PeopleSoft for the Mandatory Advising Program: Key Advising Milestones

A Comprehensive Manual for Using Required PeopleSoft Panels for the Mandatory Advising Program

PeopleSoft Version 9
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Updated by Martina Stewart
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The Mandatory Advising Program (MAP) requires use of the PeopleSoft record system for administration of its many programs. These programs include:

1. Transfer Student Advising
2. First Year Milestone Advising
3. Second Year Milestone Advising
4. Undeclared Student Advising

Marking the Advisor Meeting panel in PeopleSoft for every MAP appointment is necessary in order to manage advising programs. In many cases, holds are placed that prevent students from registering for courses until they meet with an advisor and the advisor records this meeting in the Advisor Meeting Panel in PeopleSoft.

Access to Mandatory Advising PeopleSoft Panels

In order to gain access to the panels in PeopleSoft used for Mandatory Advising, an advisor must complete the required PeopleSoft for Advisors training. Once the training is completed, contact the trainer to obtain the necessary signature in order to request access to the following panels through the Registrar’s Office (authorization must be provided by head of advisors’ department/agency).

- **ADVSRVW Operator Class:** A level of access available (with the approval of the Registrar’s Office) to advisors for view-only information. This can be requested prior to attending the PeopleSoft for Advisors training.

- **MANDADV Operator Class:** The MANDADV operator class provides access beyond the ADVSRVW Operator Class, which is also necessary to view many panels needed for advising students and performing official functions.

- **SRVCIND for Mandatory Advising:** Allows advisors to view and release holds for 1st Year, 2nd Year, and Undeclared Students. Access to these Operator Classes will be granted once the PeopleSoft for Advisors training has been completed and the completed “Authorization Change Form” with signatures has been sent to the Registrar’s Office.

PeopleSoft for Advisors Trainings are now available online via Canvas.

PeopleSoft Panels and CIS Links used in the Mandatory Advising Program

- Advisor Meetings with Notes functionality
- Service Indicators
- Student Enrollment Appointment
- Update Major/Minor (through the Campus Information Services portal)
New Transfer students who plan to attend the University of Utah must complete an orientation and meet with an academic advisor in the department of their major prior to enrolling in their first semester of courses. In order to clear transfer students to register for their first semester courses, advisors must record the “OrientTran” meeting type on the Advisor Meetings page.

**Record the Transfer Advising Program Meeting in PeopleSoft**

1. From the PeopleSoft portal, go to: **U of U Student Applications, Academic Advising Center, Use, Advisor Meetings-SA1094**
2. Enter the ID on the Search Panel, Click Search
3. On the Advisor Meetings page, click the drop-down box. Select the “OrientTran” meeting type.
4. Click the “Notes” button and make appropriate notes (see Advisor Notes section). Click the “OK” button.
5. Save the Record
**Transfer Advising** Record the Transfer Advisor Meeting

3. **Select “OrientTran”**
   From the drop down box.

4. **Click the “Notes” button**
   Make appropriate notes (see Advisor Notes section). Then click the “OK” button.

5. **SAVE the record!**
   You will see this message: “This student has met the new transfer student advising requirement.” If you don’t get this message, go to UofU Student Applications>Orientation>Use>Transfer Advisor Mtg-SA0869 and manually mark the panel.
First Year Milestone Advising  Overview & Step 1: Eligibility

All first-term freshmen at the University of Utah are required to meet with an Academic Advisor as a part of the Mandatory Advising Program. Advisors record the First Year Milestone Advising appointment in PeopleSoft.

1. Determine the student’s eligibility for First Year Milestone Advising (from any panel)
2. Record the First Year Milestone Advising meeting in the Advisor Meetings Panel. **If the student is eligible for priority registration for 1000 and 2000 level courses, marking this panel will automatically give students priority for the following spring semester, and spring students priority registration for the following fall semester. Remember to tell the student they have priority!**
3. Lift the student’s advising hold (VMA Mandatory Advising, Reason: Freshman Advising)

STEP 1: Determine Eligibility

All First-Term Freshman (students eligible for the First Year Advising Program) will receive both a **Positive Service Indicator** and a **Negative Service Indicator** on their PeopleSoft record. The Positive Service Indicator will be viewable until mid-November. If you see the Positive Service Indicator, the student is eligible for Priority Registration. Advisors can view a student’s Service Indicator information from any screen in PeopleSoft by clicking the “star” and “no-sign” icons at the top of the record on any PeopleSoft panel, or in the **Manage Service Indicators** panel.

Positive Service Indicator

Negative Service Indicator (Hold)

Manage Service Indicators
First Year Advising  Step 2: Record the Meeting and Give Priority

STEP 2: Record the First Year Meeting and Give Priority

1. From the PeopleSoft portal, go to:
   U of U Student Applications, Academic Advising Center, Use, Advisor Meetings—SA1094
2. Enter the ID on the Search Panel, Click Search

1. Path to Panel
   UofU Student Applications > Academic Advising Center > Use > Advisor Meetings –SA1094

2. Search for Student
   Enter ID
   Click Search
**First Year Advising**  Step 2: Record the Meeting & Give Priority

**STEP 2: Continued**

3. Click the drop-down box. Select the “MAP Fresh” meeting type.  **Students who are eligible for priority registration for 1000 and 2000 level courses will automatically receive it for spring (Fall students) or fall (spring students). Remember to tell the student they have priority!**

4. Click the Notes button and make appropriate notes (see the Advisor Notes section). Click the “OK” button.

5. Save the record. **NOTE: Honors students** are also required to meet with an Honors departmental advisor. **Honors advisors** should select the “MAP Fresh” meeting type when recording the meeting.

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3. **Select “MAP Fresh”**
   From the drop down box.

4. **Click the “Notes” button**
   Make appropriate notes (see the Advisor Notes section). Then click the “OK” button.

5. **SAVE the Record!**
   If the student is eligible for priority registration, you will get this message: “Congratulations. This student has priority registration.”
After recording the First Year Milestone Advising meeting in PeopleSoft, it is vital that the advisor remove the Freshman Advising Hold.

**STEP 3: Remove the Hold**

1. From the PeopleSoft portal, go to any PeopleSoft Panel and Click the Star or “No” sign OR go to: 
   - Campus Community > Service Indicators > Person > Manage Service Indicators
2. Enter the ID on the Search panel, click “Search”.
3. The student may have more than one Service Indicator.
4. Click the hyperlink to enter the “VMA” record. VMA is the code for any MAP-related hold. To release the hold, click the “Release” button
5. Verify by clicking “OK” on the next screen. **NOTE: Honors advisors** will remove the “VMA FHNRS” hold and other advisors will remove the “VMA FRESH” hold.

*Note: There will be two service indicators for Freshman Advising. One is the hold:

- Negative Service Indicator (Hold) 
  - Lift the hold to allow the student to register.

- Positive Service Indicator
  - which alerts you to the fact that this student is eligible for Freshman Priority registration. **Only the VMA MANDATORY ADVISING hold can be removed.**

1. **Path to Panel**
   - Campus Community > Service Indicators > Person > Manage Service Indicators

2. **Search for Student**
   - Enter ID 
   - Click Search

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**PeopleSoft Functions for the Mandatory Advising Program**
First Year Milestone Advising  Step 3: Remove the Hold

3. Effect: Select “ALL”

NOTE: V07 is the Positive Service Indicator and CANNOT be removed.

Click on the “VMA” hyperlink.
4. Remove the Hold
Select "Release" in the "Edit Service Indicator" screen.

5. Click “OK”
PeopleSoft Functions for the Mandatory Advising Program

Second Year Milestone Advising Overview and Step 1: Eligibility

All students who are enrolled fall semester with 2-3 prior terms of enrollment at the University of Utah and 90 or fewer credit hours are required to meet with an academic advisor in the department of their major as a part of the Mandatory Advising Program (MAP). Advisors record the Second Year Milestone Advising appointment in PeopleSoft.

1. Determine whether the student is being seen for Second Year Milestone Advising by checking Service Indicators (from any PeopleSoft panel).
2. Record the advising meeting and make appropriate notes (see Advisor Notes section).
3. If appropriate, declare students' major (or pre/intermediate major, if appropriate) in CIS.
4. Remove the hold (if present).

Students have from November to February to meet with an academic advisor. If the student comes in past the deadline, the student will have a hold (VMA Second Year Advising) which advisors must also lift in order for students to be able to register for Summer/Fall courses. **NOTE: Honors students** are required to meet with an Honors and Departmental advisor.

**STEP 1: Determining Eligibility**

Dependent on when a Second Year student comes in for advising, the student will either have a Positive Service Indicator only

- Positive Service Indicator

Or a Positive and Negative Service indicator

- Positive Service Indicator

- Negative Service Indicator (Hold)

If the student comes in for advising March or later after the hold has been placed, the advisor must remove the hold.

**Manage Service Indicators**

<table>
<thead>
<tr>
<th>Code</th>
<th>Code Description</th>
<th>Reason Description</th>
<th>Institution</th>
<th>Start Term</th>
<th>Start Term Description</th>
<th>End Term</th>
<th>End Term Description</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>V2Y</td>
<td>University College - Second Yr Advising</td>
<td>Second Year Advising</td>
<td>UOFU</td>
<td>0000</td>
<td>Begin Term</td>
<td>10/15/2010</td>
<td></td>
<td></td>
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<tr>
<td>VMA</td>
<td>University College - Second Yr Advising</td>
<td>Second Year Advising</td>
<td>UOFU</td>
<td>0000</td>
<td>Begin Term</td>
<td>10/15/2010</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Record the Second Year Advising Program Meeting in PeopleSoft

Once it is clear that a student is seeking advising for the Second Year Milestone Advising, advisors must mark the Advisor Meeting Panel. Marking the Advisor Meeting Panel prior to the March deadline will ensure that a student does not receive a Second Year Advising hold.

*Note:* Many students do not state that their appointment is regarding 2nd Year Advising. In many cases, advisors must check PeopleSoft to make that determination.

1. From the PeopleSoft portal, go to:  
   **U of U Student Applications, Academic Advising Center, Use, Advisor Meetings - SA1094**
2. Enter the ID on the Search panel, click "Search."
3. Click the drop-down box. Select the “MAP 2nd Yr” meeting type. **NOTE:** Honors advisors will select the “HON MAP 2” meeting type.
4. Click the Notes button and make appropriate notes (see the Advisor Notes section). Click the “OK” button.
5. Save the record.
PeopleSoft Functions for the Mandatory Advising Program

Second Year Advising Step 2: Record the Second Year Meeting

3. Select “MAP 2nd Yr” from the drop down box.

4. Click the “Notes” button. Make appropriate notes (see Advisor Notes section). Then click the “OK” button.

5. SAVE the Record!
Second Year Advising  Step 3: Declare a Major in CIS

While most changes to a student’s record take place within the PeopleSoft interface, declaring a student’s major takes place via a web application accessed through the Student Admin Services page within the Campus Information Services portal. Detailed instructions on how to change a major/minor can be accessed by clicking on the question mark on the upper right hand side of the Change Major/Minor tile:

Any questions regarding adding, changing, a major or minor should be directed to the Registrars Office at (801) 581-8969 or Registrar@sa.utah.edu

STEP 3: Declare a Major in the Campus Information Services portal

1. Log into CIS: https://gate.acs.utah.edu
2. Select the Student Admin Services option from the drop down menu in the middle of the page
3. Look for the Change Major/Minor box and icon
4. Click the question mark in the upper right hand corner of the tile for instructions on how to use the “Change Major/Minor” web application.
5. Click “Change Major/Minor” to access the web application.
After recording the 2nd Year Advising Program Meeting in PeopleSoft, it is vital that the advisor remove the 2nd Year Advising Hold.

**STEP 4: Remove the Hold**
1. From the PeopleSoft portal, go to any PeopleSoft Panel and Click the Star or “No” sign OR go to: **Campus Community, Service Indicators, Person, Manage Service Indicators**
2. Enter the ID on the Search panel, click “Search”.
3. The student may have more than one Service Indicator.
4. Click the hyperlink to enter the “VMA” record. VMA is the code for any MAP-related hold. To release the hold, click the “Release” button and verify by clicking “OK” on the next panel. **Note: Honors advisors will remove the “VMA 2HNRS” hold.**

**Note:** If a 2nd Year student meets with an academic advisor before the deadline, there will only be a positive service indicator, there will be no hold to remove.

### Positive Service Indicator

*If the student has a 2nd Year Advising hold, there will be two service indicators for 2nd Year Advising. One is the hold,*

*Negative Service Indicator (Hold)*

**Lift the hold to allow the student to register.**

*The other is the positive service indicator which notifies the advisor that the student is part of the Second Year advising Program.*

### Manage Service Indicators

- Enter any information you have and click Search. Leave fields blank for a list of:

  **Find an Existing Value**

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<thead>
<tr>
<th>Maximum number of rows to return (up to 300): 300</th>
</tr>
</thead>
<tbody>
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</tr>
<tr>
<td>Campus ID: begins with</td>
</tr>
<tr>
<td>National ID: begins with</td>
</tr>
<tr>
<td>Last Name: begins with</td>
</tr>
<tr>
<td>First Name: begins with</td>
</tr>
</tbody>
</table>

- **Search**
- **Clear**
- **Basic Search**

**Search Results**

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<th>Date of Birth</th>
<th>Graduation Year</th>
<th>Campus</th>
<th>Country</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Name</td>
<td>student</td>
<td>2000-01-01</td>
<td>2024</td>
<td>University</td>
<td>USA</td>
<td></td>
</tr>
</tbody>
</table>

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**1. Path to**

**Campus Community > Service Indicators > Person > Manage Service Indicators**

**2. Search for Student**

Enter ID
Click Search
Second Year Advising Step 4: Remove the Hold

3. Effect: Select “ALL”

NOTE: V07 is the Positive Service Indicator and CANNOT be removed.

4. Remove the Hold

By clicking the “VMA” hyperlink, selecting “Release” in the “Edit Service Indicator” screen, and verifying by clicking “OK” on the next panel.
All undeclared students who have completed 60 or more credits and have had at least 2 semesters of enrollment at the University of Utah are required to meet with an academic advisor as a part of the Mandatory Advising Program (MAP). They must meet with a departmental advisor to declare their major (or pre/intermediate major, if appropriate) or meet with an Academic Advising Center advisor to begin the process of major exploration. Advisors record the Undeclared Advising appointment in PeopleSoft.

1. Determine whether the student has an undeclared student advising hold (from any PeopleSoft panel).
2. Record the advising meeting.
3. Declare students’ major (or pre/intermediate major, if appropriate) in CIS.
4. Remove the Negative Service Indicator (hold).

**STEP 1: Determine Eligibility**

All Undeclared Students with 60 hours or more and two semesters at the University of Utah will have a **Negative Service Indicator** on their PeopleSoft record. Advisors can view a student’s Service Indicator information from any screen in PeopleSoft by clicking the “star” and “no-sign” icons at the top of the record on any PeopleSoft panel, or in the Service Indicator Data panel.

Negative Service Indicator (Hold)

Lifting the student’s registration hold is necessary when meeting with an Undeclared student as a part of the MAP Undeclared Advising Program.
**Undeclared Advising** Step 2: Record the Undeclared Meeting

**STEP 2: Record the Undeclared Program Meeting in PeopleSoft**

1. From the PeopleSoft portal, go to:
   - **U of U Student Applications, Academic Advising Center, Use, Advisor Meetings - SA1094**
2. Enter the ID on the Search panel, click "Search."
3. Click the drop-down box. Select the "MAP Undecl" meeting type.
4. Click the Notes button and make appropriate notes (see the Advisor Notes section). Click the "OK" button after making notes.
5. Save the record.
**Undeclared Advising** Step 2: Record the Undeclared Meeting

**INTRODUCTION**

**TRANSFER**

**1ST YEAR**

**2ND YEAR**

**UNDECLARED**

**ADVISOR NOTES**

3. Select “MAP Undecl” From the drop down box.

4. Click the “Notes” button

Make appropriate notes (see Advisor Notes section). Then click the “OK” button.

5. SAVE the Record!
Undeclared Advising Step 3: Declare a Major in CIS

While most changes to a student’s record take place within the PeopleSoft interface, declaring a student’s major takes place via a web application accessed through the Student Admin Services page within the Campus Information Services portal. Detailed instructions on how to change a major/minor can be accessed by clicking on the question mark on the upper right hand side of the Change Major/Minor tile:

Any questions regarding adding, changing, a major or minor should be directed to the Registrars Office at (801) 581-8969 or Registrar@sa.utah.edu

STEP 3: Declare a Major in the Campus Information Systems (CIS):

1. Log into CIS: https://gate.acs.utah.edu
2. Select the Student Admin Services option from the drop down menu in the middle of the page
3. Look for the Change Major/Minor box and icon
4. Click the question mark in the upper right hand corner of the tile for instructions on how to use the “Change Major/Minor” web application.
5. Click “Change Major/Minor” to access the web application.
**Undeclared Advising** Step 4: Remove the Hold

After recording the Undeclared Advising Program Meeting in PeopleSoft, it is vital that the advisor remove the Undeclared Advising Hold.

**STEP 3: Removing the Hold**

1. From the PeopleSoft portal, go to any PeopleSoft Panel and Click the Star of "No" sign OR go to:
   Campus Community, Service Indicators, Person, Manage Service Indicators
2. Enter the ID on the Search panel, click "Search".
3. The student may have more than one Service Indicator.
4. Click the hyperlink to enter the "VMA" record. VMA is the code for an MAP-related hold. To release the hold, click the "Release" button and verify by clicking "OK" on the next panel.

Lift the hold to allow the student to register.
*Note: There will be no positive service indicator for Undeclared Student Advising.*
Mandatory Advising Program

3. Effect: Select “ALL”

4. Remove the Hold
   By clicking the “VMA” hyperlink, selecting “Release” in the “Edit Service Indicator” screen, and verifying by clicking “OK” on the next panel.
PeopleSoft Advisor Notes Overview and Guidelines

Overview of PeopleSoft Advisor Notes Functionality

Recording academically relevant notes in PeopleSoft is an important part of the Mandatory Advising Program. Advisors who have had access to clear holds for Mandatory Advising have access to Advisor Notes. Advisors who have not had access to clear holds for Mandatory Advising do NOT have access to Advisor Notes.

Guidelines for Using PeopleSoft Advisor Notes

PeopleSoft Advisor Notes Guidelines are included below and are available through a hyperlink on the PeopleSoft Advisor Meetings Panel. PeopleSoft Notes Guidelines were developed by a committee of academic advisors and support professionals and were approved by the University of Utah’s legal counsel.

UAAC Advisor Resources:
PeopleSoft Notes Guidelines

Benefits of Notes

Advisors are encouraged to document advising interactions with their students. Documentation 1) increases communication between departments, 2) Improves advising relationships with students and 3) provides continuity and consistency in advising across campus.

Getting Access to Notes in PeopleSoft

Advisors gain access to the use of the “Notes” panel after receiving Mandatory Advising/PeopleSoft Notes training and requesting additional access to Mandatory Advising panels on the PeopleSoft Security Access form. This form also requires appropriate signatures from the department administrator. For more information, please contact Steve Hadley (shadley@advising.utah.edu).

FERPA Regulations

Advisor notes created and maintained in PeopleSoft are to be kept in accordance with existing FERPA Laws. For complete information on University of Utah FERPA guidelines, contact the Registrar’s Office.
PeopleSoft Advisor Notes Guidelines

UAAC Advisor Resources:
PeopleSoft Notes Guidelines (continued)

Note Taking Guidelines

1. Inform the student that advisors make academically pertinent notes which are viewable by other advisors. For example, “I will be writing some notes after our conversation to record the gist of what we talked about today, and any follow up that you or I will take. These notes will be stored in our student database and may be seen by another academic advisor. This is so that we can best help you with your advising questions.”

2. Remember that students can request access to these notes, and that they can be subpoenaed by third parties under FERPA guidelines. Use a professional tone when recording advisor/student interactions.

3. Keep notes brief and relevant, and use only the most commonly understood abbreviations (i.e., DARS, Gen Ed, UC, requirement codes such as IR, DV, etc).

4. Record facts and observations, and NOT inferences or assumptions. For example, we would not write, “student seems depressed” or “student seems anxious”, but rather, “student talked about personal issues which are currently stressors/challenges”.

5. Record any advising interactions that will require future follow up on the part of the student or advisor.

6. If there is room for question or misunderstanding regarding information provided to a student during an advising session, record details on advice given in case of future questions. For example, “Advised student that History 1700 from SLCC would clear AI requirement, but if student chooses to take History 2700, will also need 2710.”

7. Advisors are expected to document referrals to other departments and campus agencies. If the referral is of a sensitive nature (for example, to the Center for Disability Services or the Counseling Center), advisor can write, “Student referred to appropriate department/agency”.

8. Document information given regarding University and Department Policies and Deadlines. For example, “Student had questions about withdrawing from her math class. Provided form, deadline, and documentation requirements.”

9. Sensitive information should only be included in your notes when academically relevant. For example, specific student behavior issues (accusations of plagiarism, Dean of Student interventions), very personal information about a student, their health, family, etc. should be handled with discretion. The focus should be on the impact of the issue on the student’s performance rather than the precise nature of the issue.

10. REMEMBER: You can keep notes in a separate, personal file if there is something you need to remember, but do not want included on the student’s PeopleSoft record. If you keep personal notes, you must protect the confidentiality of those notes, keep them for only as long as relevant, and take care to destroy them in a confidential manner. If you share personal notes with any other University personnel, it becomes part of the student’s FERPA record.

Revised 2016
PeopleSoft Advisor Notes: Recording and Viewing Advisor Notes

Recording and Viewing Advisor Notes in PeopleSoft

1. From the PeopleSoft portal, go to:
   U of U Student Applications, Academic Advising Center, Use, Advisor Meetings—SA1094
2. Enter the ID on the Search Panel, Click Search.
3. On the Advisor Meetings page, click the drop-down box. Select the type of meeting you had with the Student (90+ Hour/Acad Stnd/General/HON MAP 2/MAP 2nd Yr/MAP Fresh/MAP Undecl/OrientFsh/OrientTran/Petition).
4. Click the “Notes” button.
5. A dialog box will open. Type academically relevant advisor notes into dialog box (utilize Guidelines for Advisor Notes for constructing appropriate Advisor Notes.)
6. Click “OK”. Clicking “OK” will bring back the Advisor Meeting Panel.
7. Save the Record.
8. To View previously recorded notes, click the “Notes” button, or to view all notes on one panel, click the “View Advisor Notes” tab.

Note: Advisors cannot change previously recorded notes authored by other advisors.
PeopleSoft Functions for the Mandatory Advising Program

**PeopleSoft Advisor Notes:** Recording and Viewing Advisor Notes

1. Type academically relevant notes in dialog box.
2. SAVE the Record!
3. Click “OK”

To View: Click on the “Notes” button, or to view all notes on one panel, click the “View Advisor Notes” tab. **Note:** Advisors cannot change previously recorded notes authored by other advisors.