

Editing Advisor Assignments in PeopleSoft

Rochester Institute of Technology

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Overview

All students will be assigned advisors through a university-defined process. Once a student is assigned to an advisor, the student will be reflected in the advisors list of advisees. Likewise, the student will be able to view all advisors assigned to them on the Student Center page in the new Student Information System. With one click, students will have access to the names, contact information, and roles of their advisors.

Who are Advisors?

The implementation of a new Student Information System allows for a broader definition of the term “advisor” to be employed by RIT. In the past, no student could be assigned more than 3 advisors, thus restricting the use of the advisor positions to primarily the academic departments. Moving forward this will no longer be the case. Students may have multiple advisors and their roles may be widespread across the University.

Several types of advisors assist students and they have been placed into two categories – academic and support. “**Academic**” advisors are primarily associated with the academic department of the student. “**Support**” advisors are individuals that support the student, usually in a formal role, but are not directly affiliated with the primary academic department.

Advisor/Committee Roles

Academic Advisors

Primary Academic Advisor – the student’s professional academic advisor from their academic college/program. This individual should be the student’s primary point of contact.

CRP Advisor – for the period of time that the student is participating in the College Restoration Program (CRP), the CRP Advisor will replace the academic advisor and become the student’s primary point of contact.

English Language Center Advisor – while a student is a participant in the English Language Center (ELC) they will be assigned an ELC Advisor. This advisor may be the only advisor the student is assigned or it may be in addition to an Academic Advisor. Whenever advisors are co-assigned, the ELC advisor and the Academic Advisor will work in concert to provide assistance to the student.

Faculty Advisor – the student’s faculty advisor is a member of the student’s academic department who is able to guide students with subject matter inquiries, technical information, graduate school processes, and employment opportunities/decisions.

Honors Program Advocate – the advocate is a representative from a student’s college/program who advises the student on their honors program requirements.

NTID Counselor/Advisor - The NTID faculty or staff member who provides personal counseling and academic advising to the associate degree NTID students or who provides personal and career counseling for NTID-supported bachelor degree students in one of the other colleges of RIT.

NTID Support Coordinator - The NTID faculty or staff member who provides academic advising for the NTID-supported bachelor’s degree students.

Support Advisors

HEOP Counselor – participants in the Arthur O. Eve Higher Education Opportunity Program will each have a professional staff member from the HEOP program assigned to them as an advisor. HEOP is a New York State and RIT-funded program committed to the recruitment and academic success of students who would otherwise be excluded from higher education due to academic and economic disadvantage. HEOP provides academic support, financial assistance, and advocacy for eligible students.

CES Coach – the CES Coach is a professional team member of the Center for Engagement and Student Success. Coaches provide personal, academic, and leadership advising to students affiliated with the Center

NCAA Compliance Officer – student athletes have a NCAA Compliance Officer listed as an advisor. The NCAA Compliance Officer has the responsibility of making sure that both the student and the university are in compliance with the Conference and NCAA rules and regulations.

ROTC Commanding Officer – this advisor role will be assigned to those students who are in either the Army or Air Force ROTC program. *Students who are in Navy ROTC will not have a commanding officer listed, as those officers are located at the University of Rochester.*

SA Specialist – the SA specialist is a member of the Spectrum Support Program at RIT. Students receiving support through SSP will have a coach assigned to further assist and support them.

How are Advisors assigned?

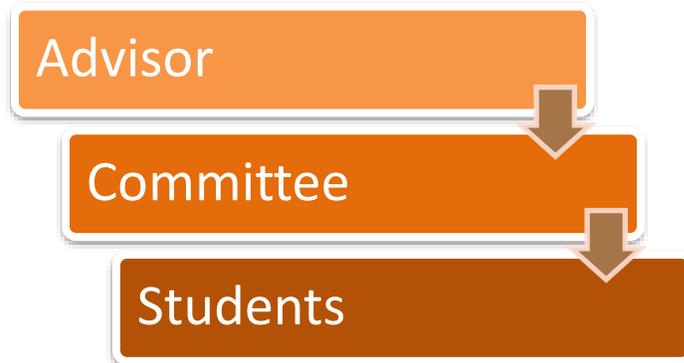
Students are assigned advising “committees” rather than by the advisor’s UID. Each committee consists of one member, who is the advisor. The name of this committee matches the name of the advisor. This method of assignment allows for the role of each advisor to display for the students.

Committees also allow for a list of advisees to be easily transferred from one advisor to another. When an advisor leaves their role temporarily or permanently, the committee may be renamed and membership adjusted. With the adjustment, all students assigned to this committee will now see the new advisor without administration having to edit every student’s list of advisors. Additionally, this change will alter the advisor’s advisee list in Advisor Center to reflect the students assigned to them.

During RIT’s conversion to PeopleSoft, all advisors previously assigned to students in STARS/SIS were carried into PeopleSoft. However, these advisors were not assigned as committees to these students. As a result, over time, departments will work to convert these students from advisors to committees. Later this year, the Institute Advising office will distribute a report to the colleges that lists all active students assigned advisors by UID rather than committees.

Advisors can access a full list of students assigned to them as advisees in the Advisor Center. The list will include all students, regardless of how they were assigned (committee or advisor UID). Students who show as “Need Update” were assigned by UID and should be corrected.

Advisors are assigned at the program (college) level. Because of the increased flexibility that PeopleSoft provides and the various ways that advisors can be assigned to a student, the university has developed a standard naming and assignment convention for advisors, based on their role(s) with students.



Committees

All committees will be created and managed in the University Advising Office. Each committee will be named with a standard naming convention as outlined below.

Committee ID Prefixes in Colleges

CST###	College of Engineering Technology
HST###	College of Health Sciences and Technology
CIS###	B. Thomas Golisano College of Computing and Information Sciences
CLA###	College of Liberal Arts
COE###	Kate Gleason College of Engineering
COS###	College of Science
CRP###	College Restoration Program
ELC###	English Language Center
GIS###	Golisano Institute of Sustainability
GLO###	Global Campus Primary Academic Advisor
IAS###	College of Art and Design
SCB###	Saunders College of Business
TID###	National Technical Institute for the Deaf
INT###	School of Individualized Study, College Restoration Program

Academic Advisor Committee IDs are followed by numbers 001-099, Faculty Advisor Committee IDs are followed by numbers 100 and up (i.e. Academic Advisor: CST001, SCB003. Faculty Advisor: CST101, CST227).

Support Advisors

CSTP##	Collegiate Science and Technology Entry Program
HEOP##	Higher Education Opportunity Program
HON###	Honors Program Advocate
MCAS##	Center for Engagement and Student Success
NCAA##	National Collegiate Athletic Association
ROTC##	Reserve Officers' Training Corps
SLSA##	Spectrum Support Program
VETS##	Office of Veteran Student Success

Committee Management

The University Advising Office will manage any changes required for advising committees. If advising staff are added or subtracted from your area, you will need to work through the Dean's Delegates (or Advising lead) in your area to request these changes.

To submit request for additions, corrections, or replacements, the Dean's Delegate or Advising Lead will submit the Advisor Assignment webform.

<http://www.rit.edu/advising>

Contact Us > Advisor Assignment (RIT Authentication Required)

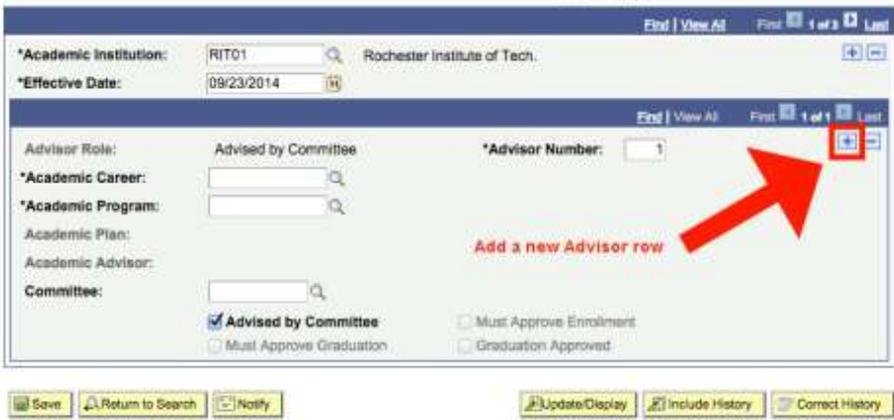
Once the form has been received, changes to committees will occur within five business days.

The Importance of Effective Dates

The Advisor assignment process is dependent on effective dates. As a result, it is important to use the correct effective dates. A powerful new feature that comes with the use of the PeopleSoft product is the ability to track history, including changes. With that said, any time a change is made to a student's advisors – additions or deletions – a new effective dated row is added. The date that is used to make the change will be the date that the students and the advisors can see the changes in their respective center in SIS (ex; Student Center, Advisor Center). If a student changes program, Advisor assignment occurs after the student is officially in their new program in SIS.

Assigning a New Advisor (First-Time)

Use this process when assigning advisors to a student who has never been assigned an RIT advisor before.

1	Navigate to Records and Enrollment / Student Background Information / Student Advisor
2	Enter student UID and click 'Search'
3	Select the appropriate Academic Career from the lookup tool (🔍)
4	Select the appropriate Academic Program from the lookup tool (🔍)
5	Select the appropriate Committee from the lookup tool (🔍)
6	<p>For additional advisors, click the (+) in the Advisor row and follow steps 3 – 5</p> <p>Student Advisor</p> 
7	When finished, click 'Save'

Assigning an Additional Advisor to a Student

When an advisor has previously been assigned, but another advisor is needed, remember an effective dated row must be added in order to keep a history of the advisors assigned to the student.

1	Navigate to Records and Enrollment / Student Background Information / Student Advisor
2	Enter student UID and click 'Search'
3	<p>Click the (+) next to the Effective Date row</p> <p>Student Advisor</p>  <p>The screenshot shows the 'Student Advisor' form with the following fields: *Academic Institution: RIT01 Rochester Institute of Tech., *Effective Date: 09/23/2014, Advisor Role: Advised by Committee, *Advisor Number: 1, *Academic Career: (empty), *Academic Program: (empty), Academic Plan: (empty), Academic Advisor: (empty), Committee: (empty). There are checkboxes for 'Advised by Committee' (checked), 'Must Approve Enrollment', 'Must Approve Graduation', and 'Graduation Approved'. A red arrow points to the '+' button in the top right corner of the form, with the text 'Add a new Effective Date row' below it.</p>
4	Click "View All" in the Advisor row (second row below Effective Date)
5	All current assignments should carry over*
6	<p>Click the (+) in the Advisor row</p> <p>Student Advisor</p>  <p>The screenshot shows the 'Student Advisor' form with the same fields as above. A red arrow points to the '+' button in the top right corner of the form, with the text 'Add a new Advisor row' below it.</p>
7	Select the appropriate Academic Career from the lookup tool (🔍)
8	Select the appropriate Academic Program from the lookup tool (🔍)
9	Select the appropriate Committee from the lookup tool (🔍)
10	*IMPORTANT: You need to ensure that all previous assignments carry over before saving. If they do not carry over, you must add those assignments back into this new effective date row. Follow steps 7 – 9 for each advisor row.
11	When finished, click 'Save'

Assigning an Advisor (Change of Program)

A change of program occurs before the assignment is updated. Assigning a new advisor by committee will require a new effective dated row.

1	Navigate to Records and Enrollment / Student Background Information / Student Advisor
2	Enter student UID and click 'Search'
3	Click 'View All' on the Advisor row (second row below Effective Date)
4	Print this page for reference*
5	<p>Click the (+) next to the Effective Date row</p> <p>Student Advisor</p>  <p>The screenshot shows the 'Student Advisor' form. At the top, there are fields for '*Academic Institution:' (RITD1) and '*Effective Date:' (09/23/2014). A red arrow points to a '+' button in the top right corner of the form, next to the text 'Add a new Effective Date row'. Below these fields are sections for 'Advisor Role', '*Academic Career', '*Academic Program', 'Academic Plan', 'Academic Advisor', and 'Committee'. There are also checkboxes for 'Advised by Committee', 'Must Approve Enrollment', 'Must Approve Graduation', and 'Graduation Approved'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.</p>
6	Select the appropriate Academic Career from the lookup tool (🔍)
7	Select the appropriate Academic Program from the lookup tool (🔍)
8	Select the appropriate Committee from the lookup tool (🔍)
9	*IMPORTANT: Previous assignments will not carry over if the student is in a new Academic Program. Add previous assignments, with new Academic Program, into this new effective date row. Follow steps 6 – 8 for each advisor row.
10	When finished, click 'Save'

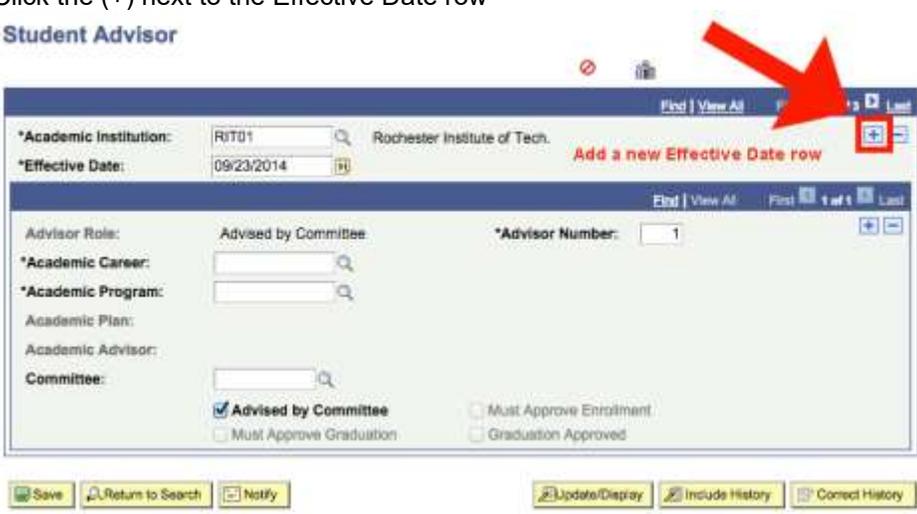
Updating an Advisor from UID to Committee

All students who were converted to PeopleSoft in April 2012 have advisors assigned to them as individual advisors rather than committees. These students will not be able to see the role of these advisors in their Student Center. To resolve these issues, departments are encouraged to change assignments from advisor to committee. This guide will show how to make this change for students admitted prior to Fall 2012-13

1	Navigate to Records and Enrollment / Student Background Information / Student Advisor
2	Enter student UID and click 'Search'
3	<p>Click the (+) next to the Effective Date row</p> <p>Student Advisor</p> 
4	Click 'View All' on the Advisor row
5	All current assignments should carry over*
6	Any previous assignment by Academic Advisor ID has been automatically removed and needs to be updated to a committee
7	Select the appropriate Committee from the lookup tool (🔍)
8	<p>*IMPORTANT: You need to ensure that all previous assignments carry over before saving. If they do not carry over, you must add those assignments back into this new effective date row.</p> <p>Follow these steps:</p> <ul style="list-style-type: none"> • Select the appropriate Academic Career from the lookup tool (🔍) • Select the appropriate Academic Program from the lookup tool (🔍) • Select the appropriate Committee from the lookup tool (🔍)
9	When finished, click 'Save'

Removing an Advisor Assignment

You may need to delete an advisor if a change has occurred on the student record, if a student no longer needs a support advisor, or if an error needs to be corrected. When deleting an advisor you still need to add a new effective date for the change to take place. To remove (delete) an advisor, simply click the  icon for that advisor row. It is important that you only remove advisors you are responsible for assigning. Academic and Faculty advisors will be removed by academic units. Support advisors will be removed by the support units.

1	Navigate to Records and Enrollment / Student Background Information / Student Advisor
2	Enter student UID and click 'Search'
3	<p>Click the (+) next to the Effective Date row</p> <p>Student Advisor</p> 
4	Click "View All" in the Advisor row (second row below Effective Date)
5	All current assignments should carry over*
6	Click the (-) in the Advisor row you wish to remove
7	<p>*IMPORTANT: You need to ensure that any remaining assignments, that you are not deleting, carry over before saving. If they do not carry over, you must add those assignments back into this new effective date row.</p> <p>Follow these steps:</p> <ul style="list-style-type: none"> • Select the appropriate Academic Career from the lookup tool (🔍) • Select the appropriate Academic Program from the lookup tool (🔍) • Select the appropriate Committee from the lookup tool (🔍)
8	When finished, click 'Save'