>UGRO</td>
<td>UCAS</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Academic Advisor</th>
<th>Advisor Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1810</td>
<td></td>
</tr>
</tbody>
</table>

**Advisor Number:** 1

**Advisor Number:** 2

<table>
<thead>
<tr>
<th>Advised by Committee</th>
<th>Must Approve Enrollment</th>
<th>Graduation Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Advised by Committee</th>
<th>Must Approve Enrollment</th>
<th>Graduation Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>