

Changing Advisor or an Engagement Channel for an Appointment in Student Success Hub

1 Search for the student using the Global Search bar to open their person account

The screenshot displays the 'Person Account' for 'Blaze Bronco' in the Student Success Hub. At the top, there are buttons for 'Edit', 'Log in to Experience as User', and 'View Customer User'. The University ID is 111606642. A prominent red warning message states: 'This student has requested PRIVACY. You may release no information about this student without their specific written permission.' Below this, a navigation bar includes 'Details', 'Schedule Appointments', 'Appointments', 'Advising Notes', 'Service Indicators', 'Related', and 'Files'. The 'Details' section is expanded to show 'Account Information' and 'Contact Information'. The 'Account Information' section includes fields for Account Name (Blaze Bronco), Legal First Name (Blaze), Legal Last Name (Bronco), Current Term, and Enrollment Status. The 'Contact Information' section includes Email (pmo-testing@boisestate.edu), University ID (111606642), Term Activated Student (checked), Phone (+1 2085151234), and Mobile (+1 2081234567). On the right side, there are several panels: 'Quick Actions' with a search bar and 'Create Advising Note' button; 'Advisee Case (1)' with a link to 'Blaze Bronco: Student Success Case'; 'Active Record Alerts (0)'; and 'Activity' with a 'Chatter' tab. The 'Activity' section shows 'Upcoming & Overdue' items, including a 'Student Follow Up' by Sage Rust, and a 'March • 2025' section with a virtual event by Nicole Lopez.

Person Account
Blaze Bronco
University ID
111606642

Edit Log in to Experience as User View Customer User

This student has requested **PRIVACY**. You may release no information about this student without their specific written permission.

Quick Actions
Search actions...
Create Advising Note His

Advisee Case (1)
Blaze Bronco: Student Success Case

Active Record Alerts (0)

Activity Chatter
Upcoming & Overdue
Student Follow Up
Sage Rust has an upcomin
March • 2025
Blaze Bronco: Virtual - Rex
Nicole Lopez had an event
Blaze Bronco: Virtual - Co

Details Schedule Appointments Appointments Advising Notes Service Indicators Related Files

Account Information

Account Name	Blaze Bronco	Reported Expected Graduation Term	Fall 2026
Legal First Name	Blaze	Academic Career	
Legal Last Name	Bronco	Class Standing	
Current Term		Status	Status
Enrollment Status			

Contact Information

Email	pmo-testing@boisestate.edu	Term Activated Student	<input checked="" type="checkbox"/>
University ID	111606642	Phone	+1 2085151234
		Mobile	+1 2081234567

Learner Programs (2)
2 items • Filtered by Status • Updated a minute ago

2 Click the Appointments tab

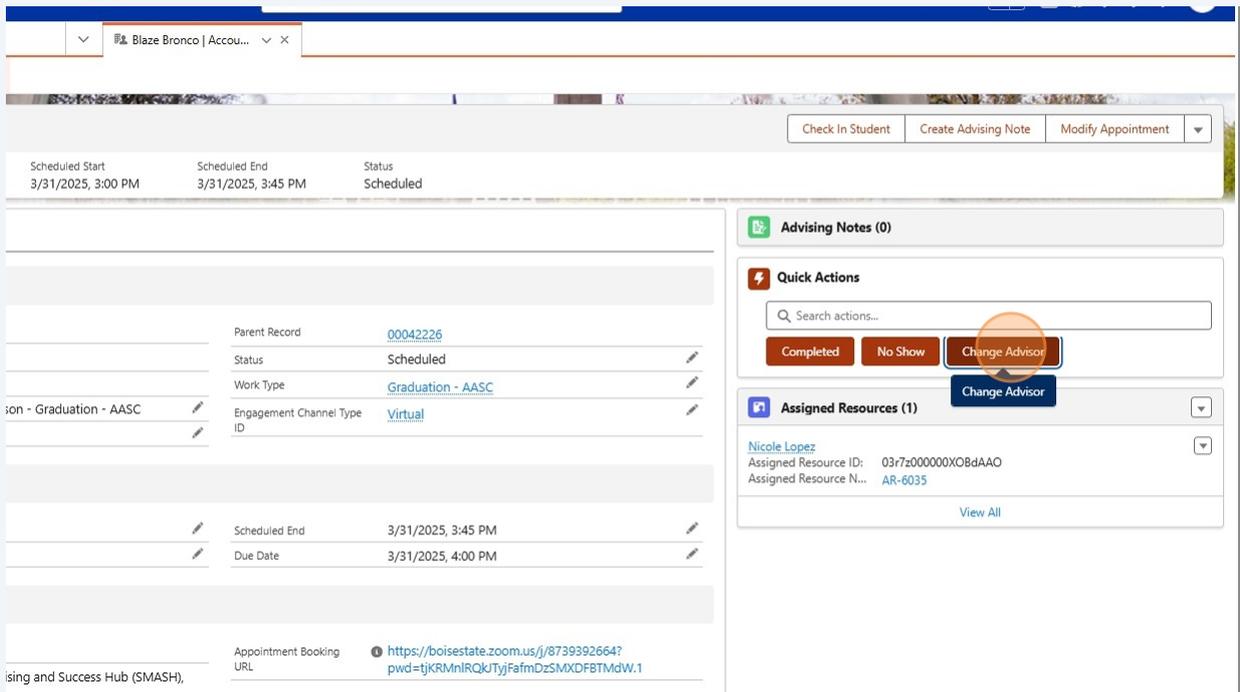
The screenshot shows the Blaze Bronco account page for a student with University ID 111606642. A red banner at the top states: "This student has requested PRIVACY. You may release no information about this student without their specific written permission." Below this, the 'Appointments' tab is highlighted with an orange circle. The page displays account information, contact information, and a sidebar with 'Quick Actions', 'Advisee Case (1)', and 'Active Record Alerts (0)'. The 'Appointments' tab is currently empty.

3 Click the appointment number link of the appointment you need to re-assign

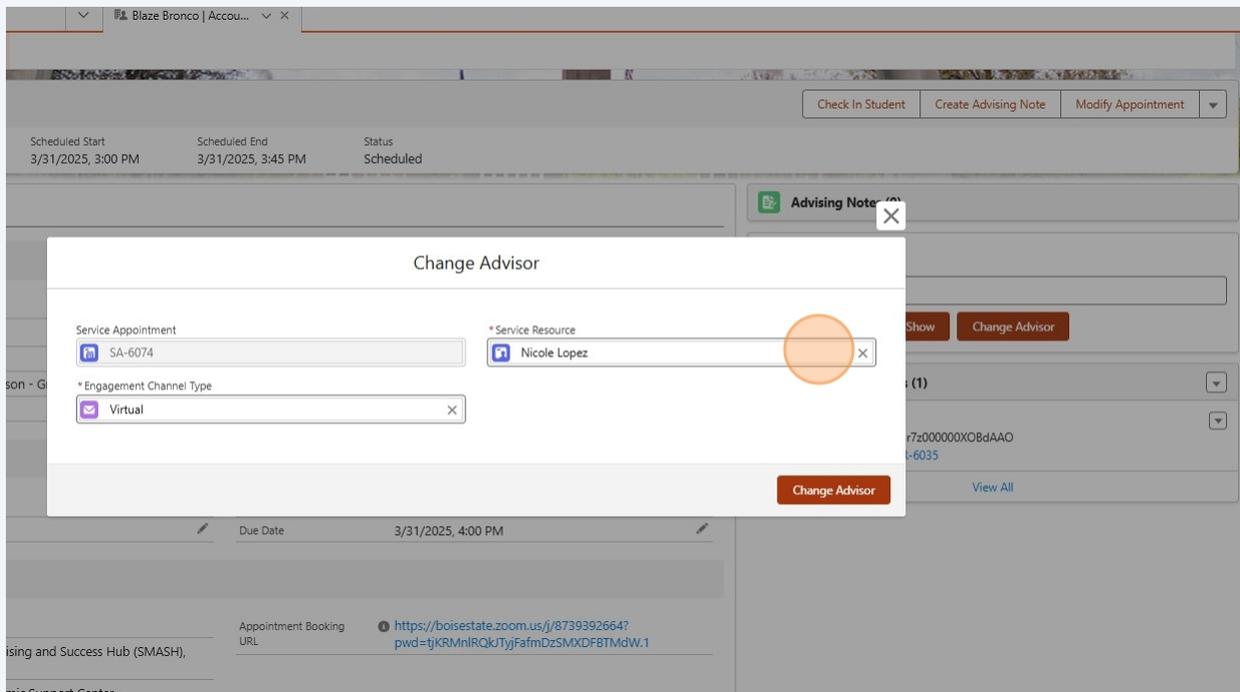
The screenshot shows the same Blaze Bronco account page, but now the 'Appointments' tab displays a list of 10 appointments. The first appointment, with ID SA-6074, is highlighted with an orange circle. The list includes columns for Appointment ID, Subject, Scheduled Start, Scheduled End, and Created Date.

Appointment ID	Subject	Scheduled Start	Scheduled End	Created Date
SA-6074	Blaze Bronco: In Person - Graduation - AASC	3/31/2025, 3:00 PM	3/31/2025, 3:45 PM	3/27/2025, 1:45 PM
SA-6075		3/30/2025, 9:00 AM	3/30/2025, 9:30 AM	3/27/2025, 1:45 PM
SA-6073	Blaze Bronco: Virtual - Required Advising (RAD) Blaze Bronco: Virt...	3/25/2025, 3:00 PM	3/25/2025, 3:30 PM	3/25/2025, 12:00 PM
SA-6072	Blaze Bronco: Virtual - Course Selection/Planning - COAS	3/20/2025, 2:00 PM	3/20/2025, 2:30 PM	3/19/2025, 1:45 PM
SA-6069		3/14/2025, 3:00 PM	3/14/2025, 3:45 PM	3/12/2025, 1:45 PM
SA-6067	test	3/8/2025, 3:45 PM	3/8/2025, 4:30 PM	3/7/2025, 3:00 PM
SA-6064	Blaze Bronco: Virtual - Academic Concern or Appeal	3/7/2025, 10:30 AM	3/7/2025, 11:00 AM	3/5/2025, 10:00 AM
SA-6058	Blaze Bronco: Virtual - Major Exploration or Major Change	2/27/2025, 9:00 AM	2/27/2025, 10:00 AM	2/18/2025, 10:00 AM
SA-6052	Blaze Bronco: Virtual - Course Selection/Planning	2/14/2025, 11:30 AM	2/14/2025, 12:15 PM	2/11/2025, 11:00 AM
SA-6057		2/12/2025, 3:15 PM	2/12/2025, 4:00 PM	2/11/2025, 12:00 PM

4 Click Change Advisor in the Quick Action Launcher on the right side

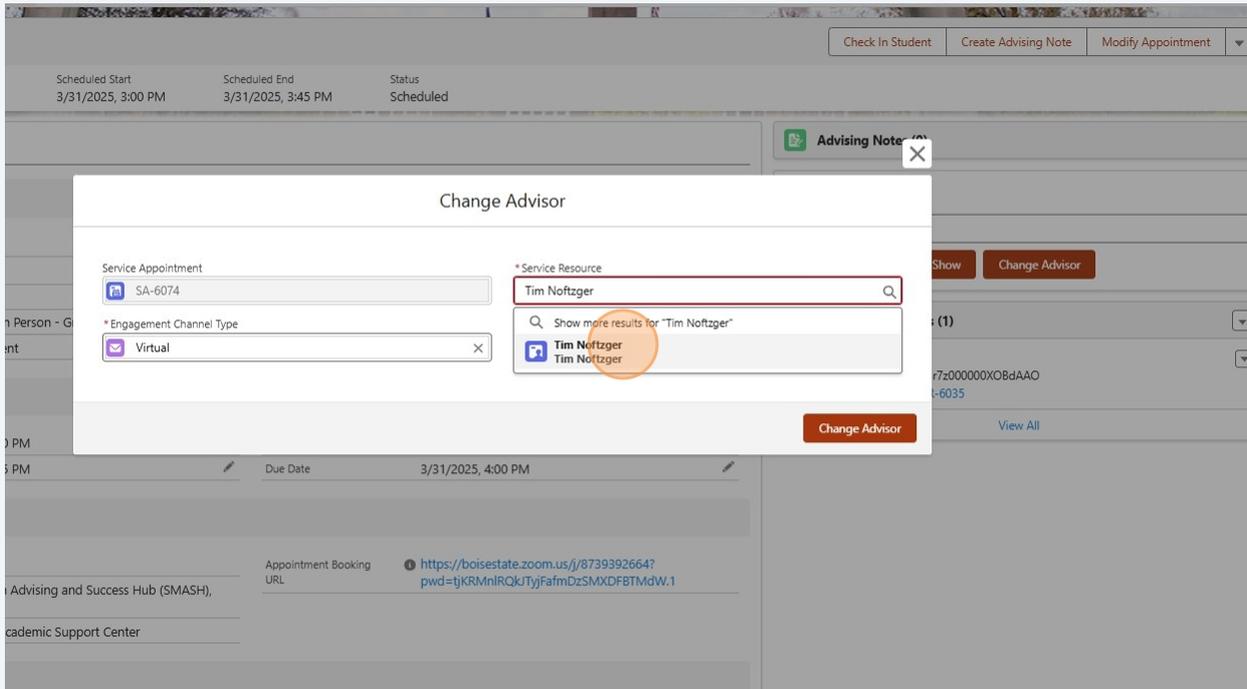


5 Click the x in Service Resource field to delete the assigned advisor



6

Type in the name of the advisor you need to assign to the appointment and click their name



7

If you need to change the Engagement Channel Type, click the x to delete the current channel

