# 9.2 Assigning a Student to an Advisor

**Purpose**: Use this document as a reference for assigning an advisor to an individual student in ctcLink.

**Audience**: Advisement Staff.

⚠ You must have at least one of these local college managed security roles:

- ZC SR Student Advisor
- ZD SR Student Advisor
- ZD SR Super User
- ZZ SR Student Advisor

  If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Advisors <u>must</u> be set up in the Instructor/Advisor table prior to being able to assign them to a student.

## Assign a Student to an Advisor

**Navigation: Menu > Records and Enrollment > Student Background Information > Student Advisor**

1. On the **Student Advisor** search page, input the student **ID** or **Name**.
2. Select **Search**.
3. On the **Student Advisor** page, enter information into the following fields:
   - **Academic Institution:** Input or Look Up
   - **Advisor Role:** Advisor
   - **Academic Career:** Input or Look Up
   - **Academic Program:** Input or Look Up
   - **Academic Plan:** Input or Look Up (optional)
   - **Academic Sub-Plan:** Input or Look Up (optional)
   - **Academic Advisor:** Input or Look Up

4. Select **Save**.

> ℹ️ Once the student is assigned, they will be viewable on the assigned Advisor's *My Advisees* list in the Advisor Center.
>
> If the program plan stack is *Complete* or *Discontinued*, the student will no longer appear on the Advisor's list.

**End of procedure.**

## Reassign a Student to Different Advisor

**Navigation:  Menu > Records and Enrollment > Student Background Information > Student Advisor**

1. On the **Student Advisor** search page, input the student **ID** or **Name**.
2. Select **Search**.
3. On the **Student Advisor** page, select the the **[+] plus icon** on the right side of the **Student Details s**ection to add a new row.
4. A new row has been added. Enter the following information:
   a. **Academic Institution:** Input or Look Up--Ensure that the correct institution is selected. Students can attend multiple institutions and have an advisor from each institution.
   b. **Effective Date:** The date the advisor becomes effective for the student.
      I. The **Effective Date** corresponds with the effective date on the student's Student Program Plan page. Advisor assignments are effective-dated, which means that only active advisor IDs and active student program/plan fields (career, program, and plan) can be selected at the time of assignment.
      II. For example, if a change (e.g. program change PRGC) to the student's program/plan was future effective dated to 09/21/2020, and you want to assign a new program advisor today 08/25/2020,  the new program would not be available for you to select from in the Academic Program field in the Student Academic Details section. This means that the advisor(s) would not display in the Student Service Center until 09/21/2020.

   c. **Advisor Role:** Advisor
   d. **Academic Career:** Input or Look Up
   e. **Academic Program:** Input or Look Up
   f. **Academic Plan:** Input or Look Up (optional)
   g. **Academic Sub-Plan:** Input or Look Up (optional)
   h. **Academic Advisor:** Replace existing advisor's ID with new advisor's ID

5. Select **Save**.

# Multiple Academic Advisors at the Same Institution

> ℹ️ Your college might have a situation when a student *already has* an advisor, and you want to *keep* that one but *add* an advisor. The below steps will walk you through adding a new advisor (*to a student who already has an advisor*), resulting in the student having two (*or more*) advisors at the same institution.

1. The first step will be to add a new **Effective Dated** row in the Student Details section by selecting the **[+] plus icon**. (Located on the right side of screen, under "View All".
2. To add more than one advisor to a student, select the **[+] plus icon** to the right of the **Student Academic Details** section.
3. A new row is added, and the following fields become available to enter information:
4. **Advisor Role:** Advisor
5. **Academic Career:** Input or Look Up
6. **Academic Program:** Input or Look Up
7. **Academic Plan:** Input or Look Up (optional)
8. **Academic Sub-Plan:** Input or Look Up (optional)
9. **Academic Advisor:** Input or Look Up
10. Select **Save**.



11. Select the lower **View All** link in the **Student Academic Details** section to display advisor records on the same page.

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# More Than One Advisor at Different Institutions

1. A student can attend more than one institution; therefore, it is important to select **View All** when viewing a student's advisor(s).



2. Both advisors can be viewed in the **Advisees Student Center.**
3. Select the **Details** link to view advisor information.
4. Advisor information displays.

**Process complete.**

# Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

⚠️ **VIDEO COMING SOON!!**

# Video Tutorial via Panopto

View the external link to Assigning a Student to an Advisor.  This link will open in a new tab/window.

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