

Quick Reference Card – Student Lifecycle Management

PIQST00 Change Advisor



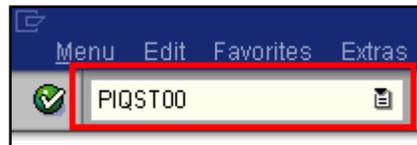
Process: Use this process to change a student’s advisor. Instructions include delimiting a former advisor and adding a new advisor. **Please check with your Dean’s Office to confirm that you should delimit the former advisor.**

Role: Authorized Personnel

Frequency: When Needed

BEGINNING

Enter the transaction code
PIQST00 (two zeros on the end)



STUDENT FILE SCREEN

Type in the **Student Number** and press **Enter** to display the record



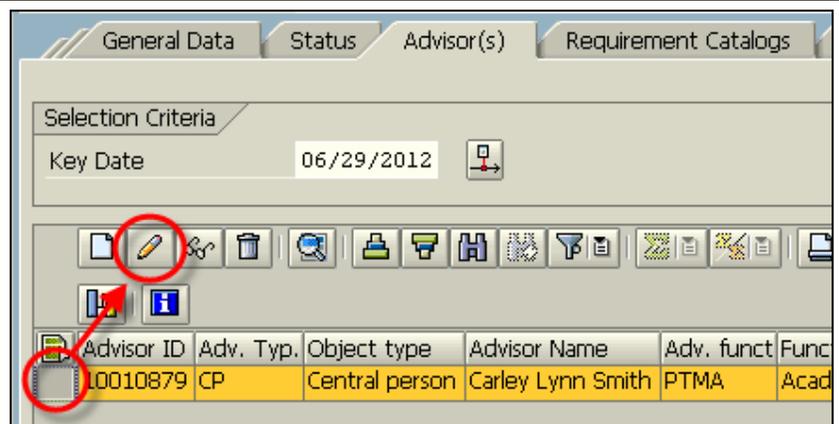
On the **Student File** screen, click on the **Tab List** icon located to the right of the tabs, and then click on **Advisor(s)** to display that tab



ADVISOR(S) TAB

On the **Advisor(s)** tab, click in the gray box to the left of the advisor line you want to delimit (this will highlight the line), and then click on the **Modify**

Advisor icon



Quick Reference Card – Student Lifecycle Management

PIQST00 Change Advisor



A window containing **Advisor Information** appears

Change the **End Date** currently displayed (usually will be 12/31/9999) to the last day in which this advisor will be the student's advisor, and then click the **Save** icon  in the lower left corner of the window

Advisor Information

Advisor Type	CP Central person	
Advisor ID	10010879	Carley Lynn Smith
Advisor Function	PTMA Academic - Main	<input checked="" type="checkbox"/> Main Func
Advising Context Type	Program Type	
Advising Context	10	Undergraduate
Start date	01/01/2010	
End Date	06/30/2012	

Save icon: 

Now add the new advisor

On the **Advisor(s)** tab, click on the **Create Advisor** icon 

General Data | Status | **Advisor(s)** | Requirement Catalogs

Selection Criteria

Key Date: 06/29/2012

Advisor(s) Table:

Advisor ID	Adv. Typ.	Object type	Advisor Name	Adv. funct	Func
10010879	CP	Central person	Carley Lynn Smith	PTMA	Acad

A new window appears where **Advisor Information** can be entered

Student File

Student Information

Student: 10038200 Taylor, Bannon

Advisor Information

Advisor Type		
Advisor ID	<input checked="" type="checkbox"/>	
Advisor Function	<input checked="" type="checkbox"/>	<input type="checkbox"/> Main Func
Advising Context Type		
Advising Context		
Start date	06/29/2012	
End Date	12/31/9999	

Save icon: 

Quick Reference Card – Student Lifecycle Management

PIQST00 Change Advisor



<p>In the Advisor Type field, click the Drop-Down List icon and select CP Central Person</p>																															
<p>Click in the Advisor ID field, and then click on the Possible Entries icon  to perform a search</p>																															
<p>In the search window, click on the Abbreviation and Name tab to select</p> <p>In the Name field, type the full or partial last name of the advisor using the wildcard character (*), and then press Enter</p>																															
<p>When the search results appear, double-click on the appropriate advisor's name to populate the Advisor ID field</p>	<table border="1"> <thead> <tr> <th>Abbrevia</th> <th>Name</th> <th>L</th> <th>PV</th> <th>OT</th> <th>ObjectID</th> </tr> </thead> <tbody> <tr> <td>BROWN</td> <td>ABIGAIL BROWN</td> <td>EN</td> <td>01</td> <td>CP</td> <td>10012689</td> </tr> <tr> <td>BROWN</td> <td>ABIGAIL F BROWN</td> <td>EN</td> <td>01</td> <td>CP</td> <td>10023024</td> </tr> <tr> <td>BROWN</td> <td>ABRIL LINDSEY BROWN</td> <td>EN</td> <td>01</td> <td>CP</td> <td>10015779</td> </tr> <tr> <td>BROWN</td> <td>ALEXIS F BROWN</td> <td>EN</td> <td>01</td> <td>CP</td> <td>10008189</td> </tr> </tbody> </table>	Abbrevia	Name	L	PV	OT	ObjectID	BROWN	ABIGAIL BROWN	EN	01	CP	10012689	BROWN	ABIGAIL F BROWN	EN	01	CP	10023024	BROWN	ABRIL LINDSEY BROWN	EN	01	CP	10015779	BROWN	ALEXIS F BROWN	EN	01	CP	10008189
Abbrevia	Name	L	PV	OT	ObjectID																										
BROWN	ABIGAIL BROWN	EN	01	CP	10012689																										
BROWN	ABIGAIL F BROWN	EN	01	CP	10023024																										
BROWN	ABRIL LINDSEY BROWN	EN	01	CP	10015779																										
BROWN	ALEXIS F BROWN	EN	01	CP	10008189																										
<p>In the Advisor Function field, click the Drop-Down List icon and select Additional or Main, as appropriate</p>																															
<p>Click in the Advising Context field, and then click on the Possible Entries icon  to display the menu</p>																															

Quick Reference Card – Student Lifecycle Management

PIQST00 Change Advisor



In the menu, double-click on the appropriate student **Program Type (Description)** to select

Prog.T...	Program Type (Descrip...
10	Undergraduate
20	Graduate
30	Law
40	PharmD
50	Dentistry
60	Medicine
70	Graduate Professional
80	Continuing Education
90	Undergraduate Pharmacy
91	CESL
98	None
99	Resident House Staff

In the **Start date** field, change the existing date displayed to the date in which this advisor becomes the student's new advisor

Advisor Information	
Advisor Type	CP Central person
Advisor ID	10012689
Advisor Function	PTMA Academic - Main
Advising Context Type	Program Type
Advising Context	10
Start date	07/01/2012
End Date	12/31/9999

Leave the **End Date** as 12/31/9999, but you can change if necessary

Press **Enter** to review and confirm your selections

Click the **Save** icon in the lower-left corner of the window



Note: The **Key Date** field will always default to the current date. Thus, if the **Start Date** for the new advisor is after the current date, you will need to change the **Key Date** to a date on/after the **Start Date** of the new advisor record in order to see and/or verify the new advisor's information on the **Advisor(s)** tab.

General Data	Status	Advisor(s)	Requireme
Selection Criteria			
Key Date		07/01/2012	
Advisor ID	Adv. Typ.	Object type	Advisor Name
10012689	CP	Central person	Abigail Brown