

Checklist for Advisement Tracking

Navigation: Menu → Academic Advisement → Student Advisement → Request Advisement Report

☆ Prerequisite – have the NSHE ID of the Student you are Advising.

1.	From the main PeopleSoft menu, click the <u>Campus Community</u> link on the left hand navigation bar, then the <u>Checklists</u> link, then the <u>Person Checklists</u> , and then <u>Checklist Management-Person</u> .
	 ■ Campus Community ■ Personal Information (Student) ■ Checklists
	■ Person Checklists
	Checklist
	Management - Person
2.	Select the Add a New Value TAB. You should ALWAYS create a new advisement checklist.
	Request Advisement Report Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Value Add a New Value
	ID:
3.	Enter the Students NSHE ID.
	Checklist Management - Person
	Find an Existing Value Add a New Value
	ID:
4.	Click the Add button.
	Add
5.	FIRST thing to enter ALWAYS is Administrative Function and it is always GEN .
	*Administrative Function:

6.	Next enter the Checklist Code.
	*Checklist Code:
	This should correspond to your Center and begin with a V. You can use the magnifying glass and search by V to find you centers Code.
	• AS = ASC
	• BS = Business
	• ED = Education
	• EN = Engineering
	• FA = Fine Arts
	 HA = Hotel HN = Honors
	HS = Health Sciences
	LA = Liberal Arts
	• SC = Sciences
	UA = Urban Affairs
	VED for Education VBS for Business etc This naming convention will hold for Checklist Items.
7.	Nothing else on the first TAB needs to be entered. You may enter in the Comments box Comments about the advisement with the student. Nothing else should be touched.
8.	Click on the Checklist Management 2 TAB.
	Checklist Management 1 Checklist Management 2
	Checklist Management 2
	Devillerations
9.	Insert the Checklist Item code. This will follow the same naming convention above.
	*Item
	Q
	Make sure you use the same first 3 letters that match you Center. Because most Centers have many Checklist Items, use the magnifying glass and search by your Center. i.e. VHS=Health Sciences
	Administrative Function: GEN
	Checklist Item Code: begins with > vhs
	Description: begins with 🕏
10.	Click Look Up.
	Leabille
	Look Up
11.	To organize the Checklist Items their short description is prefaced by AT –Appointment Type, B or BN -Center tracking Items F -Forms, etc To sort the Items by Type click on the Short Description.
	Checklist Item Code Item Association Description Short Description
12.	Select the Item i.e VHSIA – Health Sciences Individual Advising.
13.	If you need to add more Items refer to the BPG which has more detailed instructions about adding Checklist Items .
14.	Click Save.
	Save
15.	End of Procedure