

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 must 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**.

 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** section 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

i 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**.

The screenshot shows the 'Student Advisor' form for Kathrine Abrahamson (ID: 201492413). The 'Student Details' section is at the top, showing the academic institution as 'WA220' (Tacoma CC) and the effective date as '02/11/2021'. Below this is the 'Student Academic Details' section, which has a table with 3 rows. The first row is highlighted with a red box, showing the following details: Advisor Role: Advisor, Academic Career: UGRD, Academic Program: ACADM, Academic Plan: (empty), Academic Sub-Plan: (empty), Academic Advisor: 201221346, and Advisor Percentage: (empty). The 'Advisor Number' field is set to 3, and a red arrow points to it. The 'View All' link is visible in the top right corner of the 'Student Academic Details' section. At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

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

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).

The screenshot displays the 'Student Advisor' interface for student Keegan Young (ID: 201491925). It shows two advisor records, each with a red box highlighting the institution and effective date fields.

Advisor 1:

- *Academic Institution: WA030 (Olympic College)
- *Effective Date: 04/02/2020
- *Advisor Role: Advisor
- *Advisor Number: 1
- *Academic Career: UGRD (Undergraduate)
- *Academic Program: PRFTC (Professional Technical)
- Academic Plan: CSTISAAS (CIS Info Sys Specialist AAST)
- Academic Sub-Plan: (empty)
- Academic Advisor: 201386905 (Nidless, Francis)
- Advisor Percentage: (empty)
- Committee: (empty)
- Options: ☐ Advised by Committee, ☐ Must Approve Enrollment, ☐ Must Approve Graduation, ☐ Graduation Approved

Advisor 2:

- *Academic Institution: WA220 (Tacoma CC)
- *Effective Date: 03/04/2020
- *Advisor Role: Advisor
- *Advisor Number: 1
- *Academic Career: UGRD (Undergraduate)
- *Academic Program: ACADM (Academic)

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

The screenshot shows the 'Advisor Center' interface. On the left is a navigation menu with options: My Advisees, Student Center, General Info, Advise Transfer Credit, Academics, and Search. The main content area is titled 'Charley Burns Advisee Student Center' and 'Keegan Young'. It includes a 'Change Advisee' dropdown menu set to 'Young, Keegan' with a 'Change' button. Below this is the 'Student Message Center' with a 'Message Center' link. The 'Academics' section shows links for 'My Class Schedule', 'Shopping Cart', and 'My Planner', along with a dropdown menu for 'other academic...'. The 'Personal Information' section has links for 'Demographic Data' and 'Emergency Contact'. A 'Contact Information' table is displayed, showing Home Address (6088 Lake Pitt, Tacoma, WA 98409-2233, Pierce), Mailing Address (None), Mobile Phone (None), and Home E-mail (201491925.HOME@test.com). On the right, there are sections for 'No Holds', 'To Do List' (No To Do's), 'Milestones' (No Milestones), and 'Enrollment Dates' (Enrollment Appointment for FALL 2020 Regular Academic Session on June 5, 2020). The 'Advisor' section, highlighted with a red box, shows 'Program Advisor' as Francis Nidless and Charley Burns, with a 'Details' link.

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.