

# ASSIGNING ADVISORS TO A STUDENT

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## REVISION HISTORY

Version	Date	Name	Description

## INTRODUCTION AND PURPOSE

The purpose of this document is to explain how advisors are assigned to and removed from student records. The form 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 Student Affairs Information Systems. 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, open Banner Training ([bannersbx.ucr.edu](http://bannersbx.ucr.edu)) to follow along.

## FORMS

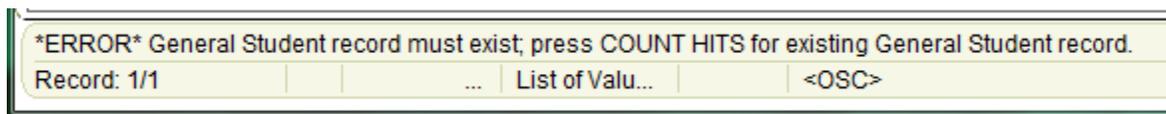
The forms listed below are covered in this training.

Form	Form Name	Description

## PROCEDURES

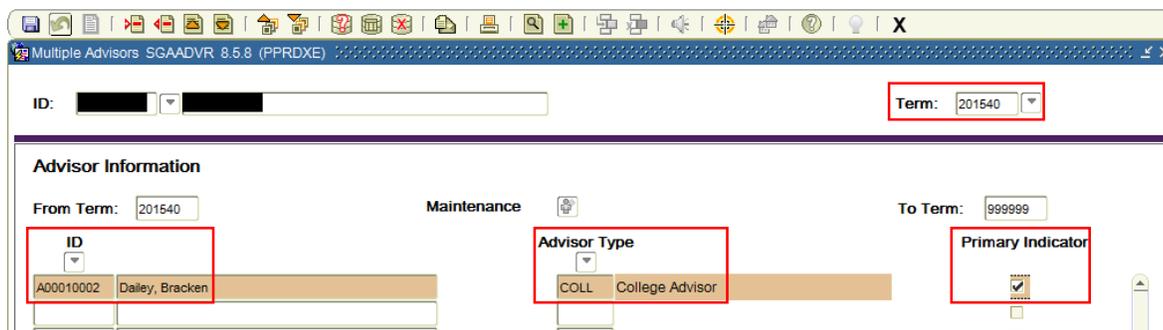
### ASSIGNING AN ADVISOR

**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.



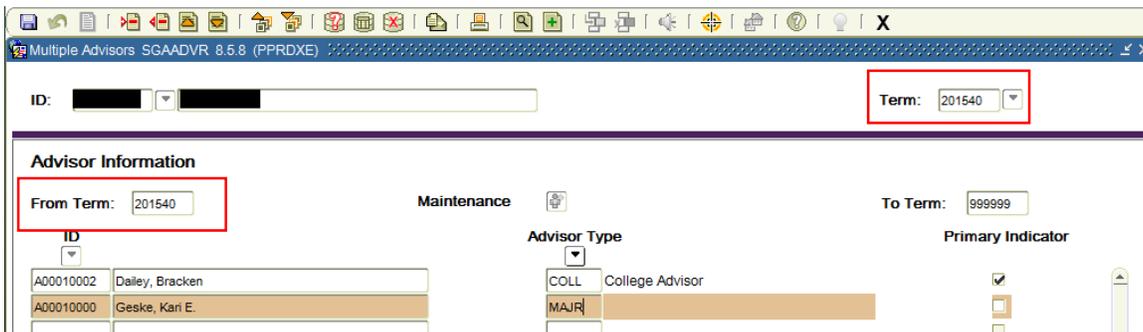
### HOW TO ASSIGN AN ADVISOR WHEN NO EXISTING ADVISORS ARE LISTED

1. Go to **SGAADVR**.
2. Enter the **SID**.
3. Enter the **effective term** the student is being assigned to the advisor, next block.
  - a. Note: The term you enter in the key block 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 are no other Advisors listed, proceed.
5. 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.
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.
8. **Save**.

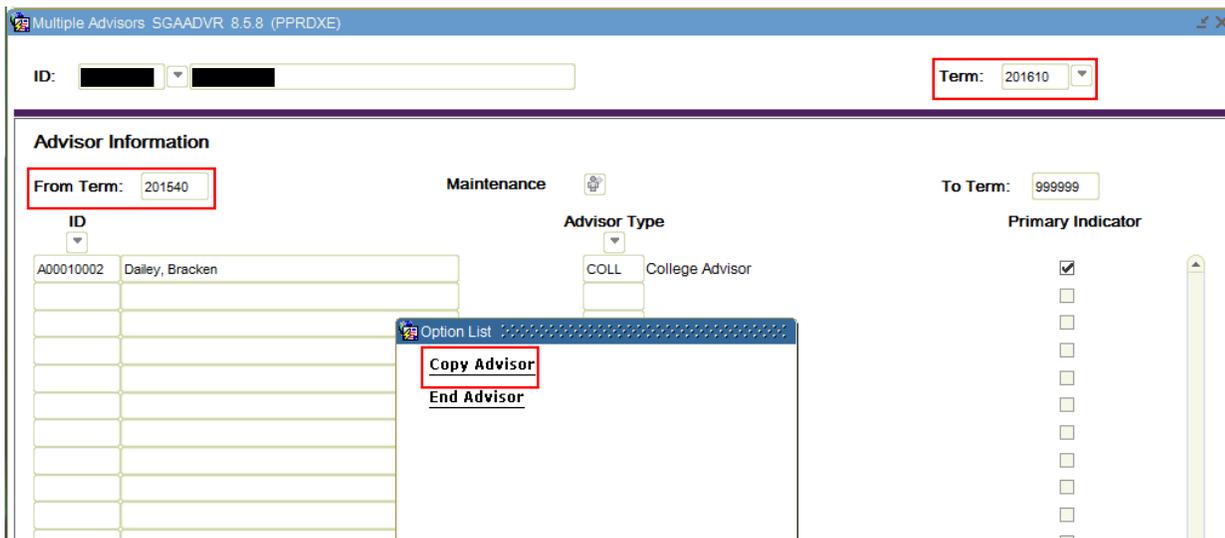


**HOW TO ASSIGN AN ADVISOR WHEN EXISTING ADVISORS ARE LISTED**

1. Go to **SGAADVR**.
2. Enter **SID**.
3. Enter **effective term** the advisor is being assigned to the student, next block.
  - a. Note: The term you enter in the key block 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 SGAADVR records that have different term ranges. Proceed with these instructions through step 9; then rollback and enter the term in the key block 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, arrow down to an empty row. 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 7.



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).



7. Go to an empty row 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 in the Key Block 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 spring 2016, 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 in the key block 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 in the key block.
4. **Next Block**.

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

7. Banner will automatically place the term you entered in the key block into the To Term field and save for you. Exit the form.

#### HOW TO REMOVE AN ADVISOR WHEN 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 summer 2016, 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 in the key block 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 201640, then enter 201710 in the key block.

4. **Next Block.**

Multiple Advisors SGAADVR 8.5.8 (PPRDXE)

ID: [Redacted] Term: 201630

**Advisor Information**

From Term: 201620 Maintenance [Maintenance Icon] To Term: 999999

ID	Advisor Name	Advisor Type	Primary Indicator
A00010002	Dailey, Bracken	COLL College Advisor	<input checked="" type="checkbox"/>
A00010000	Geske, Kari E.	MAJR Major Advisor	<input type="checkbox"/>

5. If there are at least two advisors on the record, proceed.
6. 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.

Option List

Copy Advisor

End Advisor

Cancel

7. Highlight the Advisor that you are removing.
8. From the **Record Menu**, select the **Remove option**.
9. Ensure there is one advisor marked **primary** which is indicated by the check box.
10. **Save.**

Multiple Advisors SGAADVR 8.5.8 (PPRDXE)

ID: [Redacted] Term: 201630

**Advisor Information**

From Term: 201630 Maintenance [Maintenance Icon] To Term: 999999

ID	Advisor Name	Advisor Type	Primary Indicator
A00010002	Dailey, Bracken	COLL College Advisor	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

## 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 - KEY BLOCK 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 in the key block should be *equal to* the From Term (which you can see and confirm when you perform a next block function).
4. **Next block**.

Multiple Advisors: SGAADVR 8.6.8 (PPRDxE)

ID: [Redacted] [Redacted]

Term: 201730

**Advisor Information**

From Term: 201730

Maintenance [Icon]

To Term: 999999

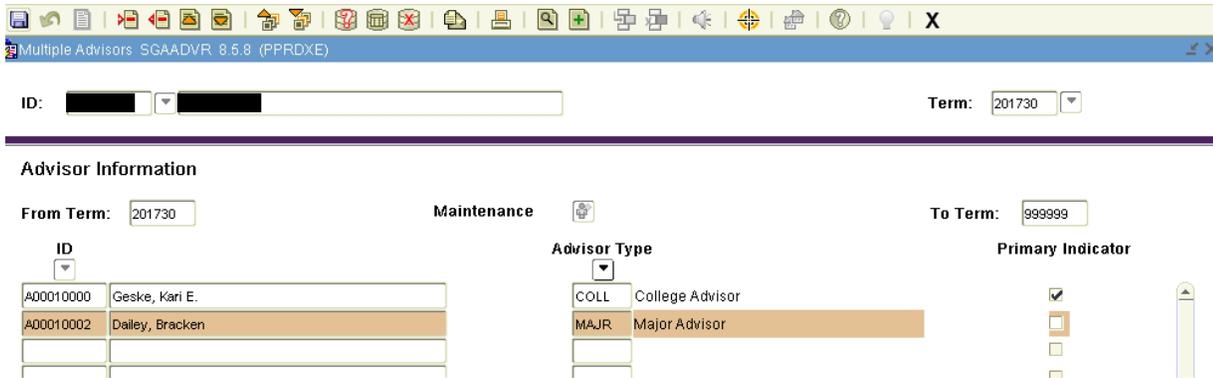
ID [Dropdown]

Advisor Type [Dropdown]

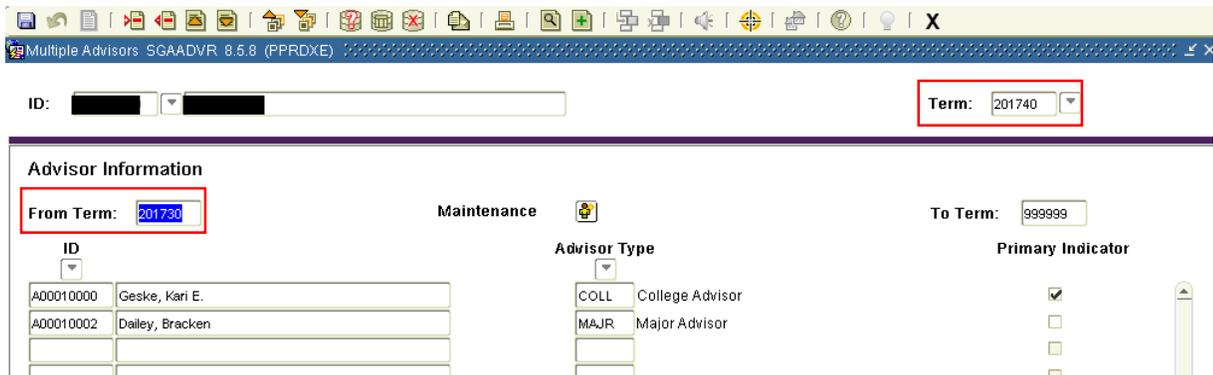
Primary Indicator [Checked]

A00010000 Geske, Kari E. COLL College Advisor

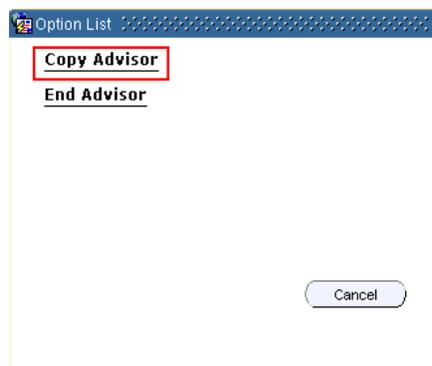
5. You should see the advisor that the student is being removed from. There may be other advisors on the student's record.
6. Navigate to a new row. Add the **new advisor code**. Ensure that the correct name appears. If you are unsure of the ID number, use the button to query for the advisor by name.
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. **Save.**
10. **Rollback** to the key block.
11. Enter the term code in the key block that chronologically *follows* the term code you entered in step 3. For example, if the term entered in step 3 was 201730, the term to enter in this step is 201740. Next Block.



12. 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.



13. Highlight the advisor that you are removing from the student's record.
14. From the **Record Menu**, select the **Remove** option.
15. **Save.**

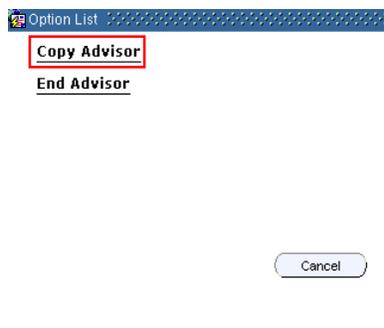


**HOW TO ADD AN ADVISOR AND REMOVE AN EXISTING ADVISOR AT THE SAME TIME - KEY BLOCK TERM IS NOT EQUAL TO FROM TERM**

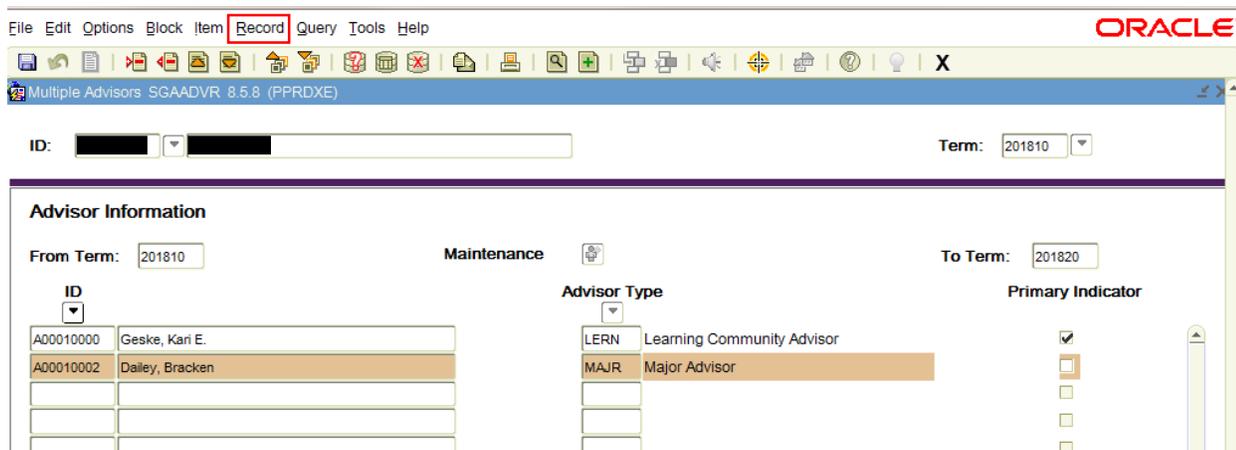
1. Go to **SGAADVR**.
2. Enter **SID**, tab.
3. Enter the **term** the advisor is to be removed from the student’s record.
  - a. In this case because the student is being removed in a term later than the term the advisor was assigned to the student, the term you enter in the key block should be *after*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



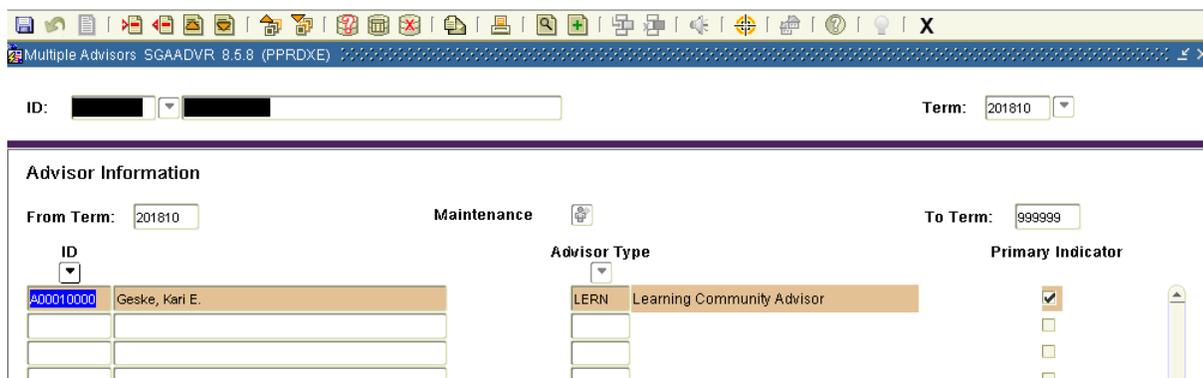
5. You should see the advisor that is being removed from the student’s record. There may be other advisors on the student’s record.
6. Select the **maintenance button**. A pop-up window presents 2 options: Copy Advisor or End Advisor. **Choose Copy Advisor** to continue the other attribute(s) on the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



7. Navigate to an empty row and 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.
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. Navigate to the advisor that you are removing.
11. With the advisor highlighted that you are removing from the student's record, go to the **Record** menu, select the **Remove** option.



12. **Save.**



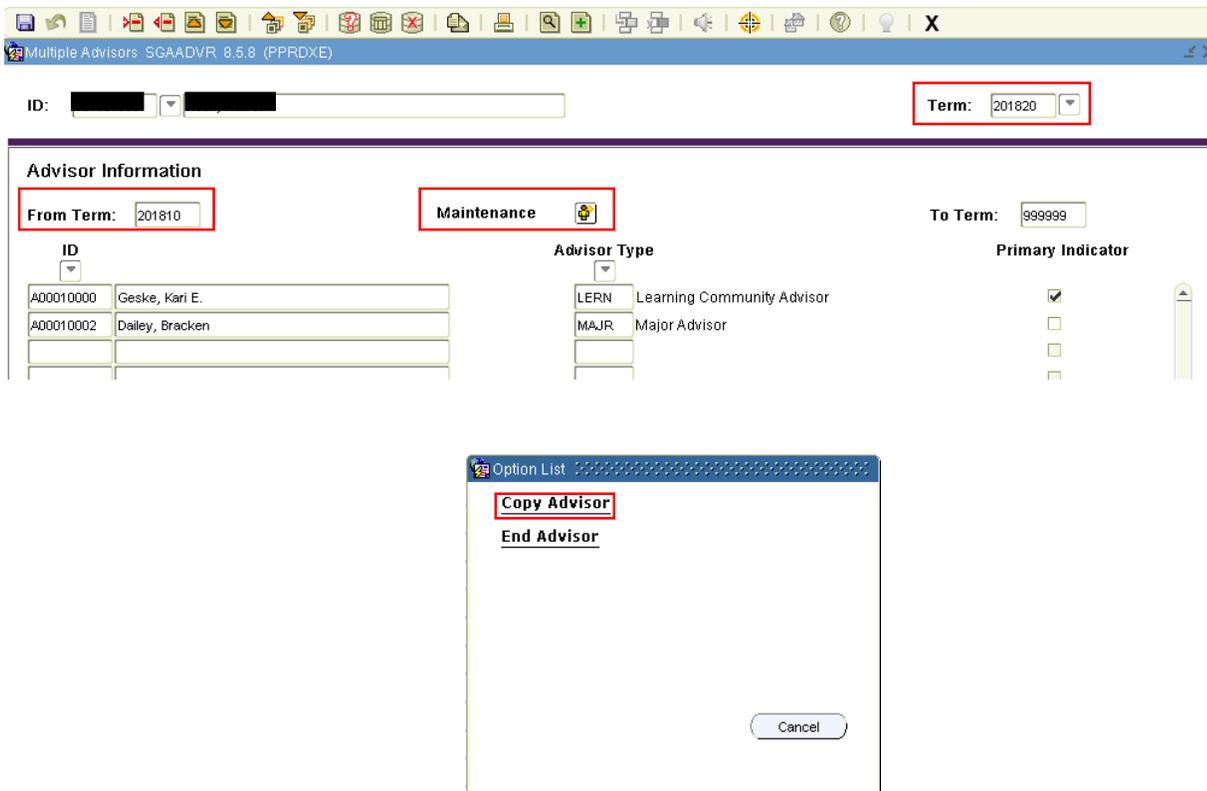
### CHECK YOUR UNDERSTANDING

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. Next block.
4. If the term you entered in the key block 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 in the key block is later than the From Term, click the **Maintenance button**. Two options will appear: Copy Advisor or End Advisor. Choose **Copy Advisor**.



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**.

Multiple Advisors SGAADVR 8.5.8 (PPRDxE)

ID: [ ] [ ] Term: 201820

**Advisor Information**

From Term: 201820 Maintenance To Term: 999999

ID	Advisor Name	Advisor Type	Primary Indicator
A00010000	Geske, Kari E.	COLL College Advisor	<input type="checkbox"/>
A00010002	Dailey, Bracken	FACU Faculty Advisor	<input checked="" type="checkbox"/>

**CHECK YOUR UNDERSTANDING**

1. If your term in the Key Block 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 form.
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