Overview

This procedure will show you how to assign an advisor to a student.

Steps

Assigning an Advisor

1. Navigate to: Records and Enrollment > Student Background Information > Student Advisor.
2. Enter the student’s ID or Last Name and First Name.
3. Click Search.
4. If the student already has an advisor assigned at this institution, additional advisors may be assigned by clicking immediately to the right of the Advisor Number field and then continue to step 6.
5. Enter Academic Institution.

**NOTE:** If a student already has an advisor assigned at a different Institution, click to the right of Institution and enter that institution and the associated advisors.
Assigning an Advisor to a Student

6. In the Advisor Role field, select the appropriate value from the drop-down menu.
   - Nine values are possible: Academic Advisor, Advising Office, Athletic Advisor, Faculty Advisor, Faculty Mentor, Honors Advisor, Success Coach, Qualifying Exam Committee, and Thesis Committee.

The system automatically populates the Advisor Number.

7. Enter the student’s Academic Career.
   - A career that does not apply to the student cannot be entered. For example, UGRD (Undergraduate) cannot be entered for a GRAD (Graduate) student.
   - You must enter a Career level for any advisor assignment.
   - You should assign advisors at only at the CAREER level – with no programs or plans – if the advisor is assigned to students across multiple programs (schools) and/or plans (majors).
   - EXAMPLES: advisor is assigned to students in campus-wide honors or athletics.

   **NOTE:** People in the Academic Advisor and Faculty Advisor roles cannot be assigned only at the Career level. Advisors in other roles, such as Athletics Advisor may be assigned at the Career level.

8. Enter the student’s Academic Program.
   - A Program that does not apply to the student cannot be entered.
   - It is possible that a student may have more than one Program.
   - You should assign advisors only at the CAREER AND PROGRAM levels (with no plans) if the advisor is assigned to students in multiple plans (majors) within one program (school).
   - EXAMPLE: advisor is assigned to students in all majors within the Business School.

   **NOTE:** Advising Office, Athletic Advisor, Faculty Mentor, Honors Advisor, and Success Coach are not Program specific and must not have a Program assigned. These advisor roles will go with the student even if they change Programs.

9. (Optional) Enter the Academic Plan.
   - A Plan that does not apply to the student cannot be entered.
   - It is possible that the student might have more than one plan.
   - You should assign advisors at the CAREER, PROGRAM, and PLAN levels if the advisor is assigned to students by plan (major).
   - EXAMPLE: advisor is assigned to Chemistry majors.

   For Advisor Active Date value, note that it is set to the current date by default and may not be modified. It represents the date the advisor is being assigned to the student.

10. Make sure the Advisor Status is set to Active.

11. In the Academic Advisor field enter the advisor’s ID or click to search for it.

The Must Approve Graduation, Must Approve Enrollment, Graduation Approved, Allow Planner Submissions, and Opt out auto inactivation checkboxes are optional and may be left blank if desired.
Assigning an Advisor to a Student

- The **Graduation Approved** checkbox is disabled unless the **Must Approve Graduation** checkbox is selected first. If the assigned advisor or committee must approve the student’s graduation, this field should contain a **Y**, otherwise it should contain an **N**.

- The **Must Approve Enrollment** checkbox should be “on” if workflow documents such as eDrop and eAdd requests should be routed to the specific advisor(s) rather than a workgroup. Schools may use Assign Advisor without eForms impact by entering **N** for the batch process and/or by leaving this field blank in the manual process. The value **N** will result in eForms bypassing the assigned advisor and instead being routed to eForms workgroups defined by the schools.

- The **Allow Planner Submissions** checkbox is blank by default. If selected, the advisor is stating that they will accept the Planner and associated comments from this advisee for review.

- Selecting the **Opt-Out auto inactivation** checkbox will opt this assignment out of the automatic inactivation of advisor and advising office assignments that normally occurs in the following instances:
  
  - The program/plan stack is Completed (student has graduated)
  - The program/plan stack is Cancelled (student never arrived on campus)
  - The program/plan stack is Discontinued (student has not been enrolled for 3 consecutive fall/spring terms)
  - The student is no longer active in a program for which an advisor was assigned to the student – and the student was assigned only at the program level
  - The student is no longer active in a plan for which an advisor was assigned to the student – and the student was assigned at the plan level
  - EXCEPTIONS: University Division (IUB) and University College (IUPUI) – if the student changes pre-majors but stays within UD or UC, the advisor assignment will not be inactivated
  - The student is Deceased

For information on the **Committee** field and the **Advised by Committee** checkbox, see the **Committees** job aids section.

12. (Optional) If the student has multiple advisors, additional advisors may be assigned by clicking immediately to the right of the **Advisor Number** field.
   
   - A new row will be added. Repeat steps 5 through 11 above for each new row added.

13. Click **Save**.

The advisor is now assigned to the student and the student is able to see who his/her advisor is via the **Student Center** which can be accessed in One.IU (one.iu.edu).

14. In One.IU, the student can search on “**Student Center**”, then click on the **Student Center** task.

15. Once in **Student Center**, the student clicks on **My Academics & Grades** link.

16. Under the **Advising** heading, the student clicks the **View My Advisors** link.
Academic Advising
Assigning an Advisor to a Student

My Academics
* For information on when current term grades will be available on your official transcript, visit your campus Registrar’s website.

- Advising
  - View My Advisors
- Academic Requirements
  - View My Advisement Report