

# Managing Advisor Assignments Table of Contents

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**Notes:**

## Advisor Assignments Overview

### Course Materials Overview

This manual covers the following regarding student advisor assignments:

- Add
- Change
- Delete
- Campus Procedures and Policy
- Reports

**Tip:** See potential automated processes here: <https://registrar.wisc.edu/advisors/>

### What is the Difference between an Academic Advisor and an Auxiliary Advisor?

We have two categories of advisors assigned to a student:

Advisor Type	Description														
<b>Academic Advisors</b>	<p>Academic advisors are advisors who are assigned to a student because of the student’s academic program. These advisors are identified with an advisor role of ‘<b>Academic</b>’.</p> <p><b>Every undergraduate and graduate student must be assigned ONE ‘Academic’ advisor or committee.</b></p> <p>The responsibility for maintaining correct academic advisor assignments is shared between the academic department, the Registrar’s Office, and the School/College Academic Student Affairs Office.</p>														
<b>Auxiliary Advisors</b>	<p>Auxiliary advisors are defined as advisors assigned to students because the advisor works with the student in a program, such as:</p> <table border="1"> <tbody> <tr> <td>• Athletics</td> <td>• PEOPLE</td> </tr> <tr> <td>• Career Advisor</td> <td>• POSSE</td> </tr> <tr> <td>• Center for Academic Excellence</td> <td>• Pre-Business</td> </tr> <tr> <td>• Center Educational Opportunity</td> <td>• Pre-Comm Arts</td> </tr> <tr> <td>• Faculty Advisor</td> <td>• Pre-Pharmacy</td> </tr> <tr> <td>• First Wave</td> <td>• Study Abroad</td> </tr> <tr> <td>• Graduate Coordinator</td> <td>• Veterans Benefits</td> </tr> </tbody> </table> <p><b>The responsibility for maintaining correct auxiliary advisor assignments rests with the program’s staff.</b></p>	• Athletics	• PEOPLE	• Career Advisor	• POSSE	• Center for Academic Excellence	• Pre-Business	• Center Educational Opportunity	• Pre-Comm Arts	• Faculty Advisor	• Pre-Pharmacy	• First Wave	• Study Abroad	• Graduate Coordinator	• Veterans Benefits
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• Graduate Coordinator	• Veterans Benefits														

## The Student Advisor Page

The Student Advisor page provides you the opportunity to [add](#), [change](#), and [delete](#) advisors.

### Student Advisor Page

Navigate to:

❑ **Student Records WorkCenter, Student Advisor**

-or- >Records and Enrollment >Student Background Information >Student Advisor

The screenshot shows the 'Student Advisor' page in a web application. At the top, there are tabs for 'Student Advisor' and 'Advisor Audit'. The main header displays 'Student, Stu' with ID: 0006069527 and Campus ID: 9926042988. Below this, there are search and navigation options: 'Find | View All' and 'First 1 of 1 Last'. The main form area is titled 'Student Academic Details' and contains several fields: '\*Academic Institution' (UWMSN), '\*Effective Date' (08/24/2020), '\*Advisor Role' (Academic), '\*Advisor Number' (2), '\*Academic Career' (UGRD), '\*Academic Program' (BS), 'Academic Plan' (BS 634), 'Academic Advisor' (0004308515), 'Advisor Percentage', and 'Committee'. A checkbox for 'Advised by Committee' is also present. At the bottom, there are 'Save' and 'Return to Search' buttons. Annotations include a box at the top stating 'When updating, if date is prior to today, change to today's date.' with an arrow pointing to the effective date field. Another box on the right states 'View & Add new Advisor rows here' with an arrow pointing to the '1 of 7' pagination control.

**Security Alert!** Update users have access to change any student's record!



When searching for a student, use *Campus ID* to ensure you are updating the correct student's record.

Use the [Advisor Audit](#) tab to what changes were made and who made them.

## Student Advisor Page Field Descriptions

The table below describes the fields found on the Student Advisor page:

Field	Description						
<i>Name</i>	Student's primary name.						
<i>ID</i>	SIS ID. This number is system-generated and <u>not</u> the same as the Campus ID.						
<i>Campus ID</i>	Student's 10-digit campus ID number.						
<i>Academic Institution</i>	Defaults to 'UWMSN', for UW–Madison.						
<i>Effective Date</i>	<p>Last date a change was made to a student's advisor assignment.</p> <ul style="list-style-type: none"> <li>• <i>Effective Date</i> defaults to the current date for a new record.</li> <li>• <i>Date</i> must be changed manually after the first save.</li> <li>• <i>Effective Date</i> can be past, present, or future.</li> <li>• <b>When updating or adding additional advisors, change <i>Effective Date</i> to today's date, but if this record is future dated, keep the date as is.</b></li> <li>• <b>You may need to future date to start of next term,</b> Term Begin and End Dates can be found here:  <input type="checkbox"/> Student Records WorkCenter,  Dean/Dept Processing , <b>Session Dates and Deadlines</b></li> </ul> <hr/> <p><b>Relationship to Program/Plan Page Effective Dates:</b></p> <p>In order for the student's Academic Program &amp; Plan data to be available in the magnifying glass Look up lists on the Student Advisor page, <b>the <i>Effective Date</i> on the Student Advisor page must be later than or equal to the <i>Effective Date</i> on the Program/Plan page.</b></p> <p>(See '<a href="#">Advisor Assignments – The Big Picture</a>')</p> <p>The following rules generally apply to how actions on the Program/Plan page are effective dated:</p> <table border="1"> <thead> <tr> <th>If student is a:</th> <th>Then the <i>Effective Date</i> on the Program/Plan page is usually set to:</th> </tr> </thead> <tbody> <tr> <td>Current Student</td> <td>The first day of the term in which the change was or is to be made.</td> </tr> <tr> <td>New UW–Madison Undergrad Student</td> <td>The date the student matriculated.</td> </tr> </tbody> </table>	If student is a:	Then the <i>Effective Date</i> on the Program/Plan page is usually set to:	Current Student	The first day of the term in which the change was or is to be made.	New UW–Madison Undergrad Student	The date the student matriculated.
If student is a:	Then the <i>Effective Date</i> on the Program/Plan page is usually set to:						
Current Student	The first day of the term in which the change was or is to be made.						
New UW–Madison Undergrad Student	The date the student matriculated.						

Field	Description
<p><b>Advisor Role</b></p>	<p>Type of advisor to this student. Defaults to ‘Academic’; Change if needed.</p> <p><b>Academic Advisor</b> Indicates the student’s ‘Academic’ advisor assigned in relation to the student’s program and plan. Every undergraduate and graduate student must have an assigned ‘Academic’ advisor.</p> <p><b>Other/Auxiliary Advisor</b> Besides a primary ‘Academic’ advisor, the student may have other defined auxiliary advisor assignments, such as:</p> <ul style="list-style-type: none"> <li>• Center for Academic Excellence, CAE</li> <li>• Career Advisor</li> <li>• Center-Educational Opportunity</li> <li>• Faculty Advisor</li> <li>• Pre-Business/Engr/Pharm/ComArt</li> <li>• Grad Coordinator</li> <li>• Veterans Benefits</li> <li>• Athletics</li> </ul> <p><b>Contact Katie Paar to create new auxiliary advisor type.</b></p>
<p><b>Advisor Number</b></p>	<p>Automatically updates to indicate the order of advisor assignments. This may or may not indicate the number of advisors currently assigned to a student since rows are sometimes deleted and the <i>Advisor Number</i> does not change.</p>
<p><b>Academic Career</b></p> <p>UGRD GRAD</p> 	<p>All students belong to an academic career: Undergraduate, Graduate, Law, Medical, Pharmacy, Vetmed, or Univ Specials Students.</p> <p>All Academic Careers recorded on the Student Program/Plan page as of the <i>Effective Date</i> on the Student Advisor page will be available for selection.</p> <p>Select correct option. (<i>no warning if incorrect selection</i>)</p>
<p><b>Academic Program</b></p> <p>UGRD = Degree (BS, BA) GRAD = Major (Chem)</p> 	<p><i>Academic Career</i> selected above drives the <i>Academic Program</i> selection list.</p> <p>All current Academic Programs recorded on the Student Program/Plan page within the chosen <i>Academic Career</i> as of the <i>Effective Date</i> on the Student Advisor page will be available for selection.</p> <p>Select correct option. (<i>no warning if incorrect selection</i>)</p>
<p><b>Academic Plan</b></p> <p>UGRD = Major (English) GRAD = Degree (MA, MS)</p>	<p><i>Academic Program</i> selected above drives the <i>Academic Plan</i> selection list.</p> <p>All current Academic Plans recorded on the Student Program/Plan page within the chosen <i>Academic Program</i> as of the <i>Effective Date</i> on the Student Advisor page will be available for selection.</p> <p style="text-align: right;"><i>Continues on next page...</i></p>

Field	Description
	<p>If the student has not yet selected an <i>Academic Plan</i>, select 'No Major Code' (e.g., BA 000 or BS 000).</p> <p>Select correct option.</p> <p><b>Note:</b> There is no warning if an incorrect selection is made!</p> <p><b>Special notes for use of <i>Academic Plan</i>:</b></p> <ul style="list-style-type: none"> <li>• <b><u>Auxiliary Advisors:</u> Leave <i>Academic Plan</i> field blank.</b></li> </ul>
<i>Academic Advisor</i>	<p>SIS EmplID of assigned advisor.</p> <p><b>Tip:</b> Use the magnifying glass Look up button to find the advisor you are seeking by L &amp; F <i>Name</i> or <i>Campus ID</i>. <b>This search only looks at active advisors as identified on the Instructor/Advisor Table (☑ Advisor).</b></p> <p>Navigate to &gt;Curriculum Management &gt;Instructor/Advisor Information &gt;Instructor/Advisor Table.</p> <p><b>Contact Debbie Moy &amp; Dana Stav to activate advisor.</b></p>
<i>Advisor Percentage</i>	<p>UW–Madison does not use this field. Leave field empty.</p>
<i>Committee</i>	<p>If you checked <i>Advised by Committee</i>, select committee name.</p> <p><b>Contact Debbie Moy &amp; Dana Stav to create a committee.</b></p>
<input type="checkbox"/> <b>Advised by Committee</b>	<p>Check ☑ if you want to assign a pre-defined committee.</p> <p>When <i>Advised by Committee</i> is checked ☑, the <i>Committee</i> field activates, and the <i>Academic Advisor</i> field inactivates.</p>

## Adding a Student Advisor

To add an advisor to a student's record, follow the steps below:

Step	Action	Result
1.	From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Student Advisor</b>	The Find page displays. <b>Tip:</b> Menu Navigation: >Records and Enrollment >Student Background Information >Student Advisor
2.	Use the Find page to locate the student's record.	The student's information displays on the Student Advisor page.
3.	Select Student Advisor page tab.	The Student Advisor page displays.

**Student Advisor** | Advisor Audit

Student.Stu ID: 0006069527 Campus ID: 9926042988

\*Academic Institution: UWMSN UW-Madison

\*Effective Date: 08/24/2020

**Student Academic Details**

\*Advisor Role: Academic \*Advisor Number: 6

\*Academic Career: UGRD Undergraduate

\*Academic Program: BS General Course - BS Degree

Academic Plan: BS 261 Economics BS

Academic Advisor: 0004748902 Johanning, Alicia Ann

Advisor Percentage:

Committee:

Advised by Committee

Save | Return to Search

When updating, if date is prior to today, change to today's date.

View & Add new Advisor rows here

*Continues on next page...*




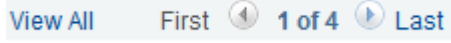
Step	Action	Result
4.	<p>Depending on the student’s advisor record, follow the proper steps below:</p> <hr/> <p><b>If</b></p> <p><b><i>The Academic Advisor OR Committee field is Filled In with Existing Information</i></b></p> <p>Academic Advisor <input type="text" value="0001234567"/> </p> <p>- OR -</p> <p>Committee <input type="text" value="XXXXXX"/> </p> <p><input checked="" type="checkbox"/> Advised by Committee</p> <hr/> <p><b><i>The Academic Advisor AND Committee field is Blank</i></b></p> <p> Academic Advisor <input type="text"/></p> <p> Advisor Percentage <input type="text"/></p> <p>Committee <input type="text"/></p> <p><input type="checkbox"/> Advised by Committee</p> <hr/> <p>*Academic Institution <input type="text" value="UWMSN"/></p> <p>*Effective Date <input type="text" value="today"/> </p> <p><b>ic Details</b></p> <p>*Advisor Role <input type="text" value="Academic"/></p> <p>*Academic Career <input type="text"/></p> <p>*Academic Program <input type="text"/></p> <p>Academic Plan <input type="text"/></p> <p>Academic Advisor <input type="text"/> </p> <p>Advisor Percentage <input type="text"/></p> <p>Committee <input type="text"/></p> <p><input type="checkbox"/> Advised by Committee</p>	<p><b>Then follow these steps:</b></p> <p>a. If <i>Effective Date</i> is prior to today, change <i>Effective Date</i> to today’s date –<b>or</b>– If future dated, leave <i>Effective Date</i> as is.</p> <p>b. Go to last row and select  Add button next to <i>Advisor Number</i>.</p> <p>c. Follow the ‘Is Blank’ procedure below.</p> <hr/> <p>Complete all the fields as advised in the section “<a href="#">Student Advisor Page Field Descriptions</a>”.</p> <p>a. <i>Academic Institution</i> = UWMSN</p> <p>b. <i>Effective Date</i> = <b>today’s date</b> -or- first day of next term</p> <p>c. <i>Advisor Role</i> = ‘Academic’(default) – OR – select appropriate auxiliary <i>Advisor Role</i>.</p> <p>d. <i>Academic Career</i></p> <p>e. <i>Academic Program</i>*</p> <p>f. <i>Academic Plan</i>* <b>IF ‘Academic’, assign <i>Plan</i>.</b> <b>IF NOT Academic, leave <i>Plan</i> BLANK!</b></p> <p>g. <i>Academic Advisor</i>♦, for specific advisor – OR –</p> <p>i. Check <input checked="" type="checkbox"/> <i>Advised by Committee</i> &amp;</p> <p>ii. Select pre-defined <i>Committee</i>*♦.</p> <hr/> <p>* If the correct Academic Program, Plan, or Committee does not appear in the magnifying glass Look up prompts with today’s date, change the <i>Effective Date</i> to the start of the next term. <b>Term Begin</b> and <b>End Dates</b> can be found here: <input type="checkbox"/> Student Records WorkCenter,  Dean/Dept Processing , <b>Session Dates and Deadlines</b>.</p> <p>If the correct program or plan still does not appear, the changes may not have been processed yet or the Major Declaration may not have been submitted. See <input type="checkbox"/> Student Records WorkCenter, <b>Major Dec History</b></p> <p>♦ <b>Contact Debbie Moy &amp; Dana Stav to activate advisor or create committee.</b></p>
5.	Select [Save].	The advisor is saved to the student’s record.




## Changing Student Advisor Information

When you change an advisor on a student’s record, any evidence of the previous information is removed from the system; however, you can view an [audit log](#) of the changes and deletions.

**Note:** Undergraduate advisor updates are completed at the Registrar’s Office when the new advisor information is provided during the declaration/cancellation process.  
If you have a consistent mass change (e.g. replace advisor X with advisor Y), or other changes, see automated options here: <https://registrar.wisc.edu/advisors/>

To change existing advisor information, follow the steps below:

Step	Action	Result
1.	From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Student Advisor</b>	The Find page displays. <b>Tip:</b> Menu Navigation: >Records and Enrollment >Student Background Information >Student Advisor
2.	Use the Find page to locate the student’s record.	The student’s information displays on the Student Advisor page.
3.	Select Student Advisor page tab.	The Student Advisor page displays.
4.	Depending on the student’s advisor record, follow the proper steps below:  <b>If <i>Effective Date</i> is:</b>  Prior to Today  Future Date	<b>Then:</b>  <b>Change <i>Effective Date</i> to current date.</b> *Effective Date <input type="text" value="today"/>   Leave <i>Effective Date</i> as is.
	<b>Tip:</b> You may need to change the <i>Effective Date</i> to the start of the next term if you don’t find the program and/or plan for which you are looking. Term Begin and End Dates can be found here: <input type="checkbox"/> Student Records WorkCenter, [Dean/Dept Processing], <b>Session Dates and Deadlines.</b>	
5.	Find the advisor row you want to change.	<b>Tip:</b> Use row counter bar to move around. - or- Select <u>View All</u> .  
	<i>Continues on next page...</i>	

Step	Action	Result						
6.	<p>Depending on what data needs to be changed, follow the proper steps below:</p> <table border="1" data-bbox="305 310 760 1140"> <thead> <tr> <th data-bbox="305 310 760 359">If you need to change:</th> <th data-bbox="769 310 1414 359">Then follow these steps:</th> </tr> </thead> <tbody> <tr> <td data-bbox="305 359 760 562"> <p><b>One of these fields:</b>  <i>Advisor Role</i>  <i>Academic Plan</i>  <i>Academic Advisor</i>  <i>or Committee</i></p> </td> <td data-bbox="769 359 1414 562"> <p>Select the <i>Advisor Role</i>, <i>Academic Plan</i>, <i>Academic Advisor</i>, or <i>Committee</i> you wish to update.</p> </td> </tr> <tr> <td data-bbox="305 562 760 1140"> <p><b>Multiple Fields</b></p> <p>*Advisor Role <input type="text" value="Academic"/></p> <p>*Academic Career <input type="text" value="UGRD"/></p> <p>*Academic Program <input type="text" value="AMAJ"/></p> <p>Academic Plan <input type="text" value="MAJ 499"/></p> <p>Academic Advisor <input type="text" value="0003078039"/> </p> <p>Advisor Percentage <input type="text"/></p> <p>Committee <input type="text"/></p> <p><input type="checkbox"/> Advised by Committee</p> </td> <td data-bbox="769 562 1414 1140"> <p>a. Update all the fields one by one. *</p> <p><b>-OR-</b></p> <p>a. Select <input type="checkbox"/> Delete button next to <i>Advisor Number</i>. (the lower one!)</p> <p>b. Select [OK]. Verify you want to delete the row.</p> <p>c. If needed, select <input type="checkbox"/> Add for new blank row.</p> <p>d. Using the Look up buttons, enter the new:  - <i>Advisor Role</i> (if other than 'Academic')  - <i>Academic Career</i>  - <i>Academic Program</i>  - <i>Academic Plan</i> (if used)  - <i>Academic Advisor</i> –or– <i>Committee</i></p> </td> </tr> </tbody> </table>	If you need to change:	Then follow these steps:	<p><b>One of these fields:</b>  <i>Advisor Role</i>  <i>Academic Plan</i>  <i>Academic Advisor</i>  <i>or Committee</i></p>	<p>Select the <i>Advisor Role</i>, <i>Academic Plan</i>, <i>Academic Advisor</i>, or <i>Committee</i> you wish to update.</p>	<p><b>Multiple Fields</b></p> <p>*Advisor Role <input type="text" value="Academic"/></p> <p>*Academic Career <input type="text" value="UGRD"/></p> <p>*Academic Program <input type="text" value="AMAJ"/></p> <p>Academic Plan <input type="text" value="MAJ 499"/></p> <p>Academic Advisor <input type="text" value="0003078039"/> </p> <p>Advisor Percentage <input type="text"/></p> <p>Committee <input type="text"/></p> <p><input type="checkbox"/> Advised by Committee</p>	<p>a. Update all the fields one by one. *</p> <p><b>-OR-</b></p> <p>a. Select <input type="checkbox"/> Delete button next to <i>Advisor Number</i>. (the lower one!)</p> <p>b. Select [OK]. Verify you want to delete the row.</p> <p>c. If needed, select <input type="checkbox"/> Add for new blank row.</p> <p>d. Using the Look up buttons, enter the new:  - <i>Advisor Role</i> (if other than 'Academic')  - <i>Academic Career</i>  - <i>Academic Program</i>  - <i>Academic Plan</i> (if used)  - <i>Academic Advisor</i> –or– <i>Committee</i></p>	<p><b>*Special Notes:</b></p> <ul style="list-style-type: none"> <li>• <b>Changes to the <i>Academic Career</i> and/or <i>Academic Program</i> fields will cause the <i>Academic Plan</i> and <i>Academic Advisor/Committee</i> fields to be cleared.</b>  <b>Tip:</b> If the <i>Academic Advisor</i> or <i>Committee</i> will NOT be changing, copy the <i>Academic Advisor</i> ID number or <i>Committee</i> so that it can be pasted back into the <i>Academic Advisor</i> or <i>Committee</i> field after change is made.</li> <li>* If the correct Academic Program, Plan, or Committee does not appear in the magnifying glass Look up prompts with today's date, change the <i>Effective Date</i> to the start of the next term. <b>Term Begin</b> and <b>End Dates</b> can be found here:  <input type="checkbox"/> Student Records WorkCenter,  Dean/Dept Processing , <b>Session Dates and Deadlines</b>.</li> </ul> <p>If the correct program or plan still does not appear, the changes may not have been processed yet or the Major Declaration may not have been submitted. See <input type="checkbox"/> Student Records WorkCenter, <b>Major Dec History</b></p>
If you need to change:	Then follow these steps:							
<p><b>One of these fields:</b>  <i>Advisor Role</i>  <i>Academic Plan</i>  <i>Academic Advisor</i>  <i>or Committee</i></p>	<p>Select the <i>Advisor Role</i>, <i>Academic Plan</i>, <i>Academic Advisor</i>, or <i>Committee</i> you wish to update.</p>							
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7.	Select [Save].	The change is saved to the student's record.						

## Deleting a Student Advisor

Since undergraduate advisors are not archived, **please delete out-of-date advisors.**  
Use the [Audit Log](#) to view previously deleted advisors.

**Note:** Before deleting any advisor that is not within your department, verify assigned advisor(s) is no longer applicable by viewing the [Student Program/Plan](#) page or the [Academic Program Summary](#).

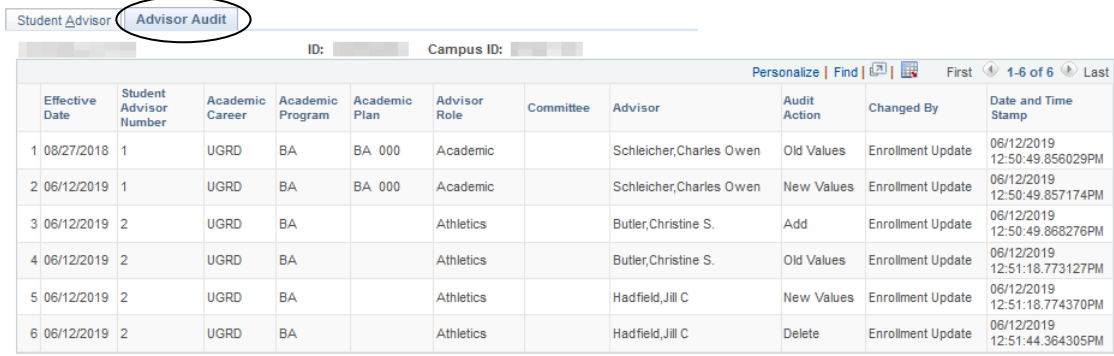
Once an undergraduate student receives a degree, all their advisors are automatically removed from the system. **We keep Graduate students' last advisor(s).**

Follow the steps below to delete an advisor:

Step	Action	Result
1.	From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Student Advisor</b>	The Find page displays. <b>Tip:</b> Menu Navigation: >Records and Enrollment >Student Background Information >Student Advisor
2.	Use the Find page to locate the student's record.	The student's information displays on the Student Advisor page.
3.	Select Student Advisor page tab.	The Student Advisor page displays.
4.	Find the specific advisor row you wish to delete.	<b>Tip:</b> If multiple advisor rows, use <u>View All</u> on the lower row counter bar.
5.	Depending on what you need to delete, follow the proper steps below:	
	<b>If you wish to:</b>	<b>Then follow these steps:</b>
	<b>Delete a single advisor from the list of multiple advisors</b>	Select <input type="checkbox"/> Delete button to the right of the <i>Advisor Number</i> field. (the <b>lower one!</b> )
	<b>Delete the only advisor</b> <b>-OR-</b> <b>Delete all advisors</b>	Select <input type="checkbox"/> Delete button in the <i>Effective Date</i> area. (the <b>upper one!</b> ) <b>!WARNING!</b> If you delete an advisor from the <i>Effective Date</i> row when there are multiple advisors attached to that date, all advisors will be removed!
6.	Select [OK] if you want to delete the advisor.	The advisor information is removed from page. <b>Tip:</b> If you have made a mistake and do not want to delete the row, select [Cancel] or do not save.
7.	Select [Save].	The advisor is permanently removed from the student's record.

## Viewing the Advisor Audit Log

To view changes or deletions that have occurred on this student’s advisor page, follow the steps below:

Step	Action	Result																																																																													
1.	From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Student Advisor</b>	The Find page displays.  <b>Tip:</b> Menu Navigation: >Records and Enrollment >Student Background Information >Student Advisor																																																																													
2.	Use the Find page to locate the student’s record.	The student’s information displays on the Student Advisor page.																																																																													
3.	Select   <b>Advisor Audit</b>   page tab.	The Advisor Audit page displays.																																																																													
 <p>The screenshot shows the 'Advisor Audit' page with a table of audit actions. The table has columns for Effective Date, Student Advisor Number, Academic Career, Academic Program, Academic Plan, Advisor Role, Committee, Advisor, Audit Action, Changed By, and Date and Time Stamp. The table contains 6 rows of data.</p> <table border="1"> <thead> <tr> <th>Effective Date</th> <th>Student Advisor Number</th> <th>Academic Career</th> <th>Academic Program</th> <th>Academic Plan</th> <th>Advisor Role</th> <th>Committee</th> <th>Advisor</th> <th>Audit Action</th> <th>Changed By</th> <th>Date and Time Stamp</th> </tr> </thead> <tbody> <tr> <td>08/27/2018</td> <td>1</td> <td>UGRD</td> <td>BA</td> <td>BA 000</td> <td>Academic</td> <td></td> <td>Schleicher, Charles Owen</td> <td>Old Values</td> <td>Enrollment Update</td> <td>06/12/2019 12:50:49.856029PM</td> </tr> <tr> <td>06/12/2019</td> <td>1</td> <td>UGRD</td> <td>BA</td> <td>BA 000</td> <td>Academic</td> <td></td> <td>Schleicher, Charles Owen</td> <td>New Values</td> <td>Enrollment Update</td> <td>06/12/2019 12:50:49.857174PM</td> </tr> <tr> <td>06/12/2019</td> <td>2</td> <td>UGRD</td> <td>BA</td> <td></td> <td>Athletics</td> <td></td> <td>Butler, Christine S.</td> <td>Add</td> <td>Enrollment Update</td> <td>06/12/2019 12:50:49.868276PM</td> </tr> <tr> <td>06/12/2019</td> <td>2</td> <td>UGRD</td> <td>BA</td> <td></td> <td>Athletics</td> <td></td> <td>Butler, Christine S.</td> <td>Old Values</td> <td>Enrollment Update</td> <td>06/12/2019 12:51:18.773127PM</td> </tr> <tr> <td>06/12/2019</td> <td>2</td> <td>UGRD</td> <td>BA</td> <td></td> <td>Athletics</td> <td></td> <td>Hadfield, Jill C</td> <td>New Values</td> <td>Enrollment Update</td> <td>06/12/2019 12:51:18.774370PM</td> </tr> <tr> <td>06/12/2019</td> <td>2</td> <td>UGRD</td> <td>BA</td> <td></td> <td>Athletics</td> <td></td> <td>Hadfield, Jill C</td> <td>Delete</td> <td>Enrollment Update</td> <td>06/12/2019 12:51:44.364305PM</td> </tr> </tbody> </table>			Effective Date	Student Advisor Number	Academic Career	Academic Program	Academic Plan	Advisor Role	Committee	Advisor	Audit Action	Changed By	Date and Time Stamp	08/27/2018	1	UGRD	BA	BA 000	Academic		Schleicher, Charles Owen	Old Values	Enrollment Update	06/12/2019 12:50:49.856029PM	06/12/2019	1	UGRD	BA	BA 000	Academic		Schleicher, Charles Owen	New Values	Enrollment Update	06/12/2019 12:50:49.857174PM	06/12/2019	2	UGRD	BA		Athletics		Butler, Christine S.	Add	Enrollment Update	06/12/2019 12:50:49.868276PM	06/12/2019	2	UGRD	BA		Athletics		Butler, Christine S.	Old Values	Enrollment Update	06/12/2019 12:51:18.773127PM	06/12/2019	2	UGRD	BA		Athletics		Hadfield, Jill C	New Values	Enrollment Update	06/12/2019 12:51:18.774370PM	06/12/2019	2	UGRD	BA		Athletics		Hadfield, Jill C	Delete	Enrollment Update	06/12/2019 12:51:44.364305PM
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	<i>Effective Date</i> Updated	<ul style="list-style-type: none"> <li>- A change impacts all existing <i>Student Advisor Numbers</i> and captures the ‘Old Values’ and the ‘New Values’. <i>Therefore, some look like duplicate records.*</i></li> <li>- ‘Add’ displays what new advisor was added.</li> <li>- ‘Delete’ displays what was removed.</li> </ul>																																																																													
	<i>Effective Date</i> is kept as is	<ul style="list-style-type: none"> <li>Only the <i>Audit Action</i> is captured for the impacted <i>Student Advisor Number</i>. *</li> <li>- A change displays the ‘Old Values’ and the ‘New Values’.</li> <li>- ‘Delete’ displays what was removed.</li> <li>- ‘Add’ displays what new advisor was added.</li> </ul>																																																																													
	* The <i>Changed By &amp; Date and Time Stamp</i> shows who & when the change was done.																																																																														

## Student Advisor Data Entry Examples

### Graphic Summary of Advisor Assignments

To assist with determining when to fill out Program and Plan versus Program only, see below:

	'Academic' Advisor	Auxiliary Advisor
<b>Fill in</b>		
<b>Program</b>	Select Program	Select Program
<b>Plan</b>	Select Plan	<b>LEAVE PLAN BLANK!</b>

### Academic Advisor General Guidelines

The general guideline for data entry on the [Student Advisor Page](#) for the 'Academic' Advisor Role is to complete the following fields:

- *Effective Date* = Change to today's date if dated prior to today (future date if needed)
- *Advisor Role* = 'Academic' (or change to appropriate auxiliary advisor role)
- *Academic Career*
- *Academic Program*
- *Academic Plan*
- *Academic Advisor or Committee*

By following this procedure, the advisor data will correctly reflect the relationship between the student's academic major and advisor in reports and MyUW.

The screenshot displays the 'Student Advisor' data entry interface. At the top, there are tabs for 'Student Advisor' and 'Advisor Audit'. Below the tabs, the 'Student Advisor' section includes fields for 'ID' and 'Campus ID'. The main form area is divided into two sections: 'Student Academic Details' and 'Advisor Details'. In the 'Student Academic Details' section, the 'Academic Institution' is set to 'UWMSN', the 'Effective Date' is '07/09/2019', and the 'Academic Institution' dropdown is set to 'UW-Madison'. The 'Advisor Details' section includes a dropdown for 'Advisor Role' set to 'Academic', a text field for 'Advisor Number' set to '1', and dropdowns for 'Academic Career' (GRAD), 'Academic Program' (G499), and 'Academic Plan' (PHD 499L&S). The 'Academic Advisor' field is set to '0002600088' and the 'Advisor Percentage' field is empty. The 'Committee' field is also empty, and there is a checkbox for 'Advised by Committee' which is unchecked.

## Undeclared L&S Students AND in Center for Academic Excellence

Students in the College of Letters and Science (L&S) who are admitted into the **Center for Academic Excellence (CAE)** and have not yet declared a major, will be assigned a CAE Program Advisor. This advisor often serves a dual role of 'CAE' advisor as well as 'Academic' advisor.

**You will notice that undeclared L&S students who are in CAE will have two rows with the same advisor name (see image below).**

- 1) One row has the *Advisor Role* of 'Center for Academic Excellence' (**remember to keep *Academic Plan* blank**) and
- 2) an additional row with the *Advisor Role* of '**Academic**' (remember to fill in *Academic Program* and *Academic Plan*).

When the student declares a major, the CAE program advisor assignment will remain; however, the 'Academic' advisor row will be changed to the newly declared *Academic Program*, *Academic Plan*, and *Academic Advisor* or *Committee*.

The screenshot displays the 'Student Academic Details' section of the Student Advisor system. It shows two rows of advisor assignments for a student at UW-Madison. The top row has an 'Advisor Role' of 'Academic', an 'Academic Career' of 'UGRD', and an 'Academic Program' of 'BS'. The bottom row has an 'Advisor Role' of 'Center for Academic Excellence', an 'Academic Career' of 'UGRD', and an 'Academic Program' of 'BS'. Annotations include a box labeled 'Undeclared AND CAE' at the top, a box labeled 'Academic' CAE advisor row removed once major/Plan declared' with an arrow pointing to the top row, and a box labeled 'KEEP!' with an arrow pointing to the bottom row.

## Auxiliary Advisors General Guidelines

An auxiliary advisor is a non-academic advisor. In other words, it generically refers to all other types of advisors. The list of auxiliary advisors is constantly changing, examples include:

- Athletics
- Career Advisor
- Center for Academic Excellence
- Center Educational Opportunity
- Education OURR
- Faculty Advisor
- Firstwave
- Graduate Coordinator
- Honors...
- Korean Flagship Program
- McNair
- Mercile J. Lee Scholars
- PEOPLE
- POSSE
- Pathways
- Pre-Business
- Pre-Communication Arts
- Pre-Engineering
- Pre-Pharmacy
- Russian Flagship Program
- Study Abroad
- Veterans Benefits

The general guideline for data entry on the Student Advisor page for the auxiliary advisor roles is to complete the following fields:

- *Advisor Role* – select appropriate role – NOT ‘academic’ (see sample list above)
- *Academic Career*
- *Academic Program*
- **LEAVE ACADEMIC PLAN BLANK!**
- *Academic Advisor* – enter the Auxiliary Program advisor  
-or- *Advised by Committee* checked and a *Committee identified*

The staff of the auxiliary advisor’s unit is responsible for the maintenance of the data for these roles. The Registrar’s Office does not update or change these assignments. Auxiliary advisors will always be entered on the Student Advisor page with the *Academic Plan* field left blank; therefore, if the student changes Academic Programs, you will need to update accordingly.

The screenshot shows the 'Student Advisor' form in a web application. The form includes fields for 'Academic Institution' (UWMSN), 'Effective Date' (08/24/2020), 'Advisor Role' (Athletics), 'Academic Career' (UGRD), 'Academic Program' (BS), and 'Academic Plan' (blank). The 'Academic Advisor' field is populated with '0003356618' and 'Butler, Christine S.'. The 'Advised by Committee' checkbox is unchecked. Two callout boxes with arrows point to the 'Advisor Role' and 'Academic Plan' fields. The first box contains the text 'Auxiliary Advisor = not 'Academic''. The second box contains the text 'Leave Plan Blank!' in red.



## Advisor Assignments – The Big Picture

### Relationship of Student Advisor Page & Student Program/Plan Page

While both the Student Advisor and Student Program/Plan pages display a student's academic status, **there is no link behind the scenes to update the Student Advisor page when the Student Program/Plan page is changed, and visa versa.**

However, a *relationship* does exist between these two pages. Information must be entered on the Student Program/Plan page by the Registrar's Office **before** it is available for selection on the Student Advisor page. Only data which has been entered on the Student Program/Plan page can be selected from the Student Advisor Look up prompts based on the *Effective Date*.

Therefore, if the student changes his/her academic program or academic plan, both the Student Program/Plan page and the Student Advisor page must be accessed and updated to keep the data synchronized. **Only Registrar Office staff can update Student Program/Plan.**

Navigate to the Student Program/Plan page using:

❑ Student Records WorkCenter, **Student Program/Plan**

-or- >Records and Enrollment >Career and Program Information >Student Program/Plan

The Student Program/Plan page looks like this:

Student Program	Student Plan	Student Sub-Plan	Student Attributes	Student Degrees
Badger, Bucky		ID: [REDACTED]	Campus ID: [REDACTED]	
Academic Career:	Undergraduate	Student Career Nbr 0	Car Req Term:	
Status:	Active in Program	Admit Term:	2015 Fall	
Effective Date	08/29/2016	Effective Sequence	2	
Program Action:	Plan Change	Action Date	09/09/2016	
Action Reason:	Declare major	Requirement Term:	2015 Fall	
Academic Program:	BA			
Academic Plan	BA 201	Communication Arts BA	Major	
Plan Sequence	11	Degree:	BA	
Declare Date	08/29/2016	Degree Checkout Stat:		
Requirement Term	1172 2016 Fall	Student Degree Nbr		
Advisement Status	Include	Completion Term:		

**Tip:** For a complete description of the page above, see the *Student Records Inquiry* manual.

**Note:** On the Student Advisor page you must use an *Effective Date* greater than or equal to the 'active' *Effective Date* on the Student Program/Plan page for the correct data to be available.

## Using the Program/Plan Page to Verify a Student’s Declared Major

The Student Program/Plan page tracks the Academic Career, Academic Program, Academic Plan, and Academic Sub-Plan in which the student has been declared, currently is declared, or will be switching to in the future.

1. Navigate to  Student Records WorkCenter, **Student Program/Plan**  
-or- >Records and Enrollment >Career and Program Information >Student Program/Plan
2. [Clear] fields, especially *Student Career Nbr*, before **searching for a different student**.

### Student Program/Plan

Find an Existing Value

ID begins with

Academic Career =

Student Career Nbr =

...

Search  Clear

Make sure this field is clear!

3. [Search] If a Search Results in multiple rows of data, look at the ***Student Career Number*** for EACH Academic Career as shown below: (e.g. look at each 3 Student Career Nbr)

ID	Academic Career	Student Career Nbr	Program Short Descr	Institution Short Descr	Name	Gender
0004307529	Undergrad	2	AddtlUGMjr	UW-Madison	Badger,Bucky	Male
0004307529	Undergrad	1	Certs-Ugrd	UW-Madison	Badger,Bucky	Male
0004307529	Undergrad	0	BA	UW-Madison	Badger,Bucky	Male
0004307529	Undergrad	0	BA Journ	UW-Madison	Badger,Bucky	Male
0004307529	Undergrad	0	BS	UW-Madison	Badger,Bucky	Male

- Verify that you have only one student displayed by looking at *Campus ID*.
  - The *Program* in the Search Results will be sorted alphabetically, not chronologically, for each *Student Career Number*; therefore, you **cannot** assume the first Academic Program listed is the student’s current Academic Program.
  - All rows associated with the same *Academic Career* **and** *Student Career Number* will display the most recent status for that *Career Number* when you select the row.
  - **You must check each row with a different *Student Career Number* for a given *Academic Career* to determine which rows have an “Active in Program” or “Completed Program” status and which may have been “Discontinued”.**
  - Certs-Ugrd and AddtlUGMjr Program rows must be checked for *Status*.
- Check the Program *Effective Date*.
  - Check the Program *Status*. Look for “Active in Program”.
  - Use the |Student Plan| tab to see Program and Plan on the same page.
  - On the |Student Plan| page, **check the second row counter** bar (immediately above the *Academic Plan* field) to see if a student has **multiple majors in a given Program**. This row counter bar will display 1 of 2 (or more) if the student has multiple majors.

## Using the Academic Program Summary Report to Verify a Current Student's Declared Major(s)

This report summarizes an active student's **current** (as of today) declared Programs/Plans/Subplans including degrees sought, programs, majors, minors, certificates, and any options or tracks. **This will not list past or future programs/plans/subplans.**

To view an active student's current program(s), follow the steps below:

Step	Action	Result
1.	From Home, select: <input type="checkbox"/> Student Records WorkCenter <b>Academic Program Summary</b>	The Academic Program Summary query prompt displays.
2.	Select Empl ID magnifying glass.	
3.	Select <b>Advanced Lookup</b> .	
4.	a) Search for student. b) Select [Look Up]. c) If needed, select correct student from search results.	
5.	Select [View Results].	The student's current Academic Program(s) display.

**U\_SR\_ACAD\_PROG\_SUM - Academic Program Summary**

---

Empl ID

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (3 kb)

View All First 1-

	Name	ID	Campus ID	Career	College	Degree Sought	Program	Plan Type	Plan Descr	Op
1		0005718395		Undergraduate	Univ of Wisconsin - Madison	Certificate	UCRT:Certificates - Undergraduate	CRT	Certificate in Gender and Women's Studies at the Undergraduate Level	
2		0005718395		Undergraduate	College of Letters and Science	Bachelor of Arts	BA:General Course - BA Degree	MAJ	Anthropology	
3		0005718395		Undergraduate	College of Letters and Science	Bachelor of Arts	BA:General Course - BA Degree	MAJ	Communication Arts	Communic Science a Rhetorical

## How Students Can View Their Advisor Information

Students can view their advisor(s) in MyUW's Academic Navigator. By selecting the [Advisors] button, they can view all their 'Advisors'. See <https://kb.wisc.edu/helpdesk/4127>

Academic Navigator

**BUCKY BADGER**  
My Profile - Emergency Info

School/College Human Ecology, School of  
Started Fall 2017 FYR

Alerts (2) Degree & Major (1)

**Advisors (2)**

Advisors (2) X

Alicia HAZEN  
( Career Advisor )  
Email: ALICIA.HAZEN@WISC.EDU

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Amy Bertrand  
( Academic )  
Email: ALBERTRAND@WISC.EDU

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## How Staff Can View Advisor Information

### *Using SIS*

☐ Student Records WorkCenter, **Student Advisor**

-or- >Records and Enrollment >Student Background Information >Student Advisor

Your security determines if you can view and update a student's advisor information:

- If you have advisor **inquiry** access, you will be able to view.
- If you have advisor **update** access, you will be able to add, change, delete, and view.

### *Using MyUW Advising Gateway*

**Advisors** may access a near real-time list of their assigned advisees quickly through MyUW's Advising Gateway. The Advising Gateway provides a single point of access to student record information for advisors.

### *Using Reporting Tools*

1. Use **SIS** to run ad-hoc reports on **active** students using the SIS [Data Center](#), go here:  
☐ **Student Records WorkCenter, |Dean/Dept Processing|, Data Center**  
– or – **>Reporting Tools >Data Center |Students|**  
to run reports based on items such as: 'advised by', Academic Program, Academic Plan, Sub-Plan, Student Group  
**Tip:** Find Program/Plan codes here: <https://kb.wisc.edu/helpdesk/page.php?id=62998>
2. RADAR: <https://search.data.wisc.edu/radar.php>  
See **Advisor Assignments IDE**
3. General Reporting Resources: <https://data.wisc.edu/>  
See **Advisor Assignments IDE**
4. Tableau: <https://dataviz.wisc.edu>  
**Advisors and Assigned Advisees**

## UW–Madison Policy on Academic Advisor Assignments

UW–Madison requires all undergraduates and graduate to have an assigned **Academic** advisor.

### Who is Responsible for the Data on the Student Advisor Page?

Advisor Type	Responsibility
<p><b>Academic Advisors: Undergraduate</b></p>	<p>Academic advisor data on the Student Advisor page for UW–Madison undergraduates is maintained through a cooperative effort of the Office of the Registrar, School/College Academic Student Affairs Offices, and academic departments.</p> <p><b>When YOU identify the new advisor name(s)/id(s) using the Major Declaration process, the Registrar’s Office will update the Student Advisor page to match.</b></p> <p>Advisor changes that are not related to an Academic Program or Plan change are the responsibility of the academic department or the School/College office of Academic Student Affairs.</p> <p>See <a href="https://registrar.wisc.edu/advisors/">https://registrar.wisc.edu/advisors/</a> for other automated advisor assignment processes.</p>
<p><b>Academic Advisors: Graduate</b></p>	<p>All graduate students are required to have at least one assigned ‘academic’ advisor, and the entry and maintenance of current advisor assignments for graduate students is the responsibly of the programs. The Graduate School has issued a guideline that programs use SIS to track advisor assignments and should enter <i>Academic Career</i>, <i>Academic Program</i>, and <i>Academic Plan</i> data when entering the advisor. It is the responsibility of the program to ensure advisor assignments in SIS are up-to-date when students change advisors.</p> <p>Keep the advisor list accurate while they are here. Keep the last advisor(s) listed after the graduate student leaves.</p>
<p><b>Auxiliary Advisors</b></p>	<p>The units coordinating the programs associated with the auxiliary <i>Advisor Roles</i> in SIS are responsible for the entry and maintenance of these advisor assignments. The basic principle for use of these roles is that the auxiliary <i>Advisor Role</i> identifies a person who provides additional student support. A student who has a declared major and is a participant in a program represented by one of the auxiliary advisor roles in SIS will have multiple advisor assignments in SIS.</p>