

Adding and Changing Advisors

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Prior to any action with Advisors (IMPORTANT NOTE)

Navigation: Main Menu > Campus Community > Student Services Center

1. Before you add an advisor to an existing student, go to the Student Services Center – **academics tab**, and confirm their **current Program and Plan**. Make sure you are viewing the active career and program/plan.
2. If their current plan is correct, proceed to the Adding Advisors step.
3. If it a recent program/plan change has not yet been recorded in UDSIS ,**notify the Registrar's Office** to have it changed, or wait a few days until the change occurs.
4. **Do not go any further if the student is not listed as currently enrolled in your department according to their UDSIS record.**

Adding New Advisors

Navigation: Records and Enrollment > Student Background Information > Student Advisor

Favorites | Main Menu > Records and Enrollment > Student Background Information > Student Advisor

Student Advisor

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

ID: begins with 700000000 **1**

Campus ID: begins with

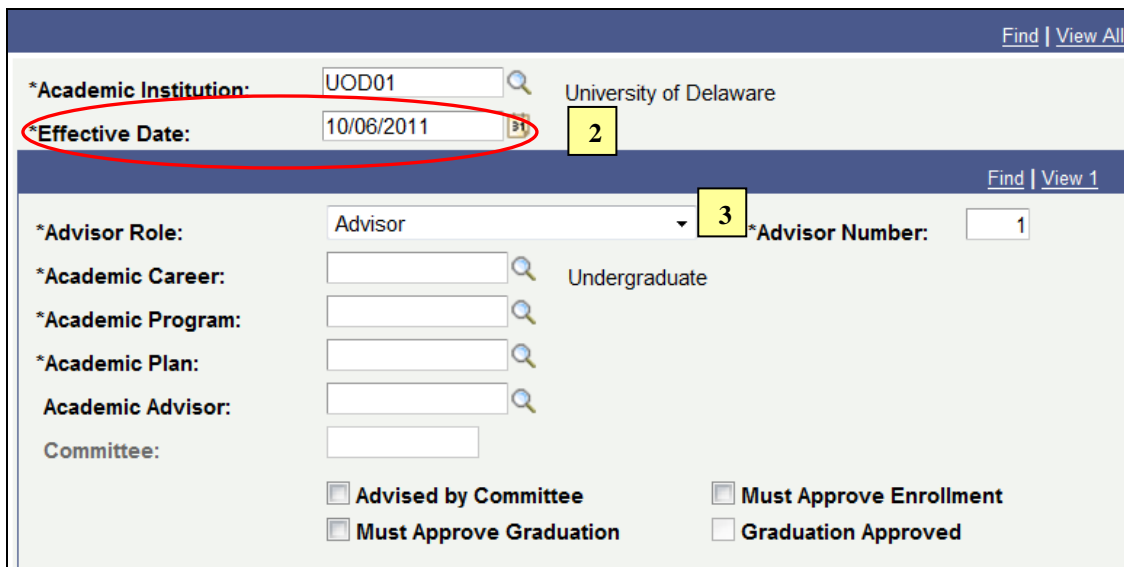
National ID: begins with

Last Name: begins with

First Name: begins with

Include History Correct History Case Sensitive

1. Navigate to the Search Page and enter student's **UD ID** or name and click the **Search** button.



The screenshot shows the UDSIS search interface. At the top, there are fields for '*Academic Institution:' (UOD01) and '*Effective Date:' (10/06/2011). The 'Effective Date' field is circled in red and has a yellow box labeled '2' next to it. Below this, there is a section for '*Advisor Role:' (Advisor) and '*Advisor Number:' (1). The 'Advisor Role' dropdown is highlighted with a yellow box labeled '3'. Other fields include '*Academic Career:' (Undergraduate), '*Academic Program:', '*Academic Plan:', 'Academic Advisor:', and 'Committee:'. At the bottom, there are four checkboxes: 'Advised by Committee', 'Must Approve Enrollment', 'Must Approve Graduation', and 'Graduation Approved'.

2. The Academic Advisor is stored within UDSIS with an **Effective Date**. This allows UDSIS to store historical information about advisors. **The most recent date is the current Advisor**. See page 8 for information about including historical advisors.

Effective Date – accept current date only if the rest of the information is blank and it is a new student who has never been assigned an advisor.

If you are adding an advisor to a student who already has information on this page, see page 6: changing an advisor or adding an additional advisor. Contact the Registrar's Office if you have any other questions before proceeding.

3. **Advisor Role** – accept default of Advisor (Other choices apply to graduate program options.) If the student already has an advisor currently, follow the Adding New Advisors Directions on Page 5 on Changing Advisors.

Do this only if you have verified that the student is currently enrolled in your department.

*Academic Institution: UOD01 University of Delaware
*Effective Date: 10/06/2011

*Advisor Role: Advisor *Advisor Number: 1

*Academic Career: Undergraduate
*Academic Program:
*Academic Plan:
Academic Advisor: 5
Committee:

Advised by Committee Must Approve Enrollment
 Must Approve Graduation Graduation Approved

- Academic Career, Program and Plan** – use Lookup icons to fill-in these values. Note: The system will only give you the values for which the student is currently active. If your department is NOT a choice, do not proceed. Contact the Registrar's Office or wait a few days till the change of major occurs.
- Academic Advisor** – enter Empl ID (UD ID) or use lookup to select the advisor
For best results, enter information in more than one of these boxes:
Academic Organization (department),
Last Name
First Name.
If the advisor doesn't appear in search, contact the Registrar's office.

Advisor Search Page

Look Up Academic Advisor

Academic Institution: begins with UOD01
EmplID: begins with
Academic Organization: begins with
National ID: begins with
Campus ID: begins with
Last Name: begins with
First Name: begins with

Lookup Clear Cancel

After entering and advisor, the screen looks like:

Student Advisor

Student Name **Student ID**

Find | View All First 1 of 1 Last

*Academic Institution: UOD01 University of Delaware

*Effective Date: 02/23/2011

*Advisor Role: Advisor *Advisor Number: 1

*Academic Career: UGRD Undergraduate

*Academic Program: AS-A Arts and Sciences - Associates

*Academic Plan: UST-AA University Studies AA

Academic Advisor: 99999 **Advisor Name**

Committee:

Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved

6 Save Return to Search Notify Update/Display Include History Correct History

6. Click any checkboxes in the Advisor screen that apply and then click the **Save** Button.

Changing Advisors

Prior to changing any advisors read the Important Note on Page 1 before proceeding.

1. Navigate to the Search Page:

Records and Enrollment > Student Background Information > Student Advisor

and enter student's UD ID or name and click the Search button.

Student Advisor

Student Name _____ **Student ID** _____

Find | View All First 1 of 1 Last

*Academic Institution: UOD01 University of Delaware + - 2

*Effective Date: 02/23/2011

Find | View All First 1 of 1 Last

*Advisor Role: Advisor *Advisor Number: 1 + - 3

*Academic Career: UGRD Undergraduate

*Academic Program: AS-A Arts and Sciences - Associates

*Academic Plan: UST-AA University Studies AA

Academic Advisor: 99999 **Advisor Name**

Committee: _____

Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved

Save Return to Search Notify Update/Display Include History Correct History

2. Click the top + to add or create a new record with a new Effective Date. Changes can only be made in the new effective date. All data prior to that date is stored as history.
3. Click on bottom + button to add a new Advisor record (row) or overwrite the current advisor information if it is no longer applicable. Click on **View All** to see all the current advisors for the student) Review the instructions for entering an advisor starting on page 2.

Note: Remember that a student with a double major or several minors may have several advisors. You can only delete the one that no longer applies in the new date. If replacing an old advisor, overwrite the data in the new effective date row. If you are adding an advisor to a currently existing advisor, check the + in new effective date.

Student Advisor

Student Name _____ **Student ID** 17 70000001

Find | View All First 1 of 2 Last

*Academic Institution: UOD01 University of Delaware + -

*Effective Date: 09/01/2006

Find | View All First 1 of 1 Last

*Advisor Role: Advisor *Advisor Number: 1 + -

*Academic Career: UGRD Undergraduate

*Academic Program: CE 5 Prof Cont Studies Credit

Academic Plan: CE-ND No Major

Academic Advisor: 20855 Parnell, Michelle Lynn

Committee: 6 88888 Robinson, Robbie

Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved

Change the Academic Career and Program to the new program and career into which you are adding the new advisor – either enter Empl ID, or use lookup to select the advisor (shown on page 3).
Add the new advisor.

Note: Make sure you have the correct choices for the current program and plan for the student. If you change an advisor without the correct program/plan, that advisor will not have access to that student record since, regardless of what name you put in, advisors only have access to students in their department.

Student Advisor

Student Name 70000001

Find | View All First 1 of 2 Last

*Academic Institution: UOD01 University of Delaware

*Effective Date: 09/01/2006

Find | View All First 1 of 1 Last

*Advisor Role: Advisor *Advisor Number: 1

*Academic Career: UGRD Undergraduate

*Academic Program: CE Prof Cont Studies Credit

Academic Plan: CE-ND No Major

Academic Advisor: 88888 Robinson, Robbie

Committee:

Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved

8 Save Return to Search Notify Update/Display Include History

Adding Additional Advisors

7. Add a second or third advisor if needed using the lower button

An additional advisor may be needed if you want to designate a different person to approve graduation or enrollment by using the check boxes.

8. Click the **Save** button.

Include History and Return to Search buttons

Student Advisor

Student Name 70000001

Academic Institution: UOD01 University of Delaware

Effective Date: 09/01/2006

Advisor Role: Advisor **Advisor Number:** 1

Academic Career: UGRD Undergraduate

Academic Program: CE Prof Cont Studies Credit

Academic Plan: CE-ND No Major

Academic Advisor: 88888 Robinson, Robbie

Committee:

Adv _____ tee _____ t

Must Approve Graduation Graduation Approve

Buttons: Save, Return to Search, Notify, Update/Display, **Include History**, Correct History

1. **Include History button** – UDSIS will only show you the current record, if you want to see *historical* rows you must click this button
 - Click **View All** to see both rows at the same time
2. **Return to Search button** – **click this button to find another student's record**

Viewing Advisors in UDSIS

1. Students will view their advisors in their Student Center, in the Advisor blue box in the right column.
2. Administrative Users will view a student's advisor in Student Services Center, in the Advisor blue box in the right column.