Maintaining a Student’s Advisor

Business Process Guide

Updates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Page(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/21/12</td>
<td>Created</td>
<td></td>
</tr>
<tr>
<td>09/20/13</td>
<td>Added “Online Advisor” role</td>
<td>1-3</td>
</tr>
<tr>
<td>02/07/14</td>
<td>Updated navigation paths for MyCWU.</td>
<td>all</td>
</tr>
<tr>
<td>08/30/17</td>
<td>Added disclaimer note</td>
<td>4</td>
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Maintaining a Student’s Advisor Overview

There are several Advisor Roles from which to choose. Below is a table to help differentiate when an Advisor Role should be used.

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<tr>
<th>Advisor Role</th>
<th>Maintained by:</th>
<th>Definition (if needed):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Advisor</td>
<td>C&amp;S or TEP Departments</td>
<td></td>
</tr>
<tr>
<td>Exam Committee Chair</td>
<td>Graduate Office</td>
<td></td>
</tr>
<tr>
<td>Exam Committee Member</td>
<td>Graduate Office</td>
<td></td>
</tr>
<tr>
<td>General Advisor</td>
<td>N/A</td>
<td>As of 10/2010, this role is being replaced with UNDE and SUPP. We are not overriding those already assigned to this role.</td>
</tr>
<tr>
<td>Major Advisor</td>
<td>Academic Departments</td>
<td></td>
</tr>
<tr>
<td>Minor Advisor</td>
<td>Academic Departments</td>
<td></td>
</tr>
<tr>
<td>Online Advisor</td>
<td>Online Advising &amp; Retention</td>
<td>Advisor advises the student until the student is no longer active in an online major program.</td>
</tr>
<tr>
<td>Thesis Committee Chair</td>
<td>Graduate Office</td>
<td></td>
</tr>
<tr>
<td>Thesis Committee Member</td>
<td>Graduate Office</td>
<td></td>
</tr>
<tr>
<td>International Advisor</td>
<td>International Programs</td>
<td></td>
</tr>
<tr>
<td>Support and Resource Advisor</td>
<td>STAR/CAMP/SSS/TRIO</td>
<td>Advisor advises the student until the student is no longer active in special program.</td>
</tr>
<tr>
<td>Undeclared Advisor</td>
<td>Academic Advising/UNIV 101</td>
<td>The undeclared advisor only remains with the student until the student declares a major.</td>
</tr>
<tr>
<td>Center Advisor</td>
<td>Academic Advising – Center Advisors</td>
<td>Center advisors will always remain with the student, along with the student's major advisor.</td>
</tr>
<tr>
<td>Advisor Needed</td>
<td>Safari Modification</td>
<td>This role is placed on a student's record when the student does not have a correct advising plan declared.</td>
</tr>
</tbody>
</table>

**PLEASE NOTE:** If you add, delete or update information regarding an Advisor through Records and Enrollment > Student Background Information > Student Advisor, and you have to enter a FUTURE Effective Date, be aware that that information will not show up on the Maintain Acad Plans page until that FUTURE date arrives.
Before You Begin

Prerequisites and Assumptions

Before you can successfully Maintain a Student’s Advisor, it is assumed that each of the following conditions has been met:

- It is known whether or not this is an addition or a replacement of Advisors

Other Materials Needed

To Maintain a Student’s Advisor correctly, you may need to refer to the following documents:

- Forms indicating Advisor(s) for students
Attention: Please be aware many of the MyCWU CS user guides/BPGs were developed for a previous version of MyCWU. We are working on updating these, but in the meantime there may be instances where you encounter slight discrepancies between what the guide advises and what you see on your screen. In most cases these changes are purely cosmetic, but there may be some impacts on functionality as well. If you have questions regarding these guides, please contact reg@cwu.edu.

1.0 Maintaining a Student’s Advisor

1.1 Accessing a Student’s Advisor

Navigation: Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor

Follow the navigation path listed above to access the search page for Student Advisor.

Steps for Locating the Student:

1. On the search page for Student Advisor, enter the student’s CWU ID number into the ID field. Or, if the ID of the individual is not known, you may search using the student’s Last Name (or a portion of it). This search will display all students whose last name meets the criteria you entered into the search field.

   Another option is to carry out a search using both the Last Name and First Name fields (may enter just a portion of each). If you wish to use the First Name field to search, you must also enter at least a portion of the last name into the Last Name field.

2. Click the Search button.

3. To clear the information you entered into the fields on this page, click the Clear button.
Steps for Working with the Student Advisor Page:

1. If you wish to add an Advisor, proceed to section 1.2 below.
2. If you wish to delete an Advisor entirely, proceed to section 1.3 below.
3. If you wish to make other changes to a student’s Advisor information, proceed to section 1.4 below.

1.2 Adding a Student’s Advisor

Navigation: Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor

If you have not already accessed the Student Advisor page, follow the directions in section 1.1 above to do so.
1. If the student has not yet had any Advisors assigned (no advisors are listed on the Student Advisor page), proceed to section 1.2.1 below.

2. If there is already one or more Advisors listed on the Student Advisor page (as in the screenshot above), proceed to section 1.2.2 below.

### 1.2.1 Entering an Advisor for a Student

**Navigation:**  
Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor

If you have not already accessed the Student Advisor page, follow the directions in section 1.1 above to do so.
Steps for Entering an Advisor for a Student:

1. On the Student Advisor page, CWUID will default into the Academic Institution field, and the current date will default into the Effective Date field.

2. Click the dropdown arrow for the Advisor Role field and choose the appropriate Advisor Role (see ADVISOR ROLE TABLE in Overview at the beginning of this document).

3. Set the Advisor Number appropriately. If this is the first Advisor entered for this Plan, it should be set to 1. A student may have more than one Advisor per Plan.

4. Enter the appropriate Academic Career. You can click the magnifying glass to look up the Academic Career for the student. When the Look Up Academic Career page appears, click the button. When the Search Results appear, click on the link for the Academic Career of your choice.

5. Enter the appropriate Academic Program. You can click the magnifying glass to look up the Academic Program for the student. When the Look Up Academic Program page appears, click the button. When the Search Results appear, click on the link for the Academic Program of your choice.

6. Enter the Academic Plan. You can click the magnifying glass to look up the Academic Plan for the student. When the Look Up Academic Plan page appears, click the button. When the Search Results appear, click on the link for the Academic Plan of your choice.

7. Enter the appropriate Academic Advisor. You can click the magnifying glass to look up an Academic Advisor. When the Look Up Academic Advisor page appears, narrow your search by entering the Advisor’s name into the Last Name field and possibly First Name field. When the Search Results appear, click on the link for the Academic Advisor of your choice.

If the Advisor you need to add is not available for entry, you should contact the Administrative Assistant to the Dean of the respective college because the Advisor needs to be added to the Instructor/Advisor table.
The check boxes at the bottom of the Advisor box provide no functionality and should not be used.

8. When finished entering the student’s Advisor information, click the Save button.

Once you have saved the page, any attempts to make additional changes ON THE SAME DAY to this student’s Advisor information must be future dated with the following day’s date in the Effective Date field. The other option would be to wait until the following day to make changes.

Please note: If you add, delete or update information regarding an Advisor through Records and Enrollment > Student Background Information > Student Advisor, and you have to enter a FUTURE Effective Date, be aware that that information will not show up on the Maintain Acad Plans page until that FUTURE date arrives.

9. To enter Advisor information for a different student, click the Return to Search button to return to the search page for Student Advisor. Return to the directions in section 1.1 above.
1.2.2 Adding an Additional Advisor for a Student

Navigation: **Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor**

If you have not already accessed the **Student Advisor** page, follow the directions in section **1.1** above to do so.

![Student Advisor Page](image)

**Steps for Adding an Additional Advisor for a Student:**

1. If the student already has at least two Advisors (second title bar displays **1 of 2, 1 of 3**, etc.), then click on the **View All** link in the second title bar of the **Student Advisor** page. This will allow you to see each Advisor and the associated Plan vertically down the page, which will make it easier to add an Advisor. If the student only has one advisor (second title bar displays **1 of 1**), the **View All** link will not be active in the second title bar.
2. *CWUID* will default into the *Academic Institution* field.

3. Click the plus sign + below the top title bar to add an *Effective Dated* row.
4. The current date will default into the **Effective Date** field. If you have already saved changes to this student’s **Student Advisor** page today, you must change the **Effective Date** to tomorrow’s date to make additional changes. If not, leave the **Effective Date** as the current date.

5. Now click the plus sign under the second title bar to add an additional Advisor.
6. Click the dropdown arrow for the Advisor Role field and choose the appropriate Advisor Role (see ADVISOR ROLE TABLE in Overview at the beginning of this document).

7. Set the Advisor Number appropriately. If this is the first Advisor entered for this Plan, it should be set to 1. A student may have more than one Advisor per Plan.

8. Enter the appropriate Academic Career. You can use the magnifying glass to look up the Academic Career for the student. When the Look Up Academic Career page appears, click the button. When the Search Results appear, click on the link for the Academic Career of your choice.

9. Enter the appropriate Academic Program. You can use the magnifying glass to look up the Academic Program for the student. When the Look Up Academic Program page appears, click the button. When the Search Results appear, click on the link for the Academic Program of your choice.
10. Enter the **Academic Plan**. You can use the magnifying glass to look up the **Academic Plan** for the student. When the **Look Up Academic Plan** page appears, click the **Look Up** button. When the **Search Results** appear, click on the link for the **Academic Plan** of your choice.

11. Enter the appropriate CWU ID number of the **Academic Advisor**. If you are unsure of the Advisor’s ID number, you can use the magnifying glass to look up an **Academic Advisor**. When the **Look Up Academic Advisor** page appears, narrow your search by entering the Advisor’s name into the **Last Name** and, perhaps, **First Name** fields. When the **Search Results** appear, click on the link for the **Academic Advisor** of your choice.

If the Advisor you need to add is not available for entry, you should contact the Administrative Assistant to the Dean of the respective college because the Advisor needs to be added to the Instructor/Advisor table.

The check boxes at the bottom of the Advisor box provide no functionality and should not be used.

12. When finished adding the student’s Advisor information, click the **Save** button.

Once you have saved the page, any attempts to make additional changes ON THE SAME DAY to this student’s Advisor information must be future dated with the following day’s date in the **Effective Date** field. The other option would be to wait until the following day to make changes.

**PLEASE NOTE:** If you add, delete or update information regarding an Advisor through **Records and Enrollment > Student Background Information > Student Advisor**, and you have to enter a FUTURE **Effective Date**, be aware that that information will not show up on the **Maintain Acad Plans** page until that FUTURE date arrives.

13. To enter Advisor information for a different student, click the **Return to Search** button to return to the search page for **Student Advisor**. Return to the directions in section **1.1** above.

### 1.3 Deleting a Student’s Advisor

**Navigation:** [Main Menu](#) > [Campus Solutions](#) > [Records and Enrollment](#) > [Student Background Information](#) > [Student Advisor](#)

If you have not already accessed the **Student Advisor** page, follow the directions in section **1.1** above to do so.
Steps for Deleting a Student’s Advisor:

1. If the student has more than one Advisor (second title bar displays “1 of 2,” “1 of 3,” etc.), then click on the View All link in the second title bar on the Student Advisor page. This will allow you to see each Advisor and the associated Plan vertically down the page, which will make it easier to delete the appropriate Advisor.

   If the student only has one advisor (second title bar displays 1 of 1), the View All link will not be active in the second title bar.
2. *CWUID* will default into the **Academic Institution** field.
3. Click the plus sign under the top title bar to add an **Effective Dated** row.
4. The current date will default into the **Effective Date** field. If you have already saved changes to this **Student Advisor** page today, you must change the **Effective Date** to tomorrow’s date to make additional changes. If not, leave the **Effective Date** as the current date.

5. Click the minus sign under the second title bar to delete the appropriate advisor.
6. You will receive a message about the delete actually occurring when the transaction is saved.

7. Click the OK button of the message.

8. Then click the Save button at the bottom of the Student Advisor page.

**CAUTION:** Once you have saved the page, any attempts to make additional changes ON THE SAME DAY to this student’s Advisor information must be future dated with the following day’s date in the Effective Date field. The other option would be to wait until the following day to make changes.

**PLEASE NOTE:** If you add, delete or update information regarding an Advisor through Records and Enrollment > Student Background Information > Student Advisor, and you have to enter a FUTURE Effective Date, be aware that that information will not show up on the Maintain Acad Plans page until that FUTURE date arrives.

9. To enter Advisor information for a different student, click the Return to Search button to return to the search page for Student Advisor. Return to the directions in section 1.1 above.

### 1.4 Updating an Existing Advisor

**Navigation:** Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor

If you have not already accessed the Student Advisor page, follow the directions in section 1.1 above to do so.
Steps for Updating a Student’s Advisor:

1. If the student has more than one Advisor (second title bar displays 1 of 2, 1 of 3, etc.), then click on the View All link in the second title bar on the Student Advisor page. This will allow you to see each Advisor and the associated Plan vertically down the page, which will make it easier to edit the appropriate Advisor.

   If the student only has one advisor (second title bar displays 1 of 1), the View All link will not be active in the second title bar.

   [Image of the Student Advisor page]

2. **CWUID** will default into the Academic Institution field.

3. Click the plus sign under the top title bar to add an Effective Dated row.
4. The current date will default into the Effective Date field. If you have already saved changes to this **Student Advisor** page today, you must change the Effective Date to tomorrow's date to make additional changes. If not, leave the Effective Date as the current date.

5. Make any changes required to any of the fields under the second title bar, including replacing an Advisor with another for an existing Plan.

6. When finished updating the student's Advisor information, click the **Save** button.

**WARNING:** Once you have saved the page, any attempts to make additional changes ON THE SAME DAY to this student's Advisor information must be future dated with the following day’s date in the Effective Date field. The other option would be to wait until the following day to make changes.

**PLEASE NOTE:** If you add, delete or update information regarding an Advisor through Records and Enrollment > Student Background Information > Student Advisor, and you have to enter a FUTURE Effective Date, be aware that that information will not show up on the Maintain Acad Plans page until that FUTURE date arrives.

7. To enter Advisor information for a different student, click the **Return to Search** button to return to the search page for **Student Advisor**. Return to the directions in section 1.1 above.