

# ASSIGNING ADVISORS TO A STUDENT

## TABLE OF CONTENTS

Revision History .....	2
Introduction and Purpose .....	2
Related Policies, Regulations, Guiding Principles, and Common Practices .....	2
Impacted Departments, Units, Programs, and Centers .....	2
Before You Begin.....	2
pages.....	3
Procedures .....	3
<b>ASSIGNING AN ADVISOR</b> .....	3
How to Assign an Advisor When No Existing Advisors Are Listed.....	3
How to Assign an Advisor When Existing Advisors Are Listed .....	4
Check Your Understanding.....	5
<b>REMOVING AN ADVISOR</b> .....	5
How to Remove an Advisor When No Existing Advisors Are Listed .....	5
How to Remove an Advisor When Existing Advisors Are Listed .....	6
Check Your Understanding.....	6
<b>ADDING AN ADVISOR AND REMOVING AN EXISTING ADVISOR</b> .....	7
How to Add an Advisor and Remove an Existing Advisor at the Same Time - Term is Equal to From Term.....	7
How to Add an Advisor and Remove an Existing Advisor at the Same Time - Term is Not Equal to From Term.....	8
Check Your Understanding.....	9
<b>CHANGING THE PRIMARY ADVISOR DESIGNATION OR ADVISOR TYPE</b> .....	9
How to Change the Primary Advisor Designation or Advisor Type for Advisors Already Assigned to the Student .....	9
Check Your Understanding.....	10

## REVISION HISTORY

Version	Date	Name	Description
	7/3/18	Gabby O.	Banner 9 updates.

## INTRODUCTION AND PURPOSE

The purpose of this document is to explain how advisors are assigned to and removed from student records. The page is term driven and will record a history of advisors the student had in prior terms. Multiple advisor types can be assigned to a student and multiple advisors of the same type can be assigned to students.

## RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Colleges and offices utilizing advisor assignment in Banner are responsible for maintaining the assignments.
  - a. Several colleges have defined rules (i.e. by major, etc.) to automatically assign all new students an advisor via a job. The mass assignment of advisors according to these rules is managed by ITS. The Colleges and Offices are responsible for communicating updates to their rules and advisor names when staff changes occur.
  - b. If it is requested that the mass advising job is run for a college(s) to adjust for large changes in advisors, please note that it will override any manual updates.
2. Offices must not change advisor assignments for other groups. If you feel that a change should be made, please contact the office to which the advisor belongs.
3. The primary advisor indicated in Banner displays to students in self-service. Consult your department's policy for marking a primary advisor.

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Graduate Division Academic Affairs
2. Graduate Program Coordinators
3. College Staff
4. Learning Community Staff
5. Faculty Advisors

## BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

## PAGES

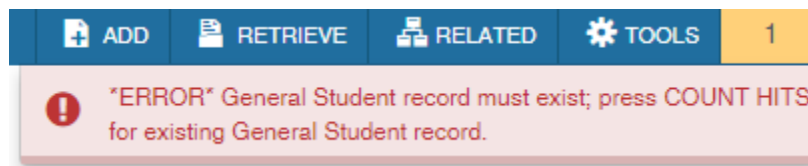
The pages listed below are covered in this training.

Page	Page Name	Description
SGAADVR	Multiple Advisors	Update by adding, deleting, changing advisor type, or maintenancing advisors.

## PROCEDURES

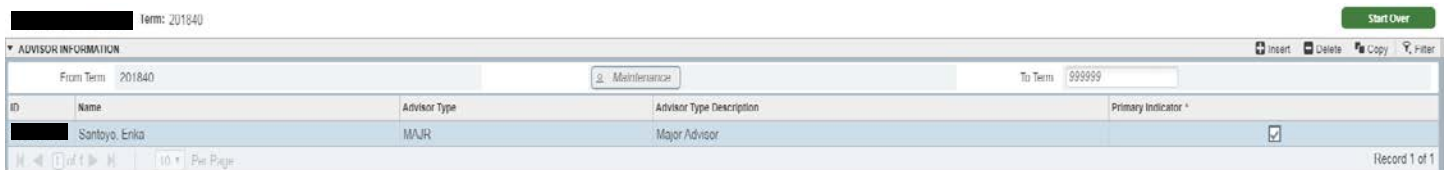
### ASSIGNING AN ADVISOR

**Note:** Advisors can only be added to students who have a General Student (SGASTDN) record for the term you entered. If you receive an error like the one below, that is an indication that the student does not have a SGASTDN record.



### HOW TO ASSIGN AN ADVISOR WHEN NO EXISTING ADVISORS ARE LISTED

- Go to **SGAADVR**.
- Enter the **SID**.
- Enter the **effective term** the student is being assigned to the advisor. Click Go.
  - Note: The term you enter will become the From Term, and this means it is the term the advisor assignment is effective. The To Term is 999999, or the End of Time; it will stay 999999 until the advisor is changed. Once the advisor has been changed, the To Term will be the term the advisor assignment is no longer effective.
- If there are no other Advisors listed, proceed.
- In the **ID field**, enter the ID of the advisor. Ensure that the correct name appears. If you are unsure of the ID number, use the button to query for the advisor by name.
- Tab to the **Advisor Type field** and select the appropriate advisor type.
- Ensure that the student has one **primary advisor** which is indicated by the check box.
- Save**.



## HOW TO ASSIGN AN ADVISOR WHEN EXISTING ADVISORS ARE LISTED

1. Go to **SGAADVR**.
2. Enter **SID**.
3. Enter **effective term** the advisor is being assigned to the student, go.
  - a. Note: The term you enter will become the From Term, and this means it is the term the advisor assignment is effective. The To Term is 999999, or the End of Time; it will stay 999999 until the advisor is changed. Once the advisor has been changed, the To Term will be the term the advisor assignment is no longer effective.
4. If there is at least one advisor already listed on the student's record, proceed.
  - a. Note: If the To Term is *not* equal to 999999, then this block has already been maintained and you will need to add the advisor to additional SGAADV records that have different term ranges. Proceed with these instructions through step 9; then click **start over** and enter the term that you see in the To Term. Repeat steps 3 through 9 for this student's record until the advisor is assigned to the student's record where the To Term is equal to 999999.
5. If the term you entered in #3 is **equal** to the From Term, click **Insert**. In the ID field, enter the ID of the advisor. Ensure that the correct name appears. If you are unsure of the ID number, use the button to query for the advisor by name. Skip to step 8.

Multiple Advisors SGAADV1 9.3.5 (PPHDXE)

ID: [Redacted] Term: 201640 Confidential

Start Over

ADVISOR INFORMATION

From Term: 201640 Maintenance To Term: 999999

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
[Redacted]	Nollany, Linda L.	MAJR	Major Advisor	<input checked="" type="checkbox"/>
[Redacted]	Butler, Michelle D.	MAJR	Major Advisor	<input type="checkbox"/>

Record 2 of 2

6. If the term you entered in step 3 occurs **later than** the From Term, select the **maintenance button**. A pop-up window opens with 2 choices: End Advisor or Copy Advisor. **Choose Copy Advisor** to continue the presence of the existing Advisor(s).

[Redacted] Term: 201640 Confidential

Start Over

ADVISOR INFORMATION

From Term: 201640 Maintenance To Term: 999999

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
[Redacted]	Nollany, Linda L.	MAJR	Major Advisor	<input checked="" type="checkbox"/>

Record 1 of 1

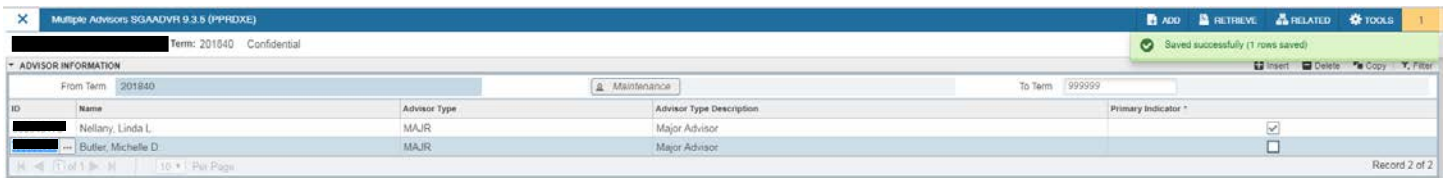
Option List

**Copy Advisor**

End Advisor

Cancel

7. Click **Insert** and enter the **ID** of the advisor. Ensure that the correct name appears. If you are unsure of the ID number, use the button to query for the advisor by name.
8. Tab to the **Advisor Type** field and select the appropriate code.
9. Ensure that the student has one **primary advisor** which is indicated by the check box.
10. **Save**.



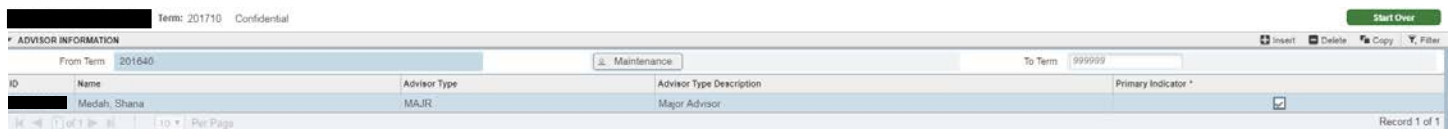
## CHECK YOUR UNDERSTANDING

1. The effective term you enter will become the From Term, and this means it is the term the advisor assignment is effective. TRUE
2. The Primary Advisor check box should be marked for:
  - i. A) the major advisor always
  - ii. B) based on the department’s policy
  - iii. Answer: B
3. Can an advisor be assigned to a person who does not have an active student record for that term? YES or NO
  - i. Answer: NO
4. The Maintenance button and Copy Advisor function is used when adding an advisor when one or more already exist. TRUE

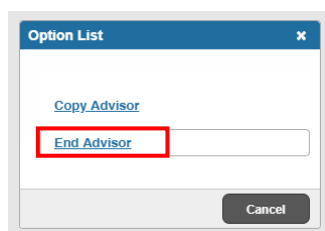
## REMOVING AN ADVISOR

### HOW TO REMOVE AN ADVISOR WHEN NO EXISTING ADVISORS ARE LISTED

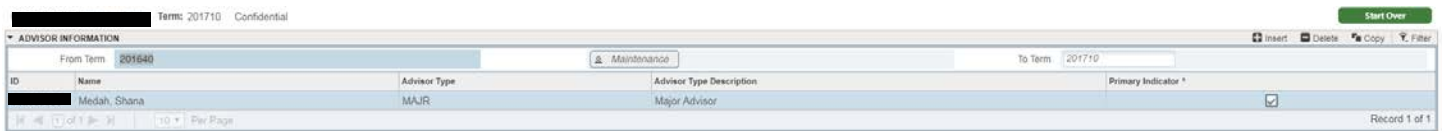
1. Go to **SGAADVR**.
2. Enter **SID**, tab.
3. Enter the **term** the advisor is to be removed from the student’s record.
  - a. In the example below, the advisor is being removed in Winter 2017, after 1 term of being assigned to the student and will reflect that the advisor was only assigned to the student for 1 term.
  - b. The term you enter should be the term that *immediately follows* the last term the advisor was assigned to the student. For example, if the last term the advisor was assigned to the student was 201640, then enter 201710.



4. If there are no other Advisors on the record, proceed.
5. Select the **maintenance button**. A pop-up window presents 2 options: Copy Advisor or End Advisor. **Choose End Advisor**.

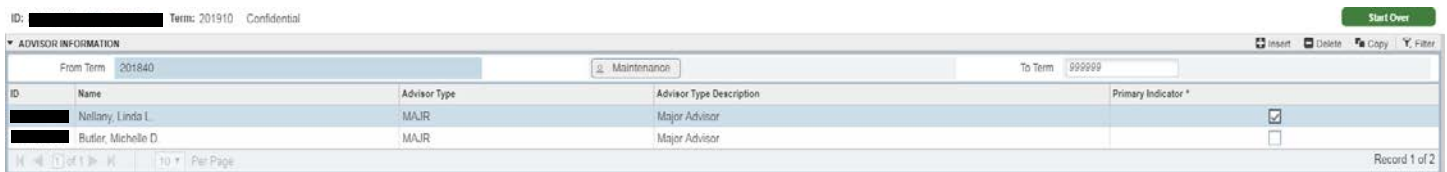


6. Banner will automatically place the term you entered into the To Term field and save for you. Exit the page.

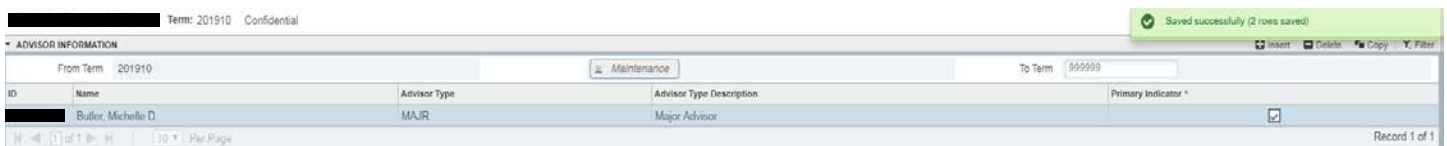
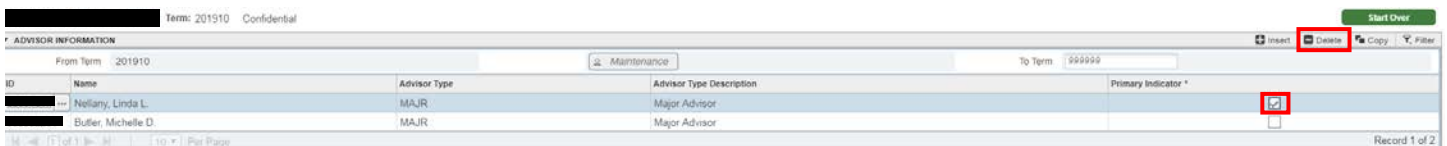


### HOW TO REMOVE AN ADVISOR WHEN EXISTING ADVISORS ARE LISTED

1. Go to **SGADV**.
2. Enter **SID**, tab.
3. Enter the **term** the advisor is to be removed from the student's record.
  - a. In the example below, the advisor is being removed in Fall 2018, after 1 term of being assigned to the student and will reflect that the advisor was only assigned to the student for 1 term.
  - b. The term you enter should be the term that *immediately follows* the last term the advisor is assigned to the student. For example, if the last term the advisor is assigned to the student was 201840, then enter 201910.



4. If there are at least two advisors on the record, proceed.
5. Select the **maintenance button**. A pop-up window presents 2 options: Copy Advisor or End Advisor. **Choose Copy Advisor** to continue the other Advisor(s) on the student's record.
6. Highlight the Advisor that you are removing.
7. On right corner, select **Delete**.
8. Ensure there is one advisor marked **primary** which is indicated by the check box.
9. **Save**.



### CHECK YOUR UNDERSTANDING

1. You should only ever use the Maintenance button and End Advisor function when there are no other advisors on the record that need to be maintained. **TRUE**
2. If you want to remove one of several advisors, you should Record Remove and Remove the advisor before pressing the Maintenance button? **FALSE**
  - i. To preserve the other advisors you must first press the Maintenance button. Once you have done that then you can Record Remove and Remove your advisor.

3. If you see a wrong advisor listed for a student for another area, you should update the system to ensure the record is correct? FALSE
  - i. You should not update advisors that are not for your area. Please contact the appropriate person to ensure the student’s record is updated correctly.

## ADDING AN ADVISOR AND REMOVING AN EXISTING ADVISOR

### HOW TO ADD AN ADVISOR AND REMOVE AN EXISTING ADVISOR AT THE SAME TIME - TERM IS EQUAL TO FROM TERM

1. Go to **SGAADVR**.
2. Enter **SID**, tab.
3. Enter the **term** the student is to be assigned to an advisor and have another advisor removed from his/her record.
  - a. In this example the student is being removed in the same term they are assigned another advisor, the term you enter should be *equal* to the From Term (which you can see and confirm as seen below).

Term: 201840

From Term: 201840

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
	Lea, Nakita R.	MAJR	Major Advisor	<input checked="" type="checkbox"/>

4. You should see the advisor that the student is being removed from. There may be other advisors on the student’s record.
5. Click **Insert**. Add the **new advisor code**. Ensure that the correct name appears. If you are unsure of the ID number, use the button to query for the advisor by name.
6. Tab to the **Advisor Type** field and select the appropriate code.
7. Ensure that the student has one **primary** advisor which is indicated by the check box.

Term: 201840

From Term: 201840

Saved successfully (2 rows saved)

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
	Barba, Cassandra L.	MAJR	Major Advisor	<input checked="" type="checkbox"/>
	Lea, Nakita R.	MAJR	Major Advisor	<input type="checkbox"/>

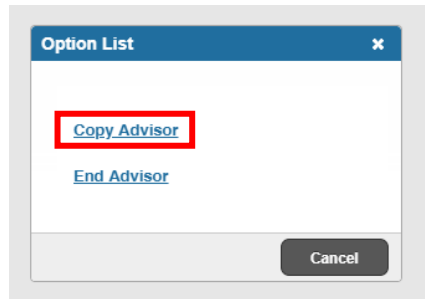
8. **Save**.
9. Click **Start Over** to enter new term.
10. Enter the term code that chronologically *follows* the term code you entered in step 3. For example, if the term entered in step 3 was 201840, the term to enter in this step is 201910. **Go**.

Term: 201910

From Term: 201840

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
	Barba, Cassandra L.	MAJR	Major Advisor	<input checked="" type="checkbox"/>
	Lea, Nakita R.	MAJR	Major Advisor	<input type="checkbox"/>

11. Select the **maintenance button**. A pop-up window presents 2 options: Copy ADVISOR or End ADVISOR. **Choose Copy ADVISOR** to continue the other ADVISOR(s) on the student's record.

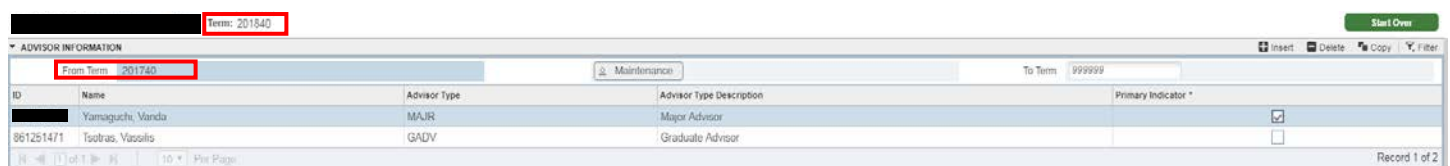


12. Highlight the advisor that you are removing from the student's record.
13. On right corner, select **Delete**.
14. **Save**.



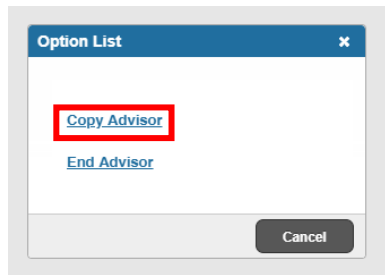
## HOW TO ADD AN ADVISOR AND REMOVE AN EXISTING ADVISOR AT THE SAME TIME - TERM IS NOT EQUAL TO FROM TERM

1. Go to **SGAADVR**.
2. Enter **SID**, tab.
3. Enter the **term** the advisor is to be removed from the student's record.
  - a. In this case because the student is being removed in a term later than the term the advisor was assigned to the student, the term you enter should be *after* the From Term (which you can see and confirm when you as below).



4. You should see the advisor that is being removed from the student's record. There may be other advisors on the student's record.
5. Select the **maintenance button**. A pop-up window presents 2 options: Copy Advisor or End Advisor. **Choose Copy Advisor** to continue the other attribute(s) on the student's record.





6. Click **Insert** enter **the ID** for the advisor being assigned to the student. Ensure that the correct name appears. If you are unsure of the ID number, use the button to query for the advisor by name.
7. Tab to the **Advisor Type** field and select the appropriate code.
8. Ensure that the student has one **primary** advisor which is indicated by the check box.
9. Navigate to the advisor that you are removing.
10. With the advisor highlighted that you are removing from the student's record, click **Delete** on right hand corner.
11. **Save**.

Term: 201840

Saved successfully (2 rows saved)

ADVISOR INFORMATION

From Term: 201840 To Term: 999999

Maintenance

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
[REDACTED]	Tacotas, Vassilis	GADV	Graduate Advisor	<input type="checkbox"/>
[REDACTED]	Eleris, Tina B.	MAJR	Major Advisor	<input checked="" type="checkbox"/>

Record 1 of 2

## CHECK YOUR UNDERSTANDING

1. Is this the correct order of steps to add a new advisor and remove an existing advisor? TRUE
  - Input Effective Term
  - Maintenance Button
  - Copy Advisors
  - Add New Advisor
  - Record Remove Old Advisor
  - Verify Primary Advisor
  - Save
2. Can a student have more than one primary advisor? Yes or No
  - i. Answer: NO

## CHANGING THE PRIMARY ADVISOR DESIGNATION OR ADVISOR TYPE

### HOW TO CHANGE THE PRIMARY ADVISOR DESIGNATION OR ADVISOR TYPE FOR ADVISORS ALREADY ASSIGNED TO THE STUDENT

1. Go to **SGAADVR**.
2. Enter **SID**, tab.
3. Enter the **effective term** you are changing the designation of the primary advisor or the advisor type. Go.
4. If the term you entered is equal to the From Term, simply make your changes to the existing advisor type field and primary check box. Ensure there is one primary advisor when you are finished. Skip to step 7.
5. If the term you entered is later than the From Term, click the **Maintenance button**. Two options will appear: Copy Advisor or End Advisor. Choose **Copy Advisor**.

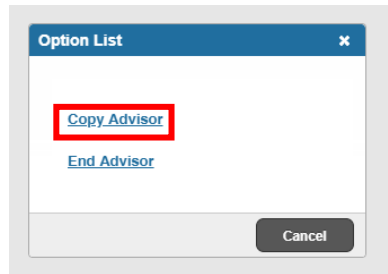
Term: 201840 Start Over

ADVISOR INFORMATION

From Term: 201740 Maintenance To Term: 999999

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
[REDACTED]	Singh, Leticia	MAJR	Major Advisor	<input checked="" type="checkbox"/>
[REDACTED]	Davis, Jermara C	GADV	Graduate Advisor	<input type="checkbox"/>

Record 1 of 2



6. Make your changes to the advisor type field and primary check box. Ensure there is one primary advisor when you are finished.
7. **Save.**

Term: 201840 Saved successfully (2 rows saved)

ADVISOR INFORMATION

From Term: 201840 Maintenance To Term: 999999

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
[REDACTED]	Singh, Leticia	COLL	College Advisor	<input type="checkbox"/>
[REDACTED]	Davis, Jermara C	GADV	Graduate Advisor	<input checked="" type="checkbox"/>

Record 1 of 2

### CHECK YOUR UNDERSTANDING

1. If your term equals the term in the From Term the Maintenance button will be greyed out. This means you cannot make updates? FALSE
  - i. If the terms are equal you do not have to use the Maintenance button but you can make updates to the page.
2. To make changes to the Advisor Type or Primary Indicator for a later term you should use the Maintenance button and then Copy Advisor. TRUE