Maintaining a Student’s Plan, Sub-Plan and Advisor

Business Process Guide

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Maintaining a Student’s Plan, Sub-Plan and Advisor Overview

A student’s Plan refers to the Major, Minor, Douglas Honors, Teaching Ed Option or Teaching Certificate. All other certificates are considered Milestones. Please refer to the Maintaining a Student Milestone Business Process Guide if adding or updating certificates other than Teaching or the Master’s Psychology Certificates. The Sub-plan is the student’s Specialization. A student must always have a Plan declared. The default is Undeclared.

Plans and Sub-plans that are no longer valid are noted with an asterisk at the beginning and the end of the title (i.e. *Aerospace Science* Major Plan).

The Sub-plan is attached directly to the Plan with which it belongs; thus, a student cannot have a Sub-plan (Specialization) without the Plan (Major). The Sub-plan will not appear on a student's transcript until the degree has been earned; it will, however, display on the CAPS report.

Most of the student data needed will be displayed on the Maintain Acad Plans page. You will see:

- Student Name
- ID number
- Admit Term
- Gen Ed Requirement Term
- Campus
- Expected Graduation Term (if applied for graduation)
- Degree Checkout Status
- Status with the University
- All Majors, Minors, Specializations and Advisors (assigned to each plan).

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

<table>
<thead>
<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Advisor advises the student until the student is no longer active in an online major program.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>
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<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>
Before You Begin

Prerequisites and Assumptions

Before you can successfully Maintain a Student’s Plan and Sub-plan, it is assumed that each of the following conditions has been met:

- The Major, Minor, Option, Certificate or Sub-plan paperwork has been submitted and approved
- The Student is active in the appropriate program

Other Materials Needed

To Maintain a Student’s Plan and Sub-plan correctly, you may need to refer to the following documents:

- The Major, Minor, Option, Certificate or Sub-plan paperwork
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 Plan, Sub-Plan and Advisor

Navigation: Main Menu > Campus Solutions > CWU Student Administration > Student Records > Student Career Information > Maintain Academic Plans

Follow the navigation path listed above to access the search page for Maintain Academic Plans.

Steps for Locating the Student:

1. On the search page for Maintain Academic Plans, 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.

   ![Search form with ID 22745541 filled in]

   Always leave the Academic Career and Student Career Nbr fields blank.

2. Click the button.
3. To clear the information you entered into the fields on this page, click the button.
4. If the Search Results display, showing that the student has been in more than one Career or Program, click on the Career and Program row that pertains to what you are doing. If there are multiple rows in the same Career, the best bet is to choose the highest Student Career Nbr.

Options Available Under Maintain Acad Plans:

1. The Maintain Acad Plans page will appear.
2. To add a plan, proceed to section 1.1 below.
3. To update a plan, proceed to section 1.2 below.
4. To delete a plan, proceed to section 1.3 below.
5. To add a specialization, proceed to section 1.4 below.
6. To update, delete or add a subsequent specialization, proceed to section 1.5 below.
7. To assign an advisor, proceed to section 1.6 below.

It is not possible to DELETE an advisor from the Maintain Acad Plans page. To DELETE an advisor, refer to the document entitled “Maintaining a Student’s Advisor.”

8. To enter Plan or Advisor information for a different student, click the Return to Search button to return to the search page for Maintain Academic Plans. Return to the Steps for Locating the Student section above.

1.1 Adding a Plan

Navigation: Main Menu > Campus Solutions > CWU Student Administration > Student Records > Student Career Information > Maintain Academic Plans

If you have not already accessed the Maintain Acad Plans page, follow the directions in section 1.0 above to do so.
Steps for Adding a Plan:

1. When the Maintain Acad Plans page appears, review the existing Academic Plans.
   - If the Plan you wish to add is already present but changes are required (i.e. you need to edit the plan), or if Undeclared is the only Academic Plan listed, as in the screenshot above, refer to the directions in section 1.2 below for editing a plan.
   - If neither of the above two situations is the case, then refer to section 1.1.1 below to add a new plan.

2. To enter Plan or Advisor information for a different student, click the button to return to the search page for Maintain Academic Plans. Return to the Steps for Locating the Student in section 1.0 above.

1.1.1 Adding a New Academic Plan

If you have not already accessed the Maintain Acad Plans page, follow the directions in section 1.0 above to do so.
Steps for Adding a New Academic Plan:

1. To add a new academic plan for a student, click the **Add New Academic Plan** button.

2. On the **Add New Plan** page that appears, if you do not know the code for the **Academic Plan** you wish to enter, proceed to the section below entitled **Tips for Adding a New Plan When the Plan Code is Unknown**.

3. If you know the code for the **Academic Plan** you wish to enter, proceed to the section below entitled **Tips for Adding a New Plan When the Plan Code is Known**.
Tips for Adding a New Plan When the Plan Code is Unknown:

1. Click the magnifying glass to the right of the Academic Plan field to look up the appropriate Plan.

2. To exit this page without looking up the Academic Plan, click the button. Return to the beginning of the directions above entitled Tips for Adding a New Plan When the Plan Code is Unknown.

3. To look up the code for an Academic Plan, first try narrowing the search before clicking the button. You can do this by entering some information into one or more of the fields on the Look Up Academic Plan page. Ideas you might try include the following:
   - Enter the first few letters of the Description of the Plan (In the screen shot above, “math” was entered.)
   - Enter a string of letters that should appear somewhere in the Description of the Plan (need to change the operand to contains rather than begins with, as in the screen shot above)
   - Select the Academic Plan Type in conjunction with the Description (In the screen shot above, Major was chosen.)

4. Then click the button.

5. To clear the information you entered into the fields on this page, click the button.
When the Search Results display, click on the link for the Plan of your choice. Be sure to choose a Plan that is for the appropriate Academic Program.

Any Descriptions that have an asterisk * before and after them are for inactive Plans that should not be assigned to a student unless prior approval from the Department Chair has been obtained.

You will be returned to the Add New Plan page, and the code for the Academic Plan of your choice will display in the Academic Plan field.

The Requirement Term will default in based on the current date. You may change the Requirement Term.

The Declare Date represents the date the plan is added and will default in with the current date. You do not have access to change the Declare Date.

If the button is not visible on the Add New Plan page, |tab| out of the field where your cursor displays. Click the button to complete the process, or, if you have changed your mind, click the button to abort the process. You will be returned to the Maintain Acad Plans page.
11. Your changes will show up on the **Maintain Acad Plans** page as soon as you click the button.

12. If a student Plan has Specializations attached to it, you may add a specialization after declaring the Plan. You will know you can do this if you see the **Add Specializations** link in the row where the Plan is listed. Refer to the directions in section 1.4 below.

13. To assign an advisor to a Plan, refer to the directions in section 1.6 below.

14. To enter Plan or Advisor information for a different student, click the button to return to the search page for **Maintain Academic Plans**. Return to the **Steps for Locating the Student** in section 1.0 above.

**Tips for Adding a New Plan When the Plan Code is Known:**

1. Enter the code for the **Academic Plan** of your choice on the **Add New Plan** page.
2. **Tab** out of the field where your cursor is displayed.
3. Doing so will reveal the **Add Academic Plan**.

4. The **Requirement Term** will default in based on the current date. You may change the **Requirement Term**.

5. The **Declare Date** represents the date the plan is added and will default in with the current date. You do not have access to change the **Declare Date**.

6. Click the **Add Academic Plan** to complete the process, or, if you have changed your mind, click the **Cancel** button to abort the process. You will be returned to the **Maintain Acad Plans** page.

7. Your changes will show up on the **Maintain Acad Plans** page as soon as you click the **Refresh** button.

8. If a student Plan has Specializations attached to it, you may add a specialization after declaring the Plan. You will know you can do this if you see the **Add Specializations** link in the row where the Plan is listed. Refer to the directions in section 1.4 below.

9. To assign an advisor to a Plan, refer to the directions in section 1.6 below.

10. To enter Plan or Advisor information for a different student, click the **Return to Search** button to return to the search page for **Maintain Academic Plans**. Return to the **Steps for Locating the Student** in section 1.0 above.
1.2 Updating a Plan

Navigation:  
Main Menu > Campus Solutions > CWU Student Administration > Student Records > Student Career Information > Maintain Academic Plans

If you have not already accessed the Maintain Acad Plans page, follow the directions in section 1.0 above to do so.

![Maintain Acad Plans](image)

Steps for Updating a Plan:

1. You do not need to Delete a Plan to replace it with a new one. You can use the Edit Plan link to replace a Plan.

2. You should only be modifying Plans that are maintained by your department.

1. Click on the Edit Plan link for the Plan to which you wish to make the change, even if the only Plan listed is Undeclared.

![Change/Add Plan](image)

2. On the Change/Add Plan page, make changes to the Academic Plan code and/or the Requirement Term. The same options are available for looking up an Academic Plan on the Change/Add Plan page as those described in section 1.1.1 above.
3. The code for the Academic Plan of your choice will display in the Academic Plan field.

4. The Requirement Term will default in based on the current date. You may change the Requirement Term. If the Requirement Term you need to enter is before the Admit Term, an error will pop up. It will not prevent the Requirement Term from being changed. "Warning -- Required term must be greater than Admit Term – XXXX The PeopleCode program executed a Warning statement, which has produced this message."

5. The Declare Date represents the date the plan is added and will default in with the current date. You do not have access to change the Declare Date.

6. If the Add Academic Plan button is not visible on the Change/Add Plan page, [tab] out of the field where your cursor displays. Click the Add Academic Plan to complete the process, or, if you have changed your mind, click the Cancel on to abort the process. You will be returned to the Maintain Acad Plans page.

7. Your changes will show up on the Maintain Acad Plans page as soon as you click the button.

   If the student had previously been Undeclared, the RMJ service indicator will be lifted for the student.

8. To assign an advisor for the Plan you just edited, refer to the directions in section 1.6 below.
If there was an Advisor assigned to the Plan you just edited, the original Advisor will NOT automatically be deleted with the editing of the Plan. Go to the Student Advisor page (Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor) to remove the original Advisor. If you do not remove the original Advisor, the student will continue to show up on that Advisor’s list of Advisees. For more information regarding the deletion of an Advisor, refer to the document entitled “Maintaining a Student’s Advisor.”

9. To enter Plan or Advisor information for a different student, click the button to return to the search page for Maintain Academic Plans. Return to the Steps for Locating the Student in section 1.0 above.

### 1.3 Deleting a Plan

**Navigation:** Main Menu > Campus Solutions > CWU Student Administration > Student Records > Student Career Information > Maintain Academic Plans

If you have not already accessed the Maintain Acad Plans page, follow the directions in section 1.0 above to do so.

**Steps for Deleting a Plan:**

1. Click the button next to the plan you wish to remove. See the Caution note below.

If it is the only plan listed, you will not be allowed to delete the plan but must click the Edit Plan link instead. You may use the Edit Plan link to assign the Undeclared plan (UNDEC). If you need to edit a plan, refer to the directions in section 1.2 above.
2. Read any messages that may appear carefully; click the [DELETE ACADEMIC PLAN] button to delete the Plan or [CANCEL] button to return to the Maintain Acad Plans page without making the change.

3. Your changes will show up on the Maintain Acad Plans page as soon as you click the [Refresh] button.

If there was an [Advisor] assigned to the Plan you just deleted, the original Advisor will NOT automatically be deleted with the deletion of the Plan. Go to the [Student Advisor] page (Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor) to remove the original Advisor. If you do not remove the original [Advisor], the student will continue to show up on that Advisor's list of Advisees. For more information regarding the deletion of an Advisor, refer to the document entitled "Maintaining a Student's Advisor."

4. To enter Plan or Advisor information for a different student, click the [Return to Search] button to return to the search page for Maintain Academic Plans. Return to the [Steps for Locating the Student] in section 1.0 above.
1.4 Adding a First Specialization (Sub-Plan)

Navigation: Main Menu > Campus Solutions > CWU Student Administration > Student Records > Student Career Information > Maintain Academic Plans

If you have not already accessed the Maintain Acad Plans page, follow the directions in section 1.0 above to do so.

![Maintain Acad Plans](image)

Steps for Adding a First Specialization (Sub-Plan):

1. Click on the Add Specializations link for the plan to which you wish to add a specialization.

![Specializations](image)

2. If you decide you do not wish to add a Specialization, click the on. Doing so will return you to the Maintain Acad Plans page. Return to the directions under Options Available Under Maintain Acad Plans in section 1.0 above.

3. To look up the available Sub-Plan options for the Plan, click the magnifying glass on the Specializations page.
4. To exit the Look Up Specialization page without looking up the Academic Sub-Plan, click the Cancel button. Return to the directions under Steps for Adding a First Specialization (Sub-Plan) above.

5. To view the Specialization choices, click the Look Up button on the Look Up Specialization page.

6. Then click on the link for the Academic Sub-Plan of your choice from the Search Results.

   Any Descriptions that have an asterisk * before and after them are for inactive Sub-Plans that should not be assigned to a student unless prior approval from the Department Chair has been obtained.

7. Click the Add Specialization button to complete the process, or, if you have changed your mind, click the Cancel button to abort the process. You will be returned to the Maintain Acad Plans page.
8. Click the button.

9. If you completed the Add Specializations process, you will notice that the Add Specializations link will now display as a View Specializations link on the Maintain Acad Plans page.

If you click on the View Specializations link, you might notice that the Declare Date for the Specialization will be the same date as the Declare Date for the Major to which that Specialization is tied.

10. To enter Plan or Advisor information for a different student, click the button to return to the search page for Maintain Academic Plans. Return to the Steps for Locating the Student in section 1.0 above.

1.5 Updating, Deleting or Adding a Subsequent Specialization (Sub-Plan)

Navigation: Main Menu > Campus Solutions > CWU Student Administration > Student Records > Student Career Information > Maintain Academic Plans

If you have not already accessed the Maintain Acad Plans page, follow the directions in section 1.0 above to do so.
Steps for Updating, Deleting or Adding a Subsequent Specialization (Sub-Plan):

1. Click on the View Specializations link for the plan with the Specialization you wish to update, delete or add to.

2. To add another Specialization, proceed to section 1.5.1 Adding a Subsequent Specialization (Sub-Plan).

3. To change a Specialization, proceed to section 1.5.2 Updating a Specialization (Sub-Plan).

4. To delete a Specialization, proceed to section 1.5.3 Deleting a Specialization (Sub-Plan).

1.5.1 Adding a Subsequent Specialization (Sub-Plan)

If you have not accessed the Specializations page, refer to the directions in section 1.5 above.

1. If you decide you do not wish to add a Specialization, click the button. Doing so will return you to the Maintain Acad Plans page. Return to the directions under Options Available Under Maintain Acad Plans in section 1.0 above.
2. To add another **Specialization**, click the **ADD SPECIALIZATION** button.

3. If you decide you do not wish to add a **Specialization**, click the **CANCEL** button. Doing so will return you to the **Specializations** page. Return to the directions at the beginning of section 1.5.1 above.

4. To look up the available **Sub-Plan** options for the **Plan**, click the magnifying glass on the **Specializations** page.

5. To exit the **Look Up Specialization** page without looking up the Academic Sub-Plan, click the **Cancel** button. Return to the directions that go with the **Specializations** page above.

6. Otherwise, click the **Look Up** button to view Sub-Plan choices.
7. Then click on the link for the Academic Sub-Plan of your choice from the Search Results.

Any Descriptions that have an asterisk * before and after them are for inactive Sub-Plans that should not be assigned to a student unless prior approval from the Department Chair has been obtained.

8. The Specializations page will display the code for the Specialization that you chose. If you have changed your mind and wish to abort the process, click the Cancel button. You will be returned to the Specializations page. Return to the directions at the beginning of section 1.5.1 above.

9. If you wish to keep the Specialization you chose, click the Add Specialization button.
10. Then click the **CANCEL** button on the **Specializations** page.

11. As soon as you click the **button on the **Maintain Acad Plans** page, you will notice that the number of Specializations listed will be updated to reflect the change(s) you made.

If you click on the **View Specializations** link, you might notice that the **Declare Date** for the Specialization will be the same date as the **Declare Date** for the Major to which that Specialization is tied.

12. To enter Plan or Advisor information for a different student, click the **Return to Search** button to return to the search page for **Maintain Academic Plans**. Return to the **Steps for Locating the Student** in section 1.0 above.

### 1.5.2 Updating a Specialization (Sub-Plan)

If you have not accessed the **Specializations** page, refer to the directions in section 1.5 above.
9.0 Maintaining a Student’s Plan, Sub-Plan and Advisor

1. If you decide you do not wish to change a Specialization, click the CANCEL button. Doing so will return you to the Maintain Acad Plans page. Return to the directions under Options Available Under Maintain Acad Plans in section 1.0 above.

2. To make a change to a Specialization, click the CHANGE SPECIALIZATION button.

3. Enter the code for the new Specialization in the Change To field that displays, and then press Tab out of the field. Continue with the next step below.

   Or, if you do not know the code for the new Specialization, click the magnifying glass to display the options. On the Look Up Change To page, click the LookUp button and then click on the Specialization of your choice in the Search Results.

   The asterisk * before and after any Descriptions indicates that those Academic Sub-Plans are inactive and should not be assigned to any students without prior approval from the Department Chair.

   The Descriptions that have an asterisk * before and after them are for inactive Sub-Plans that should not be assigned to a student unless prior approval from the Department Chair has been obtained.
9.0 Maintaining a Student's Plan, Sub-Plan and Advisor

4. You will be returned to the Specializations page, and the code for the Specialization you chose will populate the Change To field.

5. Click the button, or, if you have changed your mind and do not wish to save the changes, click the button.

6. You will be returned to the Maintain Acad Plans page, where you will want to click the button.

7. If you wish to check to make sure that the Specialization change has taken place, click on the View Specializations link once more.
9.0 Maintaining a Student’s Plan, Sub-Plan and Advisor

8. The new Specialization will display on the Specializations page.

9. Click the button to return to the Maintain Acad Plans page.

10. To enter Plan or Advisor information for a different student, click the button to return to the search page for Maintain Academic Plans. Return to the Steps for Locating the Student in section 1.0 above.

### 1.5.3 Deleting a Specialization (Sub-Plan)

If you have not accessed the Specializations page, refer to the directions in section 1.5 above.

1. If you decide you do not wish to delete a Specialization, click the button. Doing so will return you to the Maintain Acad Plans page. Return to the directions under Options Available Under Maintain Acad Plans in section 1.0 above.

2. To remove a Specialization, click the button.
3. You will be returned to the Maintain Acad Plans page, where your changes will show up as soon as you click the **Refresh** button. In the screen shot above, the number of Specializations listed for Mathematics (BS) is now 0.

4. To enter Plan or Advisor information for a different student, click the **Return to Search** button to return to the search page for Maintain Academic Plans. Return to the **Steps for Locating the Student** in section 1.0 above.

### 1.6 Adding an Advisor

**Navigation:** [Main Menu > Campus Solutions > CWU Student Administration > Student Records > Student Career Information > Maintain Academic Plans](#)

If you have not already accessed the Maintain Acad Plans page, follow the directions in section 1.0 above to do so.

1. Click on the **Assign Advisor** link for the Plan for which you wish to assign an advisor.
2. On the **Student Advisor** page that appears, click the dropdown arrow to choose the Advisor Role.

3. Then, if you know the advisor’s 8-digit ID number, enter it into the **Academic Advisor** field. If you do not know the advisor’s ID number, you will need to look the advisor up by **Last Name** and possibly **First Name** (or at least two characters of it) using the magnifying glass to the right of the **Academic Advisor** field.

**PLEASE NOTE:** If you need to add more than one Advisor for a particular Plan, you must do so through **Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor**. Refer to the document entitled “Maintaining a Student’s Advisor” for more information.

**CAUTION:** 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.

4. If the **Assign Selected Advisor** button is not visible on the **Student Advisor** page once the advisor’s ID number is in the **Academic Advisor** field, [tab] out of the field where your cursor displays. Then click the **Assign Selected Advisor** button to complete the process, or, if you have changed your mind, click the **Cancel** button to abort the process.
5. On the **Maintain Acad Plans** page, any changes you have made to the student’s Advisor information will display as soon as you click the **Return to Search** button.

**PLEASE NOTE:** If you add, delete or update information regarding an Advisor through Main Menu > Campus Solutions > 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.

6. To enter Plan or Advisor information for a different student, click the **Return to Search** button to return to the search page for **Maintain Academic Plans**. Return to the **Steps for Locating the Student** in section 1.0 above.

**1.7 Deleting an Advisor**

**PLEASE NOTE:** If you need to delete a student’s Advisor, you must go to the **Student Advisor** page (Main Menu > Campus Solutions > Records and Enrollment > Student Background Information > Student Advisor) to remove the Advisor. **If you do not remove the Advisor through the Student Advisor page, the student will continue to show up on that Advisor’s list of Advisees.** For more information regarding the deletion of an Advisor, refer to the document entitled **“Maintaining a Student’s Advisor.”**