PeopleSoft 9.0 Assign an Advisor to a Student

NEW

| Intended Audience:	University faculty and staff (academic advisors and the folks who support them) with administrative (full-service) access to PeopleSoft Student Records, specifically update access to this page:			
Navigation:	Module: Records and Enrollment	**Access Page:**	Step 1: Log in to PeopleSoft Step 2: Navigate to Student Advisor Step 3: Enter a student ID	
	Folder: Student Background Information	**Assign an Advisor:**	Step 4: Select an active career/program/plan Step 5: Enter advisor ID Step 6: Select approval boxes & save	
	Page: Student Advisor	**More Resources:**	Get help	
Page Mode:	Find an Existing Value	**PS Training:**	PS101 Introduction to PeopleSoft Administration SE202 Enrolling Students in PeopleSoft	

In version 9.0, the page link for assigning advisors to students did not change. It is still called Student Advisor and lives in the same folder, Student Background Information.

When you assign advisors to students in version 9.0, only active advisors have access to student (*advisee*) information. Advisors are considered active based on the most recent effective-dated row on the Student Advisor page.

> If you intend to process a change of major AND assign a new advisor, do so in that order so the career track selections on the **Student Advisor** page reflect the newly saved career, program, plan, and sub-plan.
>
> Refer to the *Change a major quick guide* for more details.

1. Log in to PeopleSoft

Click the PeopleSoft Login link from your **My Pitt** (my.pitt.edu) home page:

PeopleSoft Login
Login to the University of Pittsburgh's student administration system.
Learn More
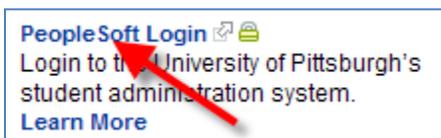
1. Log in to **My Pitt**
2. Click **PeopleSoft Login**

> **The permission lists tied to your current user name have been migrated (moved) to the new PeopleSoft, so your security access will be the same as it was in version 8.9.**

2. Navigate to Student Advisor

Navigate to the **Student Advisor** page:

1. Click **Records and Enrollment**
2. Click **Student Background Information**
3. Click Student Advisor

3. Enter the Student ID

On the **Find an Existing Value** page:

1. Enter the student **ID**
2. Click Search

4. Review the Active Advisor(s)

If an academic advisor has already been assigned, the advisor's ID and name will display near the bottom of the page. Advisor assignments are effective-dated, which means that only active advisor IDs and active student program/plan fields (career, program, and plan) can be selected at the time of assignment. An advisor's role can be reviewed at Curriculum Management>Instructor/Advisor Information>Instructor /Advisor Table.

Once an advisor is assigned to a student, two things happen in **Self Service**:

   a) The advisor's name displays on the advisee's **Student Center**, and
   b) The student's name appears in the advisor's **My Advisees** list.

Inactive Advisors

When a new advisor is assigned with a more recent effective date, that new advisor can view his/her new advisee as long as both are active in PeopleSoft. However, the student's name drops off the **My Advisees** list for all prior advisors.
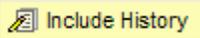
Click **Include History** to view prior advisors with earlier effective dates.

Inactive Advisees

When the student graduates (or is otherwise *inactivated* in PeopleSoft), his/her name also disappears from the advisor's **My Advisees** page.

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5. Change a Student's Advisor

When a student is assigned a new advisor, record the change in PeopleSoft with a new, effective-dated row on the Student Advisor page. These changes may be prompted by a student transferring schools (program changes), changes of major (plan changes), or advisor retirements (changing advisors).

If no advisor assignment exists for this student, skip to section six and follow the steps to assign a new advisor.

Follow these steps to change an advisor:

Step	Action
a	Click ⊞ to the right of the effective date to add a new row:

*Academic Institution:	UPITT 🔍	University of Pittsburgh
*Effective Date:	10/26/2010 📅	⊞ ⊟

This new row is a duplicate of the last stored record. All career track and advisor fields will copy from the previous row. To make changes to the career, program, or plan, update steps b, c, and d, respectively.

Step	Action
b	If needed, update **career** or click 🔍 to select an active career for this student
c	If needed, update **program** or click 🔍 to look up an active program for this student
d	If needed, update **plan** or click 🔍 to look up an active plan for this student

Individual Advisor or Committee?

Academic advisors can be assigned to students individually or in groups (by committee). If the student will be advised individually, continue to step e. If advised by a committee, continue to step f, below.

Step	Action
e *(Individual Advisor)*	If your student will be advised by a committee instead of an individual advisor, skip to step f, below -OR- If needed, update the advisor's PeopleSoft **ID** or click 🔍 to look up all active advisors within the student's selected career track, select **Must Approve Enrollment** and **Must Approve Graduation**, and skip to step g

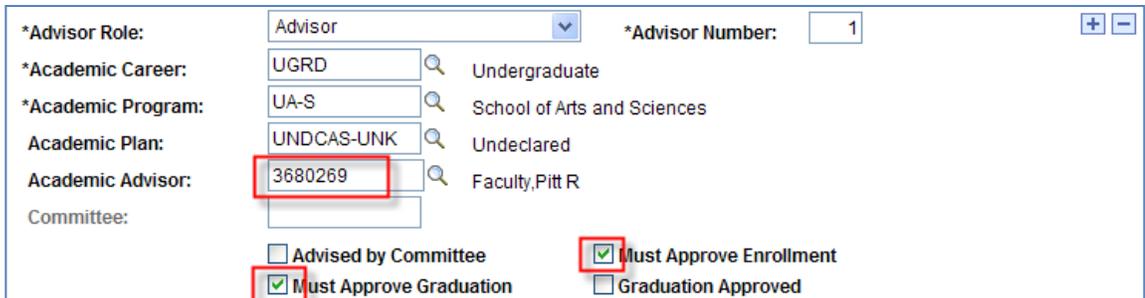|			
*Advisor Role:	Advisor ▼	*Advisor Number:	1 ⊞ ⊟
*Academic Career:	UGRD 🔍	Undergraduate	
*Academic Program:	UA-S 🔍	School of Arts and Sciences	
Academic Plan:	UNDCAS-UNK 🔍	Undeclared	
Academic Advisor:	3680269 🔍	Faculty,Pitt R	
Committee:			
	☐ Advised by Committee	☑ Must Approve Enrollment	
	☑ Must Approve Graduation	☐ Graduation Approved	

Note: *If the advisor's ID is not listed, s/he does not have an advisement role in PeopleSoft. Contact your departmental administrator.*

Step	Action
f *(Advising Committee)*	To assign your student to an advising committee, if needed, select the **Advised by Committee** checkbox and enter/update the **committee** name *Advisor Role:* Advisor *Advisor Number:* 2 [+][−] *Academic Career:* UGRD 🔍 Undergraduate *Academic Program:* UA-S 🔍 School of Arts and Sciences Academic Plan: 🔍 Academic Advisor: Committee: ANTH 🔍 Anthropology ☑ Advised by Committee ☐ Must Approve Enrollment ☐ Must Approve Graduation ☐ Graduation Approved
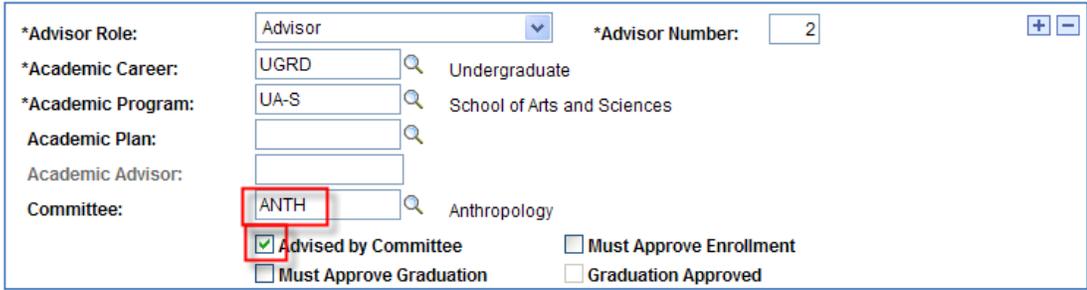
Add another Advisor or Committee

If the student has multiple academic advisors (i.e. has a double major) or is being advised by an individual advisor and an advising committee, use the [+] to the right of the advisor number to add more rows within this effective date. Then follow the steps in section 6 to add a new advisor or committee.

Step	Action
g	Click the lower **View All** (just above Advisor Number). This displays all advisor records on the same page. **Note:** *To remove excess advisor rows, click the lower [−] to the right of each advisor who is no longer appropriate.*
h	When you are satisfied with the advisor assignment(s), click 💾 Save
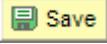
The new connection between student and advisor is *instantly* available in Self Service. To assign another student to this advisor, click 🔍 Return to Search and repeat these steps using a different student ID.

6. Assign an Advisor to a New Student

If the student has not yet been assigned an advisor, there is no need to add a new row.

Follow these steps to assign an advisor to a student who has no previous advisor assignment:

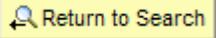| Step	Action
a	Enter the student's **academic career** or click 🔍 to look up an active career for this student
b	Enter the **academic program** or click 🔍 to look up an active program for this student
c	Enter the appropriate **plan** or click 🔍 to look up an active plan for this student

Step	Action
d	Click the appropriate approval checkboxes: To assign an individual advisor, click **Must Approve Enrollment** and **Must Approve Graduation** To assign a committee, click **Advised by Committee**
e *Individual Advisor:* *Advising Committee:*	Assign the advisor or committee: To assign an advisor, enter the academic advisor's PeopleSoft **ID** or click 🔍 to look up all active advisors within the student's selected career track (above) **Note:** *If the advisor's ID is not listed here, s/he does not have an advisement role in PeopleSoft. Contact your departmental administrator.* **Advisor Role:* Advisor **Advisor Number:* 1 **Academic Career:* UGRD Undergraduate **Academic Program:* UA-S School of Arts and Sciences Academic Plan: UNDCAS-UNK Undeclared Academic Advisor: 3680269 Faculty,Pitt R Committee: ☐ Advised by Committee ☑ Must Approve Enrollment ☑ Must Approve Graduation ☐ Graduation Approved To assign your student to an advising committee: If needed, select the Advised by Committee checkbox and enter/update the **committee** name **Advisor Role:* Advisor **Advisor Number:* 2 **Academic Career:* UGRD Undergraduate **Academic Program:* UA-S School of Arts and Sciences Academic Plan: Academic Advisor: Committee: ANTH Anthropology ☑ Advised by Committee ☐ Must Approve Enrollment ☐ Must Approve Graduation ☐ Graduation Approved
f	If the student has multiple advisors or a committee and an advisor, assign another advisor to this student by clicking the lower ➕ to the right of the advisor number and repeat steps a-e for each new row
g	Click the lower **View All** (just above Advisor Number). This displays all advisor records on the same page. **Note:** *To remove excess advisor rows, click the lower ➖ to the right of each advisor who is no longer appropriate.*
h	Click 💾 Save

The new assignment is *instantly* available in Self Service to the student and the advisor. To assign another student to this advisor, click 🔍 Return to Search and repeat these steps using a different student ID.

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This example shows, in View All mode, an advisor and a committee assigned to one student:

Where to Find Help

Change of major: Refer to the *Change a major quick guide* for detailed information about how to update a Student Program/Plan.

Advisor role: Refer to the Instructor/Advisor Table if the advisor ID does not display as a valid value in the Student Advisor field located at Curriculum Management>Instructor/Advisor Information> Instructor/Advisor Table.

Technical questions about PeopleSoft, including trouble with your username or password, can be directed to the Technology Help Desk at 412 62**4-HELP** [4357]. The Help Desk is available 24 hours a day, seven days a week.

Questions about University business policies or procedures for career track maintenance or assigning advisors should be directed to your campus Office of the Registrar.

*Locate this and other PS Training help sheets on the **Documents** page of our portal community at My Pitt.*