How-To-Guide
Advisor Center – Advisor Request

## Submitting an Advisor Request through Advisor Center

The **Advisor Request** functionality provides an online avenue for users to submit various approved requests on behalf of students. These requests may include course substitutions, requirement unit waivers and other request types that facilitate progress towards completion of graduation requirements on the Degree Progress Report (DPR). The requests are simply submitted through the Campus Solutions system and alleviate the process of submitting paper, fax or email attachments.

Request Types

Name	Function
Complementary Studies - Met	Request to indicate Complementary Studies is satisfied
Course Substn – Major or Minor	Substitute a course for a major or minor program requirement
Bulletin Year Change - MJR/MNR	Request to change bulletin year.
GE/Univ Req Pet – DUEAP Only	Substitute a course or waive units for a GE or university requirement
Waive Units (Overall) – MNR/MNR	Waive a number of units in the total units required for the major program
Waive Units – Course/Rqrmnt	Waive a number of units for a major requirement

Steps to Submit an Advisor Request

1. Navigate to the Advisor Center -- **Main Menu > Self Service > Advisor Center > Advisee Student Center**
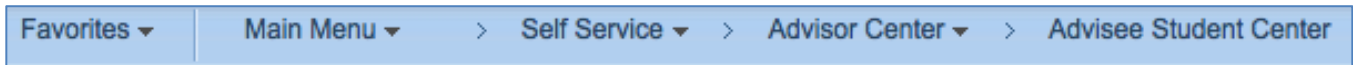
2. In the drop down menu, select Advisor Request

3. Click the Create New Request link

Undergrad	**Create New Request**

4. Click on the Request Type drop down menu and make your selection

Advising Request

Student		Advisor	
Career	Undergraduate	**Origination Date**	08/24/2023
Request Nbr.	1		

*Request Type [⌄]

Request Status

- Bulletin Year Change - MJR/MNR
- Complementary Studies - Met
- Course Substn - Major or Minor
- GE/Univ Req Pet - DUEAP Only
- Substn w/ Articulation Request
- Waive Units - Course/Rqrmnt
- **Waive Units Overall - MJR/MNR**

Requestor   Kay

Approver

Responder

5. Once you make a selection, a set of instructions and fields will appear. <u>Fill in the fields</u> according to the instructions.

Advising Request

Student	▮▮▮▮▮▮▮▮	▮▮▮▮▮▮
Career	Undergraduate	
Request Nbr.	1	Origination Date 08/24/2023

*Request Type [Course Substn - Major or Minor ▼]

To request a course substitution, please indicate the major requirement area, requirement and line number (found on DPR), course and term/year taken, institution and name of approver (optional) in the fields provided below. Comments are optional.

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Example:

Requirement Description:	Core Courses
Req Number / Line Number:	R11500 / L0010
Course Subject & Number:	LS 404
Term & Year Taken:	Fall 2022
Institution:	SFSU
Approver (Optional):	'Advisor name'
Comments (Optional):	(enter any additional pertinent information)

****

Requirement Description: [   ]

Req Number / Line Number: [   ]

Course Subject & Number: [   ]

Term & Year Taken: [   ]

Institution: [   ]

Approver (Optional): [   ]

Comments (Optional): [   ]

6. Scroll down to the drop-down menu on the Requestor line, <u>select the Submit</u> option and click OK.

Request Status

Requestor	████ [Submit ⌄]
Responder	████ [⌄]

Resolution Status   **Pending Until** [ ]

Student Notified?: ☐

History

[   ]

[OK]   [Cancel]   [Apply]

7. Once the request is submitted a status bar will appear. An option to edit the request is available by clicking the Edit link.

Edit request

Career	Nbr	Request Type	Descr	Requestor	Request Status	Approval Status	Responder Status	Edit
Undergrad	1	AR1	Course Substitution - Major	██████████	Submit		In Basket	Edit

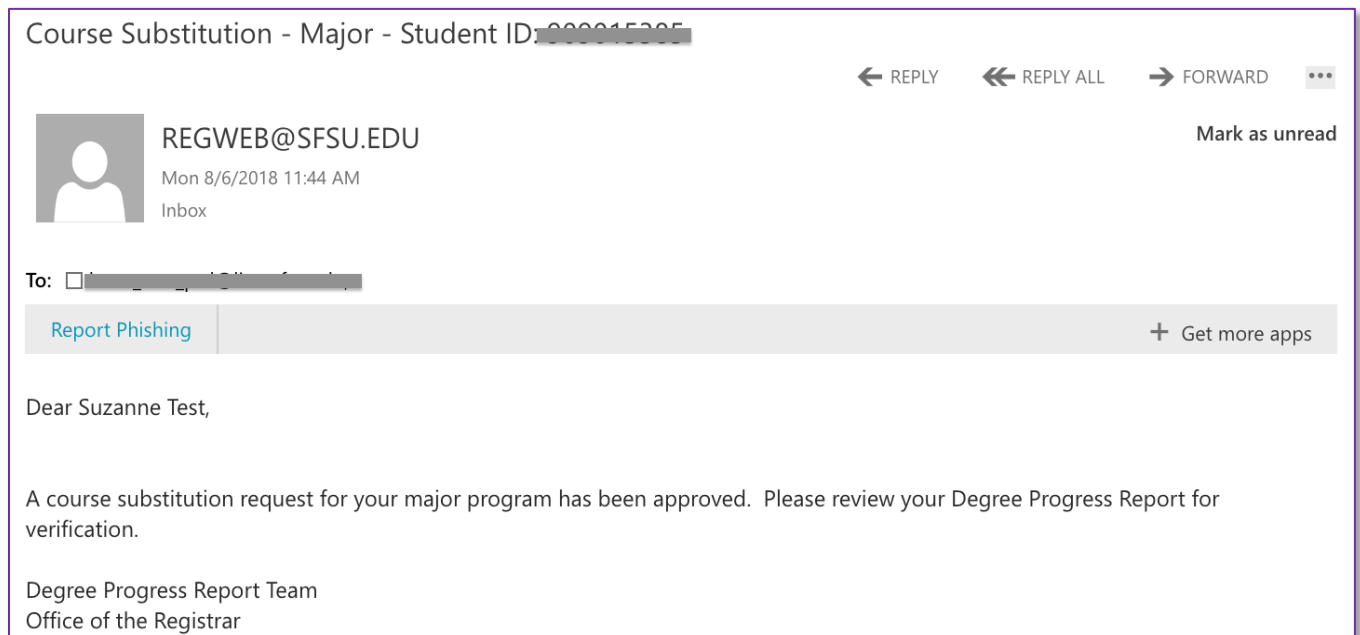8. If you need to edit the request click edit and enter comments in the comment box.

Comments

[|]

8. Once a request has been processed, a staff person will close the request in the system using one of these closed statuses: Closed-Done, Closed-Denied, Closed-Done with Modification, Closed-Withdrawn. After a final status is entered by the responder, the request will be in queue and included in the 'Batch Notification' process. The batch notification process is scheduled to run MWF at 8 am. The student will receive an email notification and the original requester will receive a blind carbon copy of the same email message. Below is an example of the generic message a student will receive when the request is completed. The responder can also include any specific or unique information in the message pertinent to the request.

Course Substitution - Major - Student ID:~~000015205~~

REPLY   REPLY ALL   FORWARD   ...

REGWEB@SFSU.EDU   Mark as unread
Mon 8/6/2018 11:44 AM
Inbox

To: ~~□~~

Report Phishing   + Get more apps

Dear Suzanne Test,

A course substitution request for your major program has been approved. Please review your Degree Progress Report for verification.

Degree Progress Report Team
Office of the Registrar

[Note: there are four types of 'closed' statuses that will generate email communication. Closed-Done as Requested, Closed-Denied, Closed-Done with Modification, Closed-Withdrawn. All of these statuses are setup with a standard email message indicating the final status of the request to the student and the original requestor. If a requestor would like a student to be notified that a request has been officially withdrawn, they can convey this to the responder in the comments section or reach out the responder outside of Advisor Request to mark the request as officially Closed-Withdrawn. Otherwise, if the requestor does not want the student notified, they can indicate to the responder to have the request sent back to them and they can mark the request as 'withdrawn' in the system. This will not notify the student.]

History Log

Once a request is entered in the system with a status, a history log is created that can be viewed within the specific request. The log will record when the request is submitted and completed. Once the student is notified by email a confirmation check box will also indicate they have been notified.

Open the student center account in Advisor Center and click on Advisor Request to review the status of requests. Select the desired request and scroll down to view history.

Requestor Status Type Definitions

Understanding Request Statuses and How to Use Them

- **Hold** – Use this status if you have begun a request and don't want to lose what you have entered or are not ready to submit it. This status will keep the request active and will not be submitted into the workflow. Once this status is selected, all information entered in the fields whether partial or not will be permanently saved and cannot be edited. A comments box will open up if you need to enter additional information to complete the request. If you made a mistake and would like to start over, select the Add Another button to re-enter information into the fields. Complete your request by using the submit status. **Note: Using the Add Another button does not create a new separate request but continues with the existing one that was started.**

- **In Basket** – This status is essentially the same as the **Hold** status. It is generally not recommended to use this status.

- **Submit** – This status submits the request entered and notifies the next person in the workflow that action is required.

- **Submit with Changes** – If a request is returned to the Requester for clarification or changes (**Needs Advisor Clarification**), it can then be resubmitted using **'Submitted with Changes'** to put it back in the workflow.

- **Withdraw** – After a request has been 'Submitted,' and a Responder returns it back to the Requestor, by responding with 'Needs Advisor Clarification', this status will become available if the Requestor needs to withdraw the request. *[Note: when a requestor marks a request as 'withdrawn' it will remain in the system with this status and <u>no notification will be sent</u> to the student and requestor.]*

Reviewing Advisor Request Status

At any time, you may search for requests you have submitted and review their status.

1. Navigate to Advisor Request Status – **Main Menu > CSU SA Baseline > CSU Academic Advising > Advisor Requests and Records > Advisor Request Status**
2. Enter your search parameter(s) and click Fetch.

Search Parameter Options

- **Advisee ID** – Select an ID to see all requests for a particular student. Leave blank to see all students.
- **Advisor** - Select an ID to see all requests initiated by particular Requester. Leave blank to see all Requesters.
- **Request Type** – Select a Request Type, or leave blank to see all request types.
- **Origin Date** – Select a date, or leave blank to see all.
- **Approver ID** – Select an ID to see all requests for a specific Approver, or leave blank for all.
- **Responder ID** – Select an ID to see all requests for a specific Approver or leave blank for all.
- **Request Status** – Select a status or leave blank for all.
- **Responder Status** – Select a status or leave blank for all.
- **Pending Until** – Select a date. The system will show all requests with a Pending Date up to and including the date selected. Leave blank for all.
- **Approval Status** – Select a status or leave blank for all.
- **Resolution Status** – Select a status or leave blank for all.

> This page is primarily used for searching for any requests and reviewing any detail currently logged in the system. If you need to make any additional updates to outstanding requests, please notate the student ID and navigate to Advisor Center, enter the student's ID, click on Advisor Request, locate the request, click Edit and complete your changes. (**See Submit with Changes on page 6**).

After entering criteria, your search results will appear. A link to the **History** log is also available.

Advisee ID	Name	Rqst Nbr.	Request	Advisor ID	Responder ID	Approver ID	Request Status	Approval Status	Responder Status	Resolution Status	
	Alexandra Wolfsberger	1	Articulation Rqst - All				Submit	Approved	In Basket		History
	Brian Aguilar Bastidas	1	Course Substitution - Major				Submit		CDoneR	Done	History

Use Cases

Complementary Studies

An advisor has determined the student has met Complementary Studies. This request can be used to indicate completion of this requirement. *[Note: While the specific rules for Complementary Studies are being built into the DPR for each BA major program, this request can be used during the transition period to indicate on the DPR this requirement has been met.]*

Course Substitution

An advisor is advising a student and notices a transfer course or another SFSU course can be used for a requirement in the major program. The advisor can select the Course Substitution option and enter relevant information in the provided fields. The comments box can also be used for additional information like waiving required units for the requirement if the substituted course is converted quarter to semester units.

Waive Units (Overall) – Major

A course substitution request has been submitted and approved however the substituted course is from a quarter school or an elective course from SFSU and is chosen to fill a requirement that may result in a deficiency towards overall units required for the major. Another example might be quarter unit courses automatically applying to the major, but result in deficient units for overall total units required for the major. This request can be used to waive a number of units. Example: 60 units are required, however the student's courses total 59 units. This request can be utilized to waive 1 unit of the total required for the major program.

Waive Units – Course/Rqrmnt

A course from a quarter school is applying to a requirement that may result in a deficiency of the specific requirement. Example: 3 units are required, however 2.68 units from a quarter school are applying. This request can be utilized to waive .32 units of the 3 units required.

Advisor Request Workflow Summary

Once the request is submitted by an advisor (requestor), a designated staff person (responder) will be notified of pending requests by email. If the request includes an additional approval step, the designated officer must approve the request before it is advanced to a responder and processed. Once the responder completes the required task, they will also close the request in the CS system. Both the requestor and student are notified by email after the notification process is run. The notification process will run automatically twice daily.

Advisor Request Workflow Diagram

1. Requestor submits request
2. Batch notification process runs
3. Responder and/or Approver notified of pending
4. Responder and/or Approver approves or processes request
5. Responder closes request in CS
6. Batch notification process runs
7. Requestor & student notified