Manage Advisor Assignment on Student Cohorts

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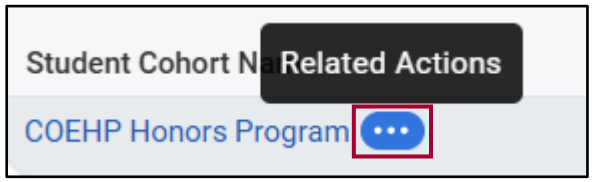
This quick reference guide (QRG) provides instructions on how to add, remove, or change an academic advisor for a student in Workday. Updating advisor assignments ensures students can contact the correct advisor and stay connected to the resources and support they need. It is recommended for this to be a standard process performed regularly throughout the academic year.

To add, remove, or change an academic advisor on a record or cohort, complete the following steps.

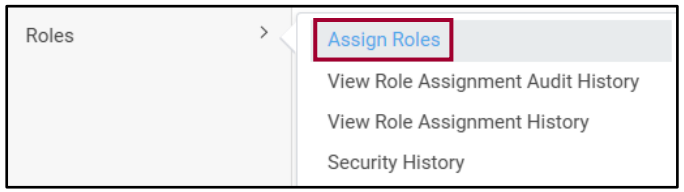
Add Advisor to Student Cohort

From the Workday Home page:

1. Type and select **Find Student Cohort** in the search bar.
2. (Optional) Fill in report fields to specify the desired output.
3. Click **OK.**
4. Click the **Related Actions** button beside your desired student cohort.



5. Hover over **Roles** and select **Assign Roles.**



6. Choose the **Effective Date.**
7. Click **OK.**
8. Select the appropriate **Role** from the dropdown list.
9. Select the appropriate advisor from the **Assigned To** dropdown list.

Note: You can assign multiple roles to a student cohort by clicking the Add Row button and repeating steps 8 and 9.

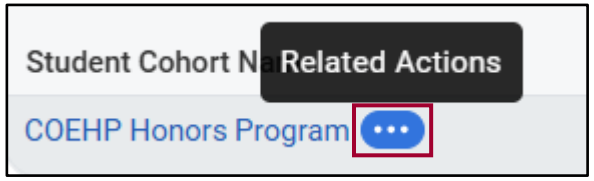
10. Click **OK.**
11. Click **Done.**

Note: Once an academic advisor is added to a student's record or assigned to a student's cohort, the advisor will show in the student's **Important Contacts** in their **Academics Hub.**

Remove and/or Change Advisor on a Cohort

From the Workday Home page:

1. Type and select **Find Student Cohort** in the search bar.
2. (Optional) Fill in report fields to specify the desired output.
3. Click **OK.**
4. Click the **Related Actions** button beside your desired student cohort.



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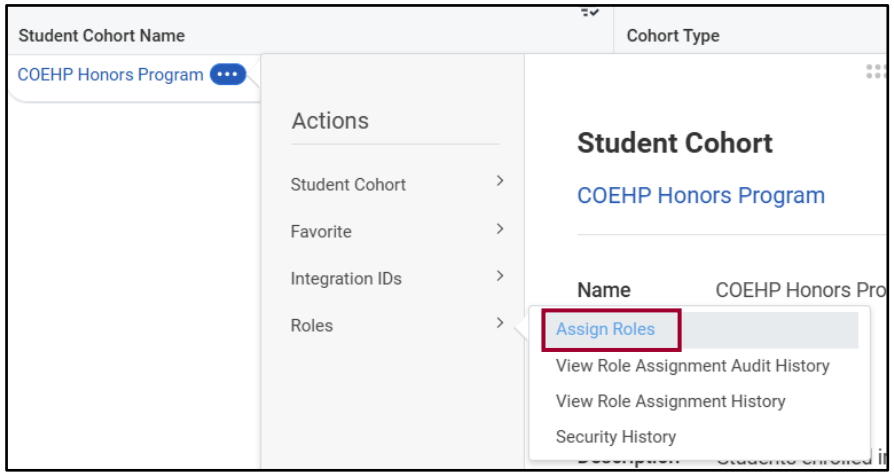
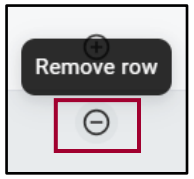
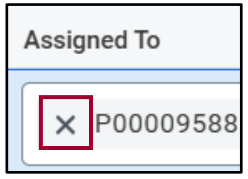
5. Hover over **Roles** and select **Assign Roles.**



6. Choose the **Effective Date.**
7. Click **OK.**
8. If you wish to remove the advisor Role from the cohort, click the **Remove Row (-)** button. If you would like to change the advisor, click the **X icon** beside the current advisor's name, then select the new advisor from the dropdown list.





9. Click **OK.**
10. Click **Done.**

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