

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

PeopleSoft for the Mandatory Advising Program

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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)

Transfer Advising Record the Transfer Advisor Meeting

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

The screenshot shows the PeopleSoft interface for 'Advisor Meetings - SA1094'. A yellow oval highlights the navigation path: 'UofU Student Applications > Academic Advising Center > Use > Advisor Meetings -SA1094'. A black box highlights the search section, which includes a 'Find an Existing Value' button, a 'Maximum number of rows to return (up to 300): 300' field, and search criteria for ID, Campus ID, National ID, Last Name, and First Name, each with a 'begins with' dropdown. A 'Search' button is visible. A second yellow oval highlights the search instructions: 'Enter ID Click Search'.

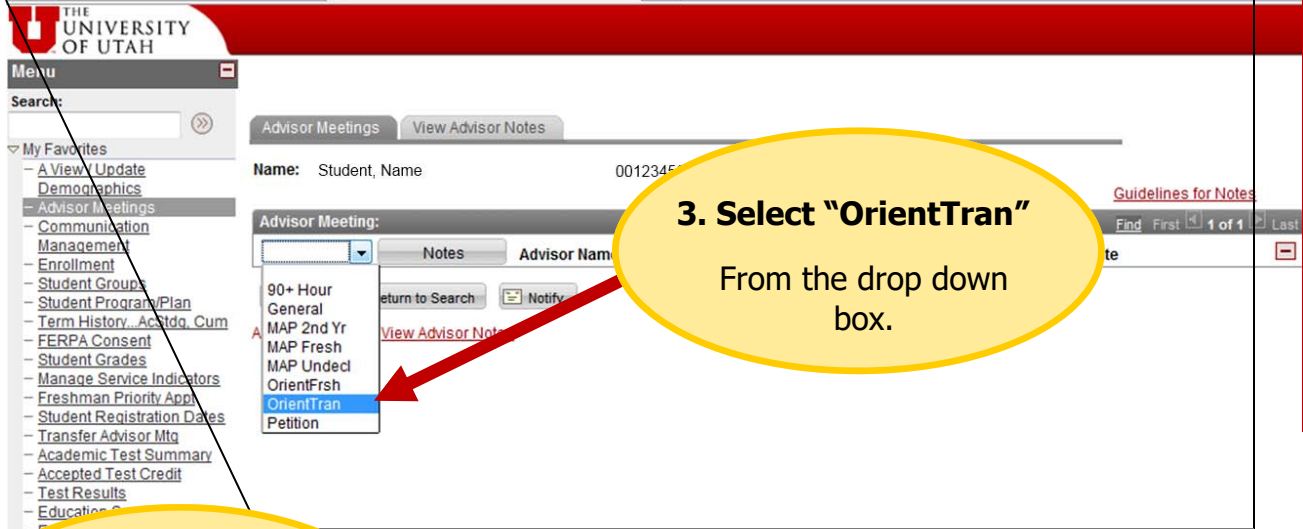
1. Path to Panel

UofU Student Applications > Academic Advising Center > Use > Advisor Meetings -SA1094

2. Search for Student

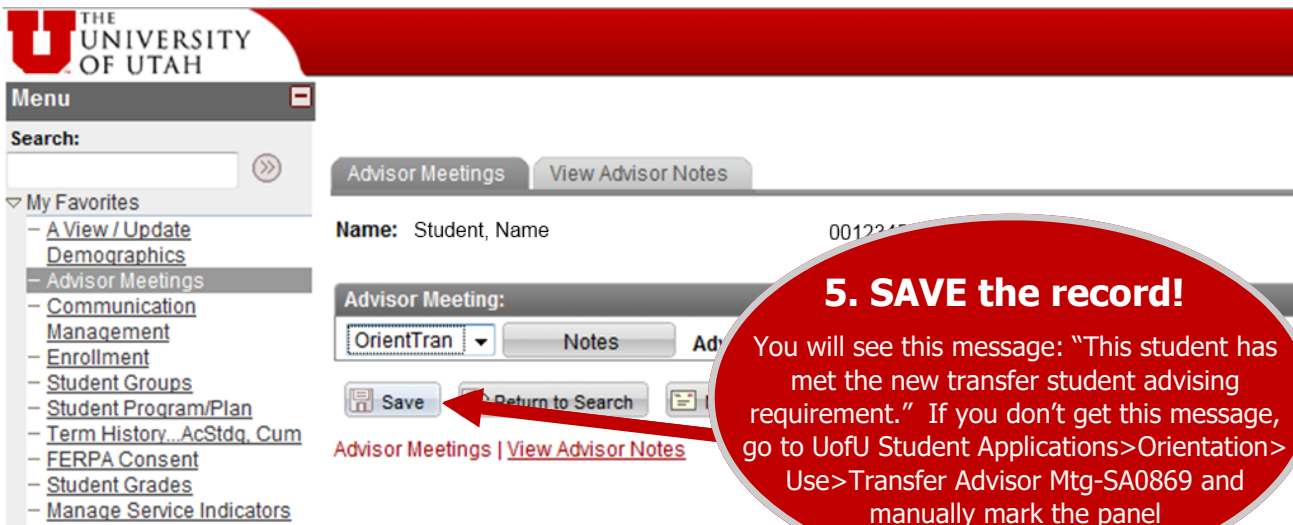
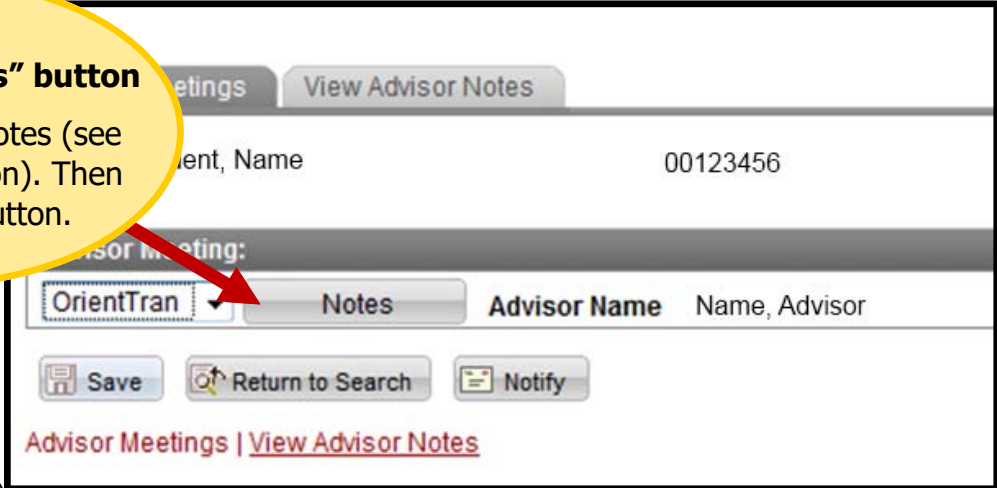
Enter ID
Click Search

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 fall 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

Name: Name, Student 00123456

Display: Effect All Institution University of Utah Refresh

[+ Add Service Indicator](#)

Service Indicator Summary									
Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
V07	Univ College - Fresh Priority	Freshman Priority Registration	UOFU	0000	Begin Term			09/23/2010	
VMA	Mandatory Advising	Freshman Advising	UOFU	0000	Begin Term			09/27/2010	

[+ Add Service Indicator](#)

[Return to Search](#) [Notify](#)

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

- Click the drop-down box. Select the "MAP Fresh" meeting type. Click "Save".
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!
- Click the Notes button and make appropriate notes (see the Advisor Notes section). Mark the Learning Outcomes you covered. Click the "OK" button.
- 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.

3. Select "MAP Fresh"
From the drop down box. Click "Save". If the student is eligible for priority, you will get this message: "Congratulations. This student has priority registration."

4. Click the "Notes" button
Make appropriate notes (see the Advisor Notes section). Mark the Learning Outcomes you covered. Then click the "OK" button.

5. SAVE the Record!

First Year Milestone Advising Step 3: Remove the Hold

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.

The other is the:

 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.**

Manage Service Indicators

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

Find an Existing Value

Maximum number of rows to return (up to 300):


ID:

Campus ID:

National ID:

Last Name:

First Name:

[Basic Search](#)  [Save Search Criteria](#)

Search Results

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
00123456	Name, Student								

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

2. Search for Student

Enter ID
Click Search

First Year Milestone Advising Step 3: Remove the Hold

Manage Service Indicators

Name: Name, Student 001

Display: Effect **All** Institution University of Utah Refresh

3. Effect: Select "ALL"

+ Add Service Indicator

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
V07	Univ College - Fresh Priority	Freshman Priority Registration	UOFU	0000	Begin Term			09/23/2010	
VMA	Mandatory Advising	Freshman Advising	UOFU	0000	Begin Term			09/27/2010	

+ Add Service Indicator

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

Return to Search Notify

Manage Service Indicators

Name: Name, Student 00123456

Display: Effect **All** Institution University of Utah Refresh

+ Add Service Indicator

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
V07	Univ College - Fresh Priority	Freshman Priority Registration	UOFU	0000	Begin Term			09/23/2010	
VMA	Mandatory Advising	Freshman Advising	UOFU	0000	Begin Term			09/27/2010	

+ Add Service Indicator

Click on the "VMA" hyperlink.

Return to Search Notify

First Year Milestone Advising Step 3: Remove the Hold

Edit Service Indicator

Name: Student, Name 00123456

***Institution:** UOFU University of Utah

***Service Indicator Code:** VMA Mandatory Advising

***Service Ind Reason Code:** FRESH Freshman Advising

Description: This hold prevents registering for classes. Please contact 801/581-8146 for more information.

Effect: Negative

Effective Period

Start Term: 0000	Begin Term	End Term:
Start Date: 08/19/2011		End Date:

Assignment Details

***Department:** 00301

Reference:

Amount: 0.000

Contact Information

Release

4. Remove the Hold
Select "Release" in the "Edit Service Indicator" screen.

THE UNIVERSITY OF UTAH

Menu

Search:

- My Favorites
 - View / Update
 - Demographics
 - Advisor Meetings
 - Communication Management
 - Enrollment
 - Student Groups

Are you sure you want to release this Service Indicator?

OK Cancel

5. Click "OK"

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

Name: Name, Student 00123456

Display: **Effect** All Institution University of Utah Refresh

+ Add Service Indicator

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
V2Y	Univ College - Second Yr Advis	Second Year Advising	UOFU	0000	Begin Term			10/15/2010	
VMA	Univ College - Second Yr Advis	Second Year Advising	UOFU	0000	Begin Term			10/15/2010	

+ Add Service Indicator

Second Year Advising Step 2: Record the Second Year Meeting

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. Click "Save".
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). Mark the Learning Outcomes you covered. Click the "OK" button.
5. Save the record.

The screenshot shows the PeopleSoft interface. On the left is a navigation menu with 'Advisor Meetings' highlighted. The main content area is titled 'Advisor Meetings - SA1094' and contains a search form. A yellow callout bubble points to the navigation path: 'U of U Student Applications, Academic Advising Center, Use, Advisor Meetings - SA1094'. Another yellow callout bubble points to the search form, with the text '2. Search for Student' and 'Enter ID Click Search'. The search form includes fields for ID, Campus ID, National ID, Last Name, and First Name, each with a 'begins with' dropdown menu. There are also buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Second Year Advising Step 2: Record the Second Year Meeting

The screenshot shows the University of Utah's advising system interface. On the left is a 'Menu' with a search bar and a list of navigation options including 'Advisor Meetings', 'Communication Management', 'Enrollment', 'Student Groups', 'Student Program/Plan', 'Term History... AcStdg, Cum', 'FERPA Consent', 'Student Grades', 'Manage Service Indicators', 'Freshman Priority Appt', 'Student Registration Dates', 'Transfer Advisor Mtg', 'Academic Test Summary', 'Accepted Test Credit', 'Test Results', 'Education Summary_xfer', 'External Education_xfer', 'Transcript Request', 'Add to Favorites', and 'Edit Favorites'. The main area displays 'Advisor Meetings' and 'View Advisor Notes' tabs. Below the tabs, the student's name is 'Student, Name' and the ID is '00123456'. The 'Advisor Meeting:' dropdown menu is open, showing options: '90+ Hour General', 'MAP 2nd Yr' (highlighted in blue), 'MAP Fresh', 'MAP Undecl', 'OrientFrsh', 'OrientTran', and 'Petition'. A yellow callout bubble points to the dropdown menu with the text: '3. Select "MAP 2nd Yr" From the drop down box. Click "Save".'

This screenshot shows the 'Advisor Meeting' form with 'MAP 2nd Yr' selected in the dropdown menu. The 'Notes' button is highlighted with a red arrow. The student's name is 'Student, Name' and the ID is '00123456'. Below the form are buttons for 'Save', 'Return to Search', and 'Notify'. A yellow callout bubble points to the 'Notes' button with the text: '4. Click the "Notes" button Make appropriate notes (see Advisor Notes section). Mark the Learning Outcomes you covered. Then click the "OK" button.'

5. SAVE the Record!

This screenshot shows the 'Advisor Meeting' form with the 'Save' button highlighted by a red arrow. The student's name is 'Student, Name' and the ID is '00123456'. The 'Advisor Meeting:' dropdown menu is still set to 'MAP 2nd Yr'. Below the form are buttons for 'Save', 'Return to Search', and 'Notify'. A yellow callout bubble points to the 'Save' button with the text: '5. SAVE the Record!'. At the bottom, there are links for 'Advisor Meetings' and 'View Advisor Notes'.

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 Advisor Homepage within the Campus Information Services portal. Click on the Change Major/Minor tile to declare/change the student's major:



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 (CIS)

1. Log into CIS:
<https://gate.acs.utah.edu>
2. Click on "Campus Solutions (HE)".
3. Look for the **Change Major/Minor** box and icon
4. Click "Change Major/Minor" to access the web application.

Second Year Advising Step 4: Remove the Hold

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.



Positive Service Indicator

Manage Service Indicators

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

Find an Existing Value

Maximum number of rows to return (up to 300):

ID:

Campus ID:

National ID:

Last Name:

First Name:

[Basic Search](#)

1. Path to panel
Campus Community >
Service Indicators > Person >
Manage Service Indicators

2. Search for Student

Enter ID
 Click Search

Search Results

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Descript
00123456	Name, Student						

Second Year Advising Step 4: Remove the Hold

Manage Service Indicators

Name: Name, Student

00123456

3. Effect: Select "ALL"

Display: Effect **All** Institution

University of Utah

+ Add Service Indicator

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
V2Y	Univ College - Second Yr Advis	Second Year Advising	UOFU	0000	Begin Term			10/15/2010	
VMA	Univ College - Second Yr Advis	Second Year Advising	UOFU	0000	Begin Term			10/15/2010	

NOTE: V2Y is the Positive Services Indicator and CANNOT be removed.

+ Add Service Indicator

New window Help

Edit Service Indicator

Name: Name, Student

00123456

Release

*Institution: UOFU University of Utah
*Service Indicator Code: VMA Mandatory Advising
*Service Ind Reason Code: 45HR 2nd Year Advising

Description: This hold prevents registering for classes. Please contact 801/581-8146 for more information.

Effect: Negative

Effective Period

Start Term: 0000 Begin Term End Term: End Date: 09/27/2010

Assignment Details

*Department: 00301

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.

Undeclared Advising Overview and Step 1: Eligibility

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.

Manage Service Indicators

Name: Name, Student 00123456 

Display: Effect All Institution University of Utah [Refresh](#) 

[+ Add Service Indicator](#)

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
VMA	Univ College - Undeclared	Undeclared Advising	UNFU	0000	Begin Term			10/15/2010	

[+ Add Service Indicator](#)

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.

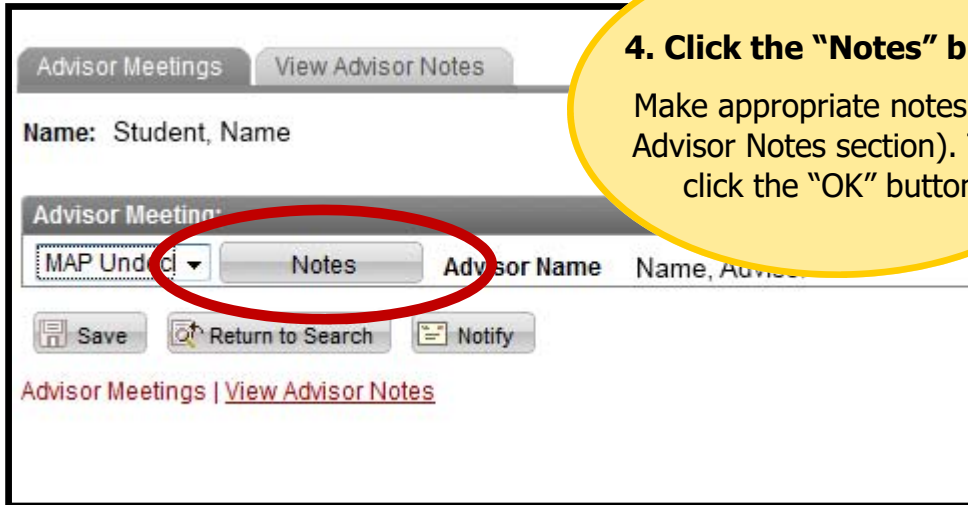
The screenshot shows the PeopleSoft interface for 'Advisor Meetings - SA1094'. On the left is a navigation menu with 'Advisor Meetings' selected. The main area contains a search form with fields for ID, Campus ID, National ID, Last Name, and First Name, each with a 'begins with' dropdown. A yellow callout bubble labeled '1. Path to Panel' points to the navigation menu and contains the text: 'UofU Student Applications > Academic Advising Center > Use > Advisor Meetings - SA1094'. A second yellow callout bubble labeled '2. Search for Student' points to the search form and contains the text: 'Enter ID' and 'Click Search'. The interface also includes a 'Search' button, a 'Clear' button, and a 'Basic Search' link.

Undeclared Advising Step 2: Record the Undeclared Meeting



3. Select "MAP Undecl"

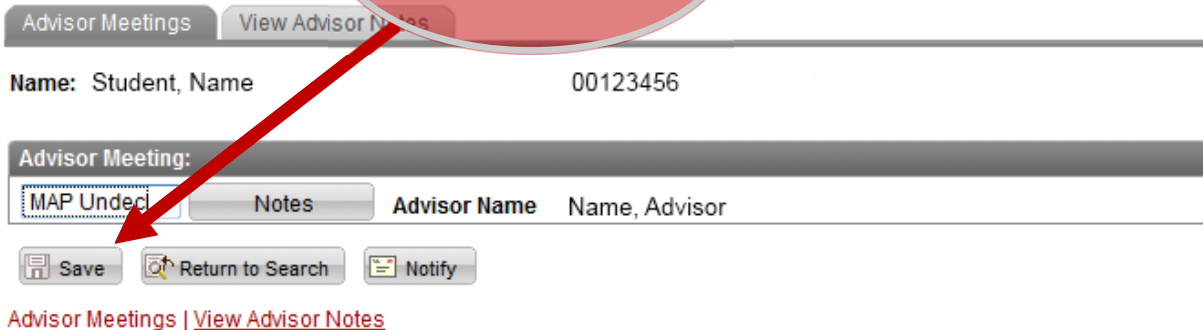
From the drop down box. Click "Save".



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 Advisor Homepage within the Campus Information Services portal. Click on the Change Major/Minor tile to declare/change the student's major:



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 (CIS):

1. Log into CIS:
<https://gate.acs.utah.edu>
2. Click on "Campus Solutions (HE)".
3. Look for the **Change Major/Minor** box and icon
4. 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.

Manage Service Indicators

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

Find an Existing Value

Maximum number of rows to return (up to 300):

ID:

Campus ID:

National ID:

Last Name:

First Name:

[Basic Search](#)

1. Path to Panel

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

2. Search for Student

Enter ID
Click Search

Search Results

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
00123456	Name, Student								

Undeclared Advising Step 4: Remove the Hold

3. Effect: Select "ALL"

Manage Service Indicators

Name: Name, Student

00123456

Display: Effect **All**

Institution University of Utah

[Refresh](#)

[+ Add Service Indicator](#)

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
VMA	Univ College - Undeclared	Undeclared Advising	UOFU	0000	Begin Term			10/15/2010	

[+ Add Service Indicator](#)

Edit Service Indicator

Name: Name, Student

00123456

[Release](#)

*Institution: University of Utah
*Service Indicator Code: Mandatory Advising
*Service Ind Reason Code: Undeclared Major Advising

Description: This hold prevents registering for classes. Please contact 801/581-8146 for more information.

Effect: Negative

Effective Period

Start Term: Begin Term End Term:
Start Date: End Date:

Assignment Details

*Department:

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.

The screenshot shows the PeopleSoft interface for Advisor Meetings. At the top, there are two tabs: 'Advisor Meetings' and 'View Advisor Notes'. Below the tabs, there is a 'Name:' field. To the right of this field, a red circle highlights a link labeled 'Guidelines for Notes'. Below the 'Name:' field, there is a section for 'Advisor Meeting:' with a dropdown menu, a 'Notes' button, and a table with columns for 'Advisor Name' and 'Date'. Below this section, there are three buttons: 'Save', 'Return to Search', and 'Notify'. At the bottom of the screenshot, there is a navigation bar with links for 'Advisor Meetings' and 'View Advisor Notes'.

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 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
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 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 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. Document information given regarding University and Department Policies. For example, "Student had questions about withdrawing from her math class. Provided form, deadline, and documentation requirements."
8. Advisors are expected to document referrals to other departments and campus If the referral is of a sensitive nature (for example, to the Center for Disability and Access or the Counseling Center), the advisor can write, "Student referred to appropriate department/ agency".
9. Academic advisors are legally required to report situations involving sexual misconduct and discrimination to the Office of Equal Opportunity/Affirmative Action either by email or through their online reporting system. These situations should be documented in the notes with a phrase such as, "Student discussed personal situation affecting their academic performance. I told them about campus resources for support, and I followed up with appropriate campus department."
10. If advisors observe student behaviors that raise concern, advisors should contact the Office of Dean of Students by either email or their online reporting system. These situations should be documented in the notes with a phrase such as, "Student disclosed disagreement with professor and displayed aggressive emotions and body language. I told them about campus resources for support, and I contacted the Office of Dean of Students."
11. Sensitive information should only be included in your notes when academically relevant or related to campus safety. For example, very personal information about a student, their health, family, 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.

REMEMBER: You can keep notes in a separate, personal file if there is something you need to remember, but do not want it included on the student's PeopleSoft 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.

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 /OrientFrsh/OrientTran/Petition**). Click "Save".
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.) For MAP Fresh and MAP 2nd Yr meeting types, mark the Learning Outcomes you covered.
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

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

2. Search for Student
Enter ID
Click Search

3. Select the appropriate appointment type from drop-down box.
Types include: 90+ Hour, Acad Stnd, General, Hon MAP 2, MAP 2nd Yr, MAP Fresh, MAP Undecl, OrientFrsh, OrientTran/Petition. Click "Save".

4. Click the "Notes" button

The screenshot shows the 'Advisor Meetings - SA1094' search panel with fields for ID, Campus ID, National ID, Last Name, and First Name. Below the search panel, the 'Advisor Meetings' table is visible, showing a meeting for 'GALLAGHER, RICHARD JOHN' with ID '00387026'. The 'Notes' button is highlighted in the table. A dropdown menu is open, showing meeting types: 90+ Hour, General, MAP 2nd Yr, MAP Fresh, MAP Undecl, OrientFrsh, OrientTran, and Petition. The 'Notes' button is also highlighted in the table.

PeopleSoft Advisor Notes: Recording and Viewing Advisor Notes

5. Type academically relevant notes in dialog box.

6. Click "OK"

4. SAVE the Record!

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.*