

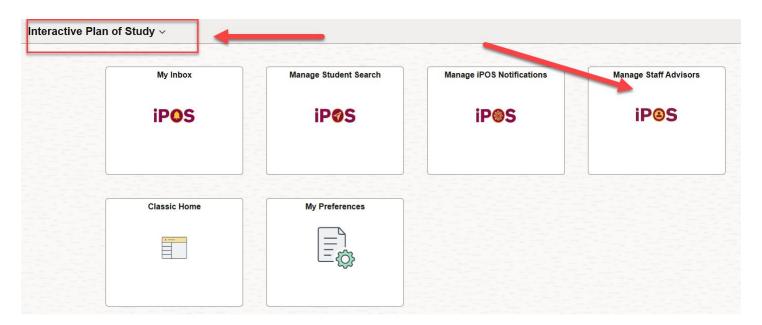
How-To Guide for Manage Staff Advisors

Introduction

The **Manage Staff Advisors** tile allows staff to create advising teams and assign individual advisors to specific students based on academic plan code. The assigned advisor(s) or advising team will appear on both the **Staff Advisor** and **Summary/Submit** pages within the iPOS. The advisor or advising team name(s) will also display on the student's **My ASU** page under **Academic Support Team**. Once advisors or advising teams have been assigned, the corresponding students will appear in the advisors' **iPOS Inbox**.

Updating Contact Information

1. Click on the Manage Staff Advisors tile on the iPOS homepage.



2. Click on Contact Information. Enter the Academic Plan code in the Acad Plan Field and click Enter.

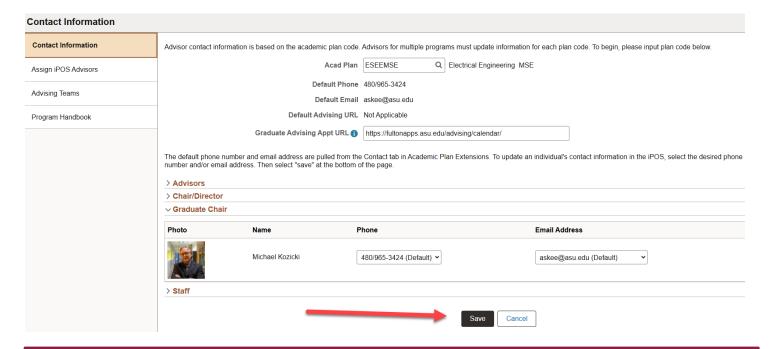


3. Program information as entered in **Academic Plan Extensions** will display, including the list of **Advisors**, **Chairs/Directors**, **Graduate Chairs**, and **Staff** and their contact details.

The unit's default phone number and email address can be updated on the **Contacts** tab in **Academic Plan Extensions**.

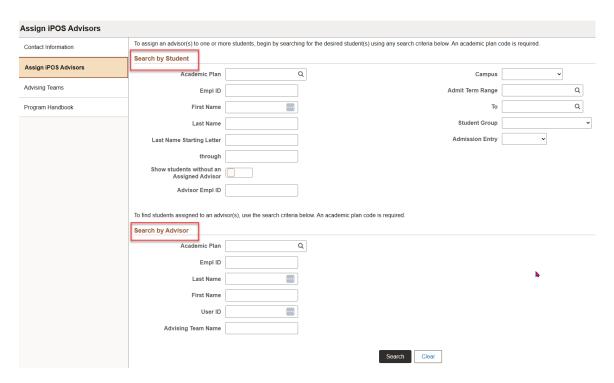
Programs update each individual's contact information using this page, including the desired phone number and/or email address. In addition, units can add a link to their online appointment scheduling tool, if desired, using the **Graduate Advising Appointment URL** displayed.

Once all updates have been made on this page, click Save at the bottom of the page.



Assigning iPOS Advisors

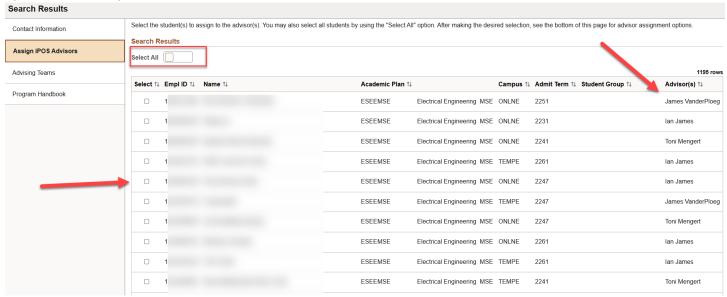
You can assign users to students within the same academic plan code using the **Assign iPOS Advisors** tab. On this page, you can search either by **student** or by **advisor/Advising Team**. An academic plan code is required for both search options.



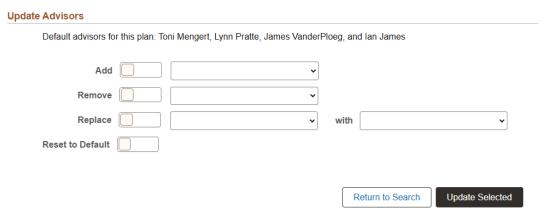
1. To search by student, enter the **academic plan code** along with any other search criteria, then click **Search**. To search by Advisor, enter the **academic plan code** and either the advisor's **10-digit ID** or their **last and first name**, then click **Search**. For an Advising Team, input the **Advising Team Name** and click **Search**.

The search results will display a list of students and their assigned advisor(s). If no advisor has been assigned, the **Advisor** column will show **Default**.

2. To select students, click **Select All** to choose all students in the search results, or check the individual boxes in the **Select** column. If you click **Select All**, the button will change to **Deselect All**. If you selected **Select All** by mistake, simply click **Deselect All** to undo the selection.



3. Scroll to the bottom of the page to view the four different options to choose from when assigning an advisor to a student(s).



Update Advisors

Add an Advisor: Use this option to assign advisors to selected students.

- 1. Click Add.
- 2. Select the advisor or advising team from the drop-down menu.
- 3. Click **Update Selected** to save your changes.

Note: The advisor list is populated from the **Contacts** tab in **Academic Plan Extensions**. Advising Teams are populated from the Advising Teams tab (none will display if they are not created/attached to the student's plan code)

Remove an Advisor: Use this option to remove an assigned advisor from selected students.

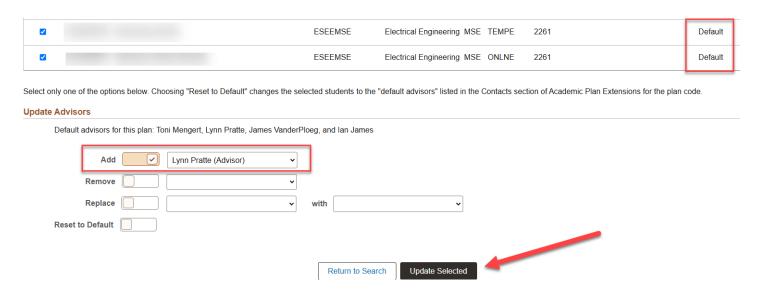
- 1. Click Remove.
- 2. Select the name of the advisor you wish to remove.
- 3. Click **Update Selected** to confirm the removal.

Replace an Advisor: Use this option to replace one advisor with another for selected students.

- 1. Click Replace.
- 2. Select the advisor you wish to replace.
- 3. Choose a new advisor from the drop-down menu.
- 4. Click **Update Selected** to apply the change.

Reset to Default: Use this option to reset the advisor assignment to the default setting.

- 1. Click **Reset** to return the advisor field to **Default** status.
- 2. Click **Update Selected** to apply the change.

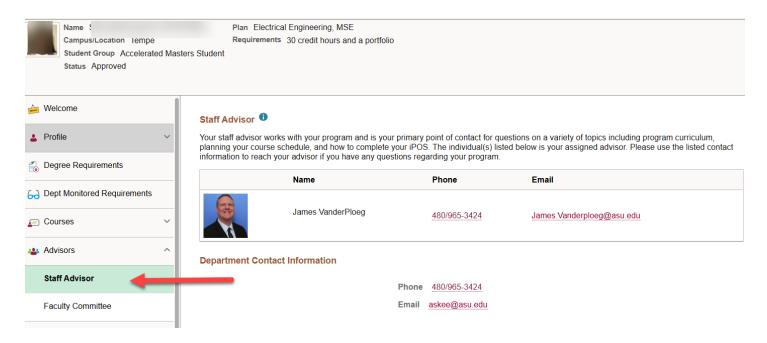


Staff Advisor/MyASU

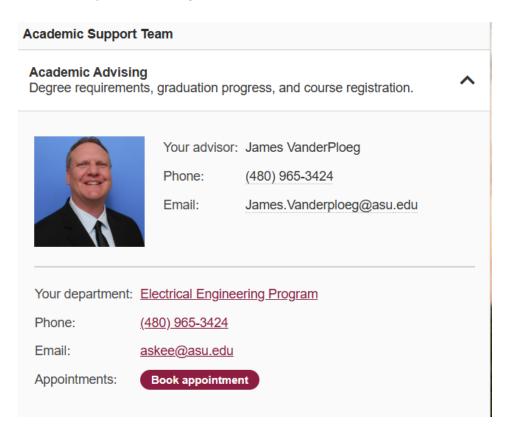
After assigning advisors, the updated information will appear on the **Staff Advisor** page in the iPOS, as well as on the student's **My ASU** page under **Academic Support Team**.

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iPOS Staff Advisor:



Student's My ASU showing Staff Advisor:

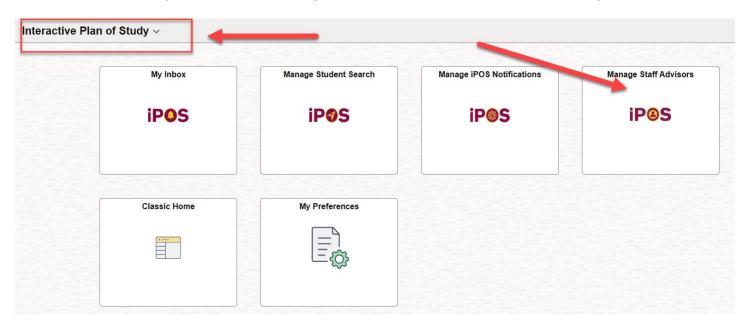


Advising Teams

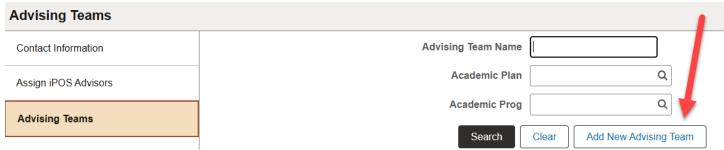
Some programs use **advising teams** instead of individual advisor assignments. Advising teams consist of two or more advisors who collaborate to support the students assigned to their team. Only users who have an approved Acad Unit POS Super User PeopleSoft security role can create advising teams.

Creating Advising Teams

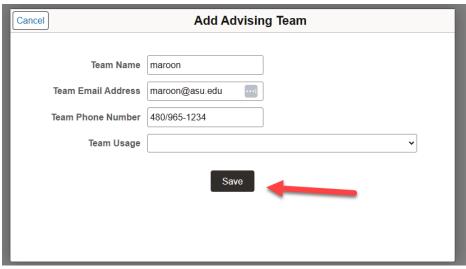
1. To create an advising team, click the **Manage Staff Advisors** tile on the iPOS homepage.



2. Click on **Advising Teams** and then **Add New Advising Team** (it will not display to those without the approved PeopleSoft role).



3. Enter the advising team information and select the team usage (if the team is to be used for Salesforce Graduate Advisor portal cases in addition to the iPOS). Then, click **Save**.



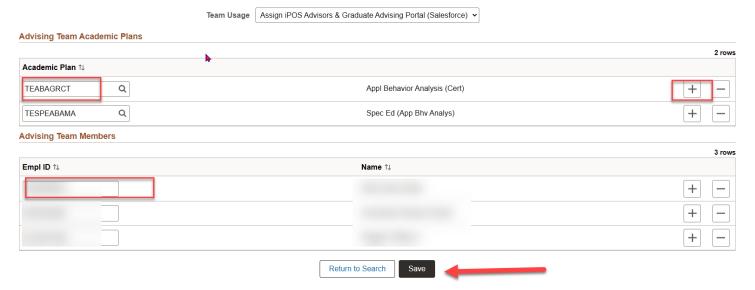
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4.. Enter the Advising Team Name and click Search. Then, select the team from the search results.



5. Enter the **plan code**. If more than one plan code is assigned to the team, click the **plus (+)** icon to add additional rows for each additional plan.

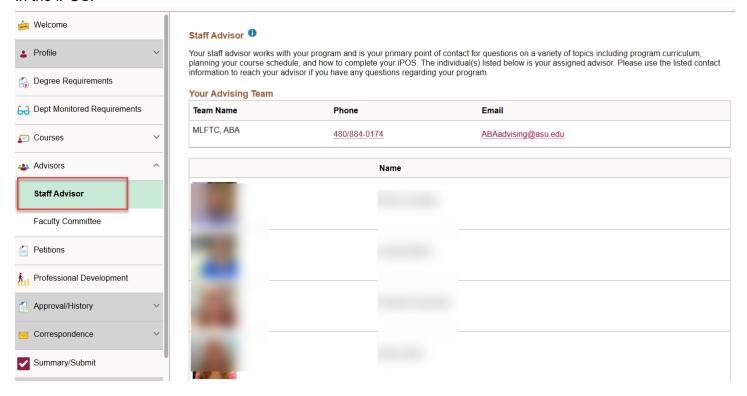
Next, enter the advisors' **EMPL ID** numbers to add them to the team. Click the **plus (+)** icon to add additional rows for each advisor. **Note:** all listed advisors must be included in **Academic Plan Extensions** and have **iPOS access** for every plan code associated with that advising team. Then, click **Save.**



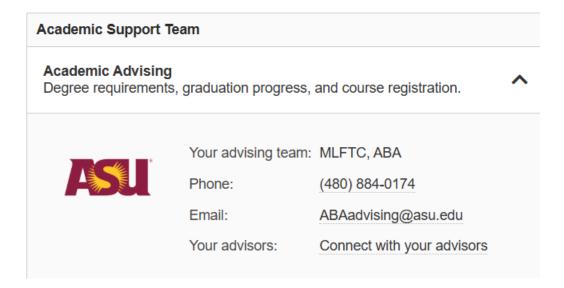
Assigning Students to Advising Teams

Follow the same process as **Assigning iPOS Advisors** above. Once changes are saved, the **Advising Team** content will be displayed on the iPOS and MyASU. All advisors on the team will be listed.

In the iPOS:



On the student's My ASU:



If you have any questions or feedback regarding this process, please contact your appropriate Graduate Support Coordinator.