

Adding or Updating an Academic Advisor

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

Search for the student by ID number or name

In order to add an advisor to a **brand new student**:

When you access the Student Advisor panel for a brand-new student, the screen will already display today's date, with the remaining parts of the screen blank. Fill in the career, program, plan, and advisor fields and save.

To change an **existing advisor**:

Click the blue "plus sign" in the top right hand corner of the top box (arrow shown below) - this will add a new row with the "effective date" field set to today's date.

Use the magnifying glass to look up the employee ID number of the new advisor

To add a **second advisor**:

Click the blue "plus sign" in the top right hand corner of the top box - this will add a new row with the "effective date" field set to today's date.

Click the second blue "plus sign" in the upper right hand corner of the lower box. This will add a second row to your current record. You will then need to fill in all fields (career, program, plan) in addition to assigning the advisor. The magnifying glass can be used to search on any field.

Student Advisor

The screenshot shows the 'Student Advisor' form. At the top, a red box highlights the text 'Student information redacted for FERPA compliance'. Below this, the form is divided into two sections. The top section contains fields for '*Academic Institution:' (CLKSN, Clarkson University) and '*Effective Date:' (07/01/2016). A red box highlights the '*Effective Date:' field. The bottom section contains fields for '*Advisor Role:' (Advisor), '*Advisor Number:' (1), '*Academic Career:' (UGRD, Undergraduate), '*Academic Program:' (SCI, Undergraduate A&S Science), 'Academic Plan:' (CS-BS, Computer Science BS), 'Academic Advisor:' (0005968, Tamon,Christino), 'Advisor Percentage:', and 'Committee:'. There are also four checkboxes: 'Advised by Committee', 'Must Approve Enrollment', 'Must Approve Graduation', and 'Graduation Approved'. A red arrow points to the blue plus sign in the top right corner of the top section. At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

Video instructions: <https://echo360.org/media/7fc55308-8ca5-4deb-9b9c-90460194dbf9/public>