



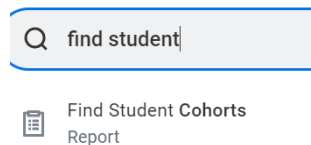
# View, Add and Remove Student from Cohort

## Overview

This quick reference guide provides an overview of how to view *Student Cohorts* and lists of students who belong to each cohort in addition to adding and removing students from a cohort. Note: Access to these tasks may vary.

### View Cohorts Process

1. Begin by searching for the **Find Student Cohorts** report in the main **Search Bar**.



2. On the Find Students Cohort Screen, you can use the criteria boxes to search for your cohort.
  - **Cohort Name:** Use this field if you know the exact name of the cohort you are searching for.
  - **Student Cohort Collections:** Browse cohorts grouped together by area or department.
  - **Academic Unit:** Find cohorts belonging to specific programs.
  - **Academic Level:** Choose from Continuing Education, Professional, Graduate, and Undergraduate.

- **Cohort Type:** Find cohort by type.

3. Click **OK when** you have selected your search criteria. You can also leave the fields blank to view all cohorts.
4. On the **Find Student Cohorts** report, you will be able to view cohorts based off of your previous search criteria. You can sort the report by any of the headers, including:
  - Cohort Name
  - Cohort Type
  - Student Cohort Collections
  - Academic Unit
  - Academic Level
  - Number of Members

**NOTE:** All *Undergraduate Advising Cohorts*, start with UGRD and end with the name of the Advisor.

**Find Student Cohorts** 🔍 📄

Academic Level Undergraduate

370 Items 🔍 📄 📄 📄 📄

Student Cohort Name	Cohort Type	Student Cohort Collections	Academic Unit	Academic Level	Number of Members	Updates Automatically
Transfer Students w/credit for CTWT only	Transfer Students		Santa Clara University	Undergraduate	99	
UGRD Accounting: Christopher B Paisley	UGRD Accounting Faculty Advising	UGRD Accounting Faculty Advising Cohort Collection Undergraduate Faculty Advising Cohort Collection	Accounting Department	Undergraduate	19	
UGRD Accounting: Ke Li	UGRD Accounting Faculty	UGRD Accounting Faculty	Accounting Department	Undergraduate	43	

- Once you locate the cohort you would like to view, click on the name. You will see general information about the cohort on the *View Student Cohort* page. Scroll down to view the list of students who belong to the cohort.
- Click on the **Academic Record** link to view their **Student Profile**.
- To export your advisee list into Excel, click the **Export to Excel** button at the top right corner of the list.

**NOTE:** To open this profile in a separate tab, right-click the link and click **See in New Tab**.

**UGRD Art and Art History: Blake DeMaria** 🔍

Academic Unit [Art and Art History Department](#)

Academic Level Undergraduate

Cohort Type [UGRD Art and Art History Faculty Advising](#)

Collections [UGRD Art and Art History Faculty Advising Cohort Collection](#)  
[Undergraduate Faculty Advising Cohort Collection](#)

Description

Evaluate Security by Cohort No

**Active Students in Cohort** 🔍 📄 📄 📄 📄

Future Cohort Membership Assignments Support Roles Applicants in Cohort

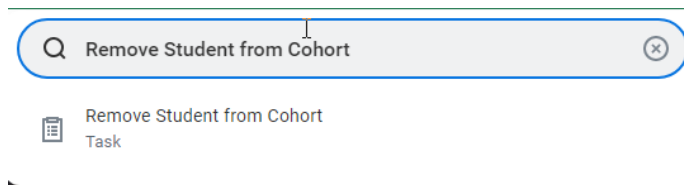
2 Items 🔍 📄 📄 📄 📄

Photo	Academic Record	Date Added	Added By
	<a href="#">Communication Department/Undergraduate (BA) - 03/25/2022 - Active</a>	10/12/2022 12:00:00 AM GMT-08:00 Pacific Time (Los Angeles)	mdunton-impl / Mardis Dunton
	<a href="#">Marketing Department/Undergraduate (BA/BSC) - 09/14/2020 - Active</a>	10/04/2021 12:00:00 AM GMT-08:00 Pacific Time (Los Angeles)	mdunton-impl / Mardis Dunton

### Remove Cohort Process

There are 2 ways to remove a cohort from a student's record.

- Use the task "Remove Student from Cohort" by typing it in the search menu.



2. Enter the student's name or ID number, select the Student Cohort you want to remove and select "As of Now" if you want to use today's date or By a Specific Date to change the date. Then click OK.

### Remove Student from Cohort

---

Student \*

Student Cohort \*

Select Remove Date \*  As of Now  By a Specific Date

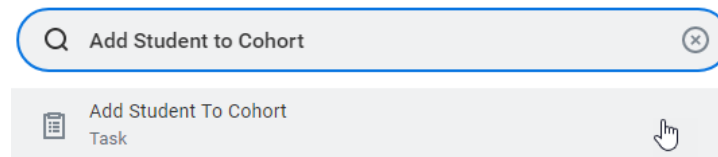
---

3. Another way to remove a cohort is from the student's academic profile. From the profile, click on the Actions button below the student's name and navigate to Student Cohort and then Remove Academic Record from Cohort (note: this task shows based on security access).

## Add Cohort Process

There are 2 ways to add a cohort from a student's record.

1. Use the task "Add Student from Cohort" by typing it in the search menu.



2. Enter the student's name or ID number, select the Student Cohort you want to add and select "As of Now" if you want to use today's date or By a Specific Date to change the date. Then click OK.

### Add Student To Cohort

---

Student \*

Student Cohort \*

Select Add Date \*  As of Now  By a Specific Date

---

3. Another way to add a cohort is from the student's academic profile. From the profile, click on the Actions button below the student's name

and navigate to Student Cohort and then Add Academic Record from Cohort.

