Student Success Collaborative™

EAB Campus

Advisor Training Guide

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Searching for a Student

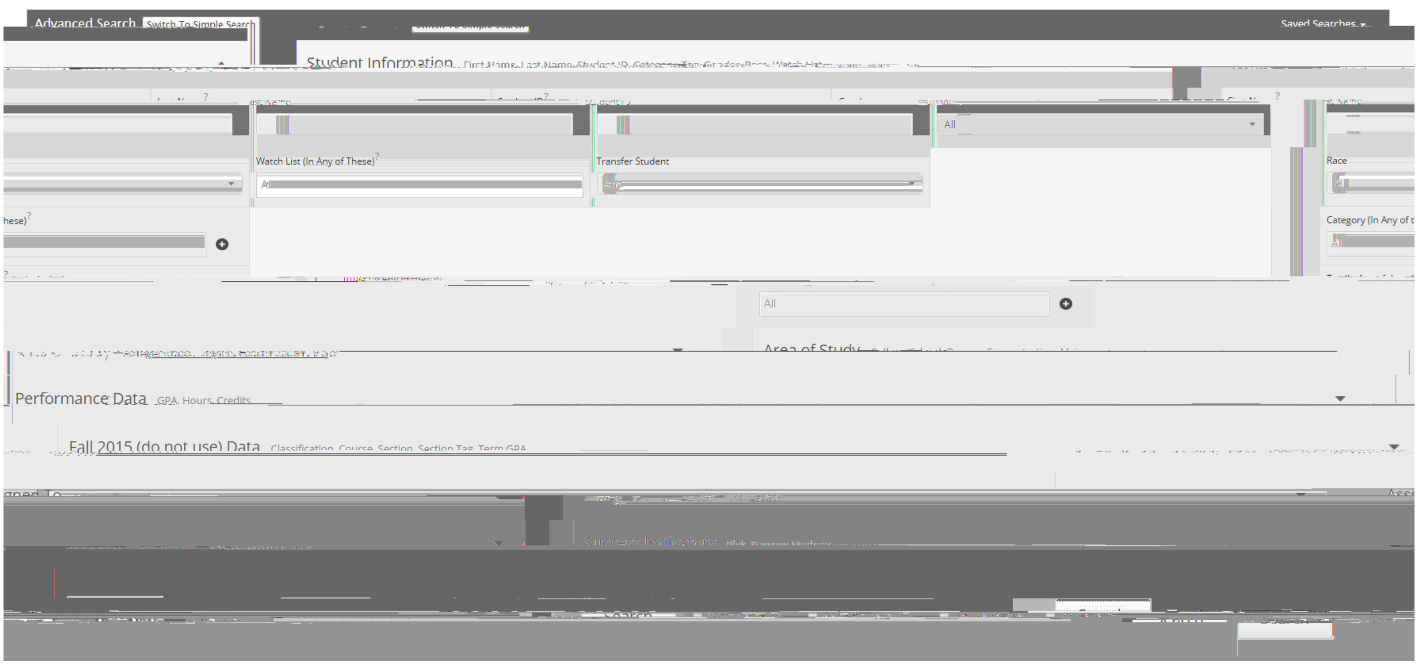
Quick Search

Search for a student or user in the Quick Search in the top right corner of the platform. Able to search by first name, last name, or student ID.

Advanced Search

Search for a specific group of users (e.g. students, professors, advisors) and then optionally perform some action for them. For instance, it is possible to get a list of all Men’s Baseball players with less than a 2.0 cumulative GPA and send them an email.

You can toggle between the Advanced and Simple search by clicking the Switch To... button under the Search for Students heading. When you first click on the Search tab, SSC defaults to the Simple Search. With the simple search, you only have the option to search by Keyword. This search will only allow you to search a specific character (or group of characters in the users name), classification and/or category. The Advanced Search, as shown above, gives users a chance to search for a wide variety of other options such as First Name, Last Name, Cum. GPA less than, and many more. Once you have entered your search criteria, click the Search button.



Additional Filters

1. My Students Only - Search only students assigned to you. Advisor assignments can be direct, one-to-one assignments or indirect major or category assignments. Tutors most commonly have direct, one-to-one student assignments. Students are assigned to professors based on their course rosters.

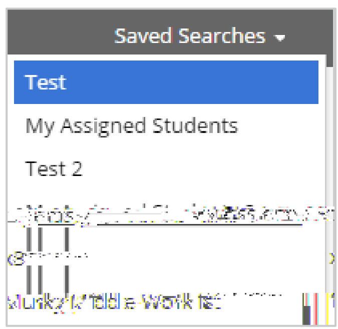
2. **At-Risk Students Only** - Limit search results to students who have the At-Risk indicator on their student record.

3. **Include Inactive** - By default, the search results only display users who are active in the currently selected term. Checking this box includes students from past terms as well.

Worklist Creation

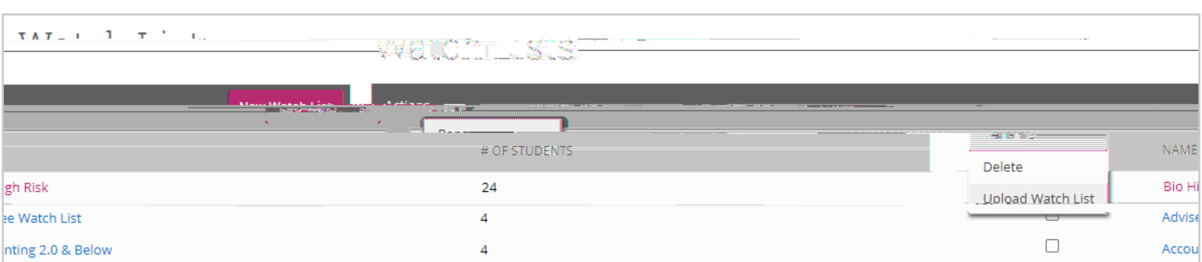
Saved Search: To save a worklist, click the save button in the upper left hand corner of the page and you will be prompted to save your worklist. This will create a dynamic list of results that consistently matches your search criteria.

All saved searches can be accessed through the Saved Searches drop down on the upper right hand side of the Advanced Search page. You can also see the results of your Saved Searches on the Advisor Home by switching from Assigned Students to a specific Saved Search or by navigating to the Lists & Searches icon under the Search icon.



Watch List: The alternative to a Saved Search is to create a Watch List, which is a static list of students. If instead of having a list of students that meet certain criteria, you want a list of the same group of students to keep track of then create a Watch List. From the search results, select the students by the box beside their name and then select Watch from the Actions dropdown. Students can either be added to an existing Watch List or a new one can be created.

Upload a Watch List: If you are not building your watch list from search results then navigate to the Lists & Searches icon. In the Actions dropdown under Watch Lists is the option to upload a watch list from an external spreadsheet. There are step by step directions for the upload process once chosen.



Setting Up Your Availability

Step 6: Click the Save button.

Repeat this process until all of your availabilities have been defined.

Note: You can have as much availability as needed.

There are two other options when adding Times Available.

Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied and a dialog will open allowing you to make edits or to save your newly created availability.

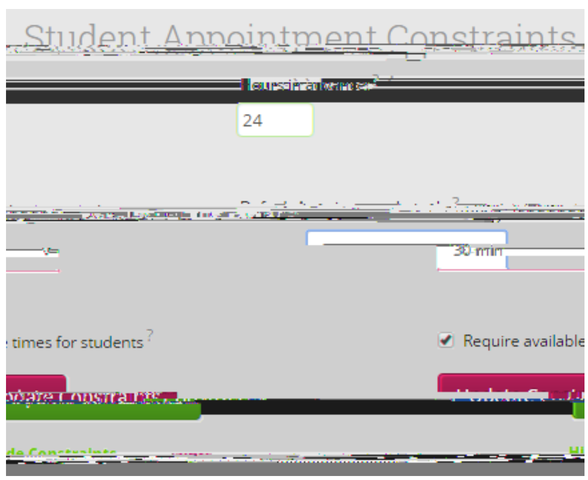
Delete Time- to delete your time, simply select the time and click the Delete Time button.

Note: Inactive availabilities are highlighted in red in the Times Available grid.

Appointment Constraints

To define parameters that control your availability with appointments, first click the Edit Appointment Constraints option.

When clicked, these options are available for you to define:



Hours in Advance refers to how many hours, from the current time, a student must wait before they can schedule an appointment. For instance in the example above, if the current time is 10:00am, the earliest a student would be able to schedule an appointment with you would be 2:00pm. This setting only applies to students making appointments.

Default Appointment Length is the default length of this specific advisor's appointment. This can be overridden by users with the appointment create permission, except by students, during appointment creation.

Require available times for students means that advisors must have defined Times Available before a student can create an appointment with them. If this box is checked, students are able to schedule with that advisor at any time and day. This box is checked by default. We highly recommend that advisors use this default.

Click the Update Constraints button to save your changes. Then, to hide the Student Appointment Constraints settings box you can simply click on the Hide Constraints link.

SSC Campus Calendar

My Calendar

Your calendar in SSC is a quick way to view appointments or events at a glance.

Add Calendar Event – Clicking Add Calendar Event will bring up your appointment scheduling page.

Print Calendar – Here you can print your monthly or weekly calendar views directly to PDF.

View today, day, week or month – Quickly choose to view just Today, or view by day, week or month. Using the left or right arrows allows you to view previous or future dates if desired.

Notice the Legend just above the calendar grid. Options listed include: Advising, Assignment, Tutoring, General, Course, Free Busy and Cancelled. Selecting one of the checkboxes enables associated appointments to show on the calendar grid and deselecting the checkbox hides them. (These options are automatically checked by default).

Viewing the Calendar Details

A user is able to hover over the calendar detail for a pop-up with more information and can click into the

Scheduling an Appointment

Appointment Scheduling

Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under “Add Advisors to Campaign”. If applicable, select other advisors to join your campaign.

Compose Your Message:

- Create a Subject Line for your email
- In the next box, edit the text for the email. Default is “Please schedule your advising appointment”. NOTE: Always be sure to keep the Schedule Link in your email body, if that is removed students will be unable to schedule appointments.
- In the instructions and notes box, add any details about the appointment that you would like to display on the scheduling landing page. For example, “This is a registration appointment to ensure you register for Fall 2016 classes. Please bring a list of courses you are interested in.”
-

Filing an Ad-Hoc Summary Report

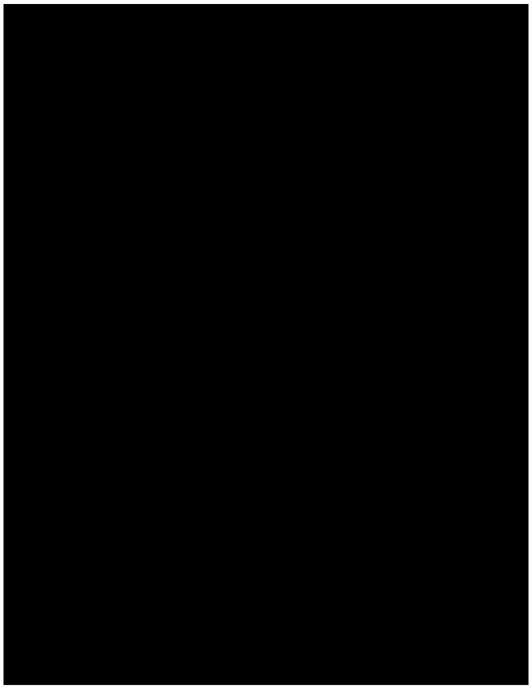
If an interaction with a student occurs outside of a scheduled appointment, then an ad-hoc summary report can be filed to record the discussion. Rather than adding the report from the Upcoming Appointments tab on the Advisor or Tutor Home, the report can be added either directly on the student's profile or by searching for the student and adding the report from the Actions dropdown in the Search.

Student Profile:

Messaging

Students

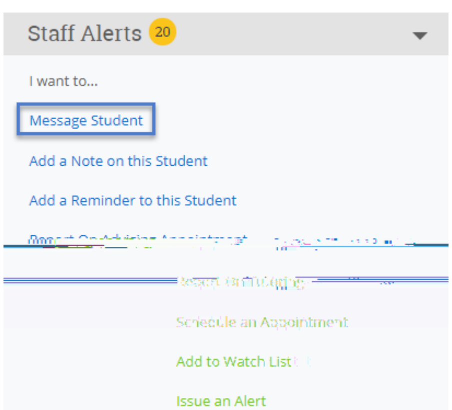
Depending on your permissions as a user of the Campus platform, you may have the ability to message students via email and/or text.



Home: From any Home screen with either students assigned or students enrolled in a course, messages can be issued by selecting the box beside the student's name(s) and choosing the Send Message option from the Actions dropdown. When using this method the student's name and therefore institution-specific email address will be auto-filled in the dialogue box.

Search Results: If you choose to search for the student in the Advanced Search then you can select the box beside the student's name(s) and navigate to the Actions dropdown. From the list of Actions, choose Send Message.

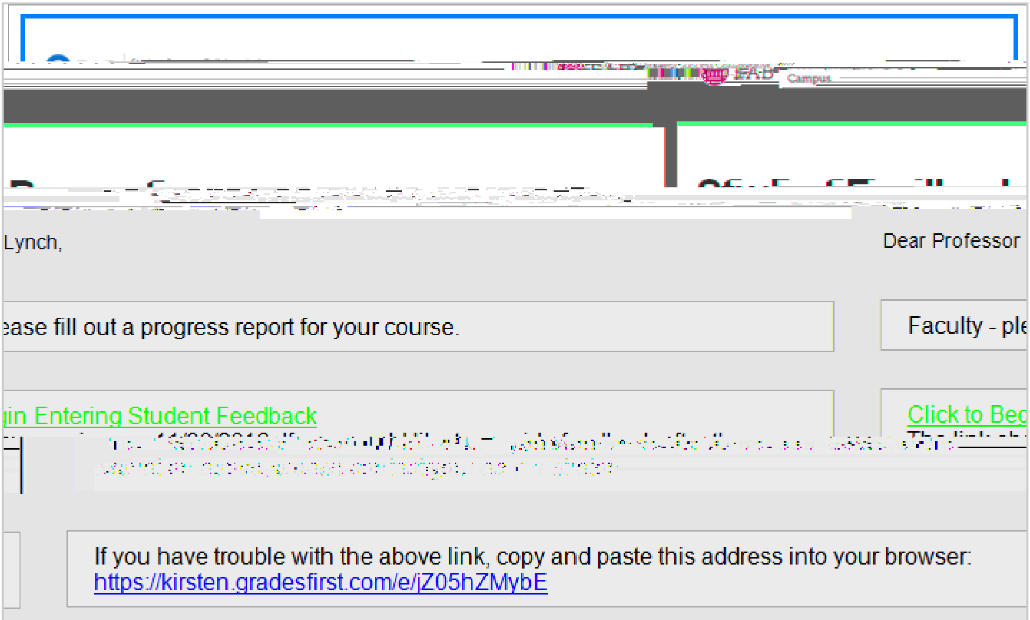
Student's Profile: Use the Quick Search to find the student with whom you met. Once on the student's profile, navigate to the right hand menu. In the "I Want To…" actions section there will be an option to Send a Message.



Progress Reports

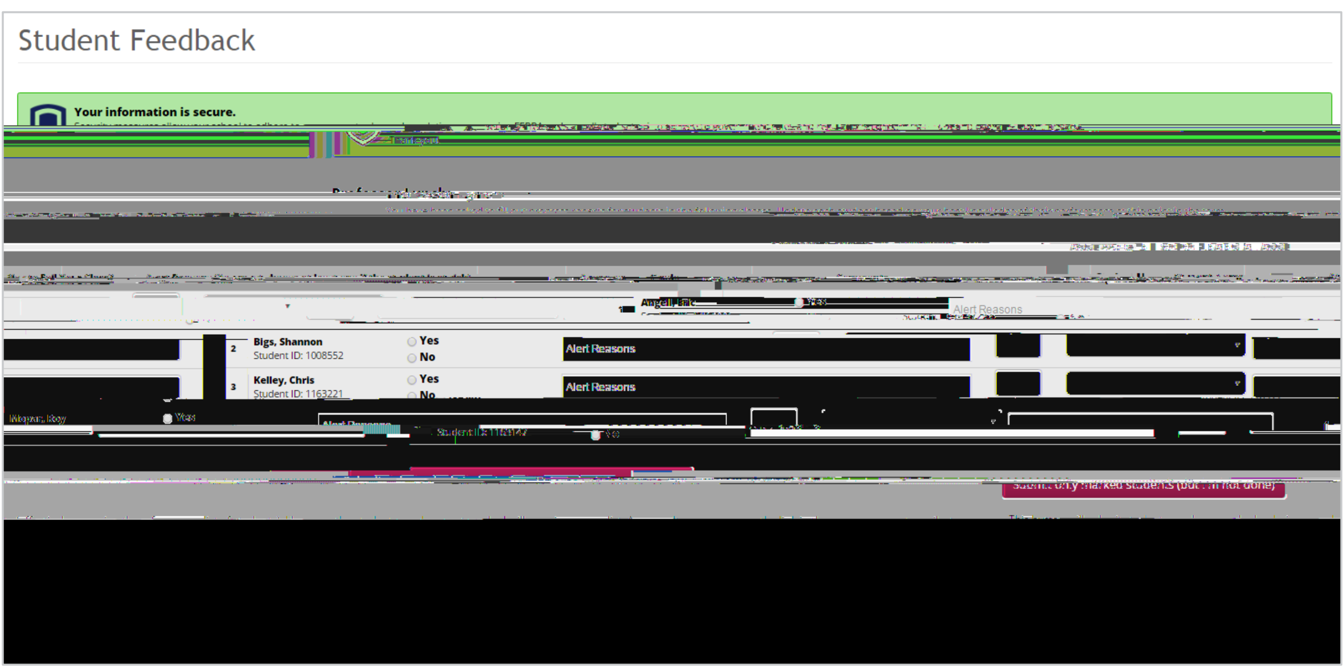
Responding to a Progress Report Campaign

As a faculty member you will receive an email during the semester prompting you to provide feedback on students in your courses. The email will be similar to the below:



By clicking on the link within this email you will be taken to a web page that displays the courses you teach and the class roster for those courses. You will be asked to report on whether the students are at risk to fail your course and why; you are able to provide as many reasons as apply. You are then able to provide optional information on the absences and grades of the student as well as share any additional context.

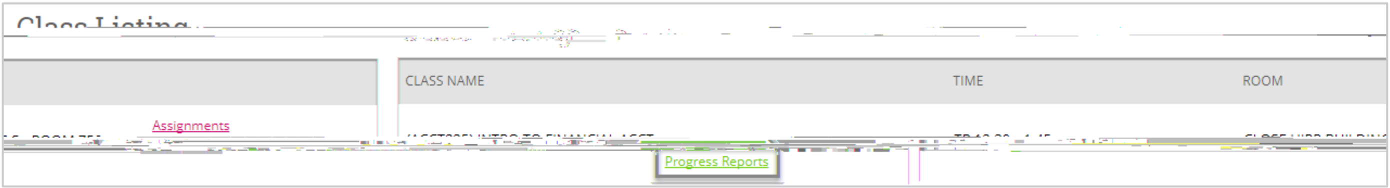
Only those students for whom you are concerned about need to be marked, the un-marked students can be submitted as not at-risk in the course by clicking the blue button at the bottom of the screen once finished.



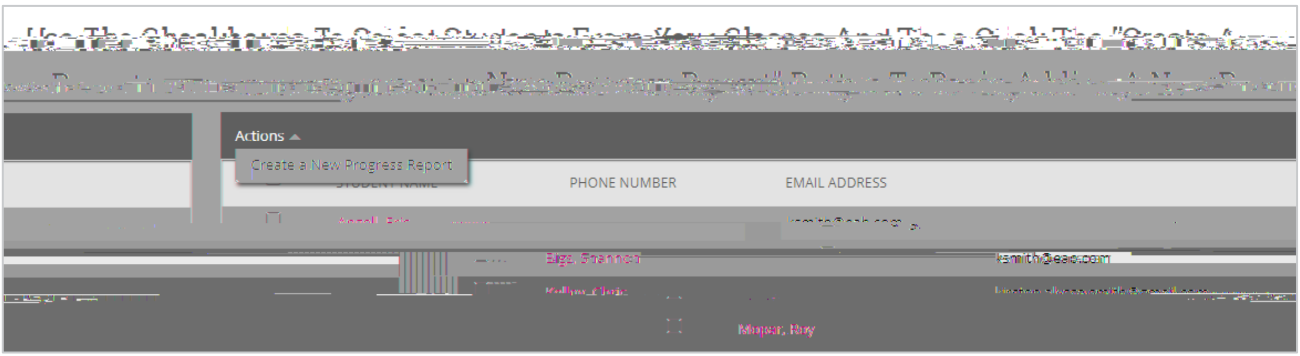
Submitting Ad-Hoc Progress Reports

As a faculty member you have the option to provide progress report feedback on an ad-hoc basis.

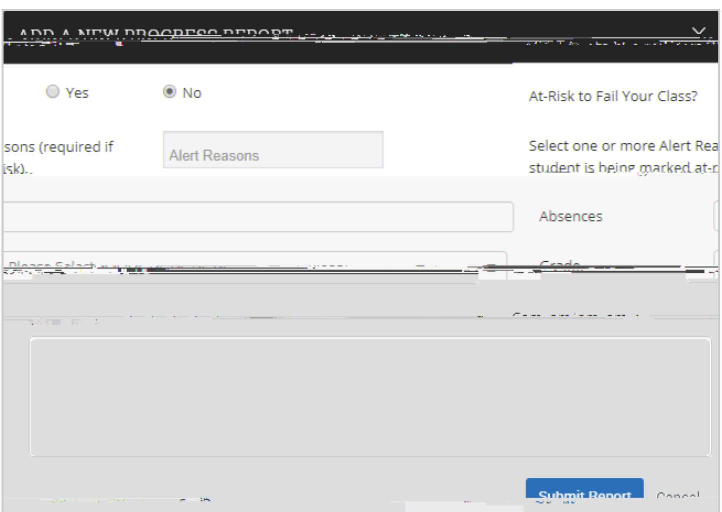
From the Professor Home, click the Progress Reports link beside the course for which you wish to submit a progress report.



The Progress Reports page will then show any previously submitted reports for the students in the course. Beneath this section is the ability to create a new progress report for multiple or individual students. Select the box beside the student's name and under the Actions dropdown, choose create a New Progress Report.



The Progress Report will need to be completed in a dialogue box that will appear. The requirements on the form will be the same as those seen on the campaign feedback form. As an institution there can be some customizations made to the fields displayed in this form.

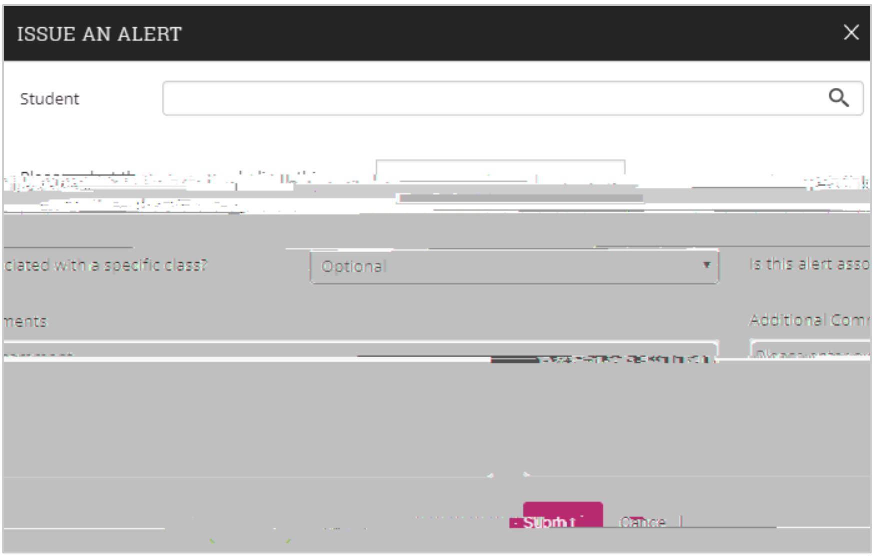


Alerts & Case Management

Issuing Alerts

If a user has the ability to issue an alert then there are a few places throughout the Campus platform where this action can be taken.

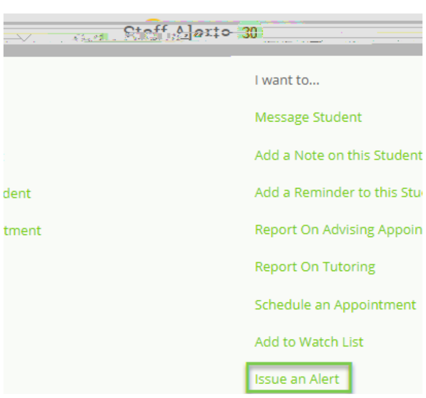
Home: From any Home screen, a user with permission to issue an alert will be able to perform this action. On the right side of the Home there is an Actions box within which there is an option to Issue an Alert. When using this method a student must be selected using a name or student ID to search for them. The alert dialogue box also asks for the reason(s) the student needs assistance, users will choose from a pre-set list of reasons that the SSC Leadership Team has created. Please reach out to your SSC Administrator if there are alert reasons that you feel are missing. Additional fields on the alert dialogue box are the option to select if the concern is related to a specific course and to add any comments related to the issue or referral.



Home: From any Home screen with either students assigned or students enrolled in a course, alerts can be issued by selecting the box beside the student's name and choosing the Issue Alert option from the Actions dropdown. When using this method the student's name will be auto-filled in the dialogue box.

Search Results: If you choose to search for the student in the Advanced Search then you can select the box beside the student's name and navigate to the Actions dropdown. From the list of Actions, choose Issue an Alert.

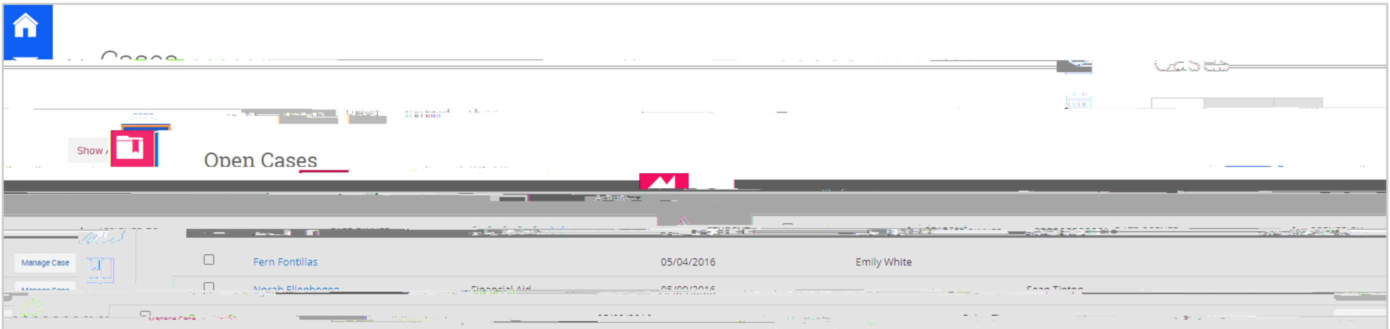
Student's Profile: Use the Quick Search to find the student with whom you met. Once on the student's profile, navigate to the right hand menu. In the "I Want To…" actions section there will be an option to Issue an Alert.



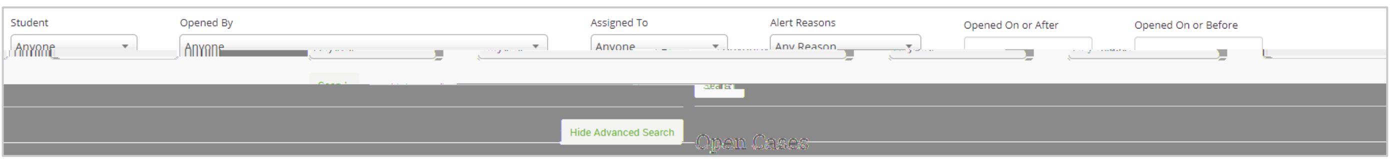
Managing Cases

Depending on how the SSC Leadership Team has designed the alert process, certain reasons selected when issuing an alert will open a Case for follow-up with a student.

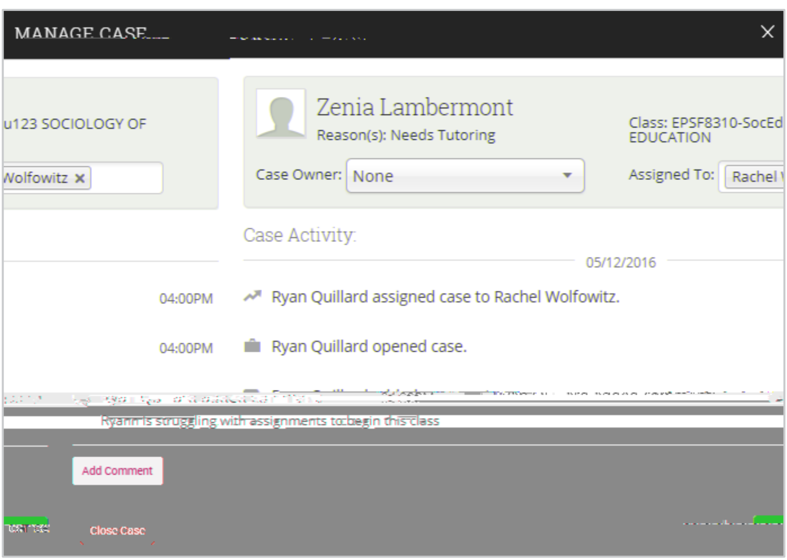
Cases Tab: If you have the ability to manage cases that have been assigned to you then you will have access to the Cases tab, which looks like a manila folder.



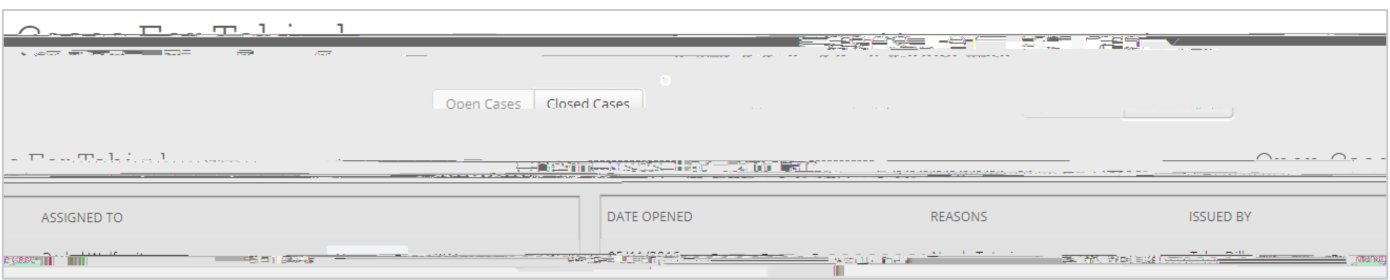
To better manage the cases assigned to you or your team, use the Show Advanced Search button to expand the filtering options:



The Cases dashboard will display the reason for the issue and who submitted the alert. In order to manage any assignments to other users or to add commentary on the progress of the follow-up, select the Manage Case button. By clicking Add Comment, an open text box will appear to let the user share commentary on the progress of the case.



Student Profile: If you have the ability to view the student, the History tab, the Cases on the History tab, and are assigned to manage Cases then you will be able to handle any case management from the specific student's page in addition to the Cases tab. Filter the History Tab by Cases to easily view the open cases for the student. By clicking Manage Case the same dialogue box above will appear.



Closing Cases

Once the case is deemed complete it can be closed by clicking the red Close Case button. This will lead you to a second screen which prompts you to choose from a list of outcomes for the case. This list has been created by the SSC Leadership Team at your institution. Depending on how the Campus platform has been configured the closing of a case may initiate an email to the person who initiated the alert.

“Enrolled” as your Enrollment Status, and “Spring 2016” as your Enrollment Term. Click “search” to load your results.

Next, find a list of currently enrolled students assigned to you. To do this, do not enter a keyword. Instead, select “Students” as your type, “Enrolled” as your Enrollment Status, “Spring 2016” as your Enrollment Term, and check the box next to “My Students Only.”

2. Advanced search: Allows you to search on multiple filters that build upon one another.

   Navigate to the search homepage once again. To the right of Simple Search, click the button “Show Advanced Filters”

   Search for students that meet the following criteria (Hint: click the down arrows on the right hand side to expand filters and insert your criteria)

   i. Cumulative GPA between 1.0 and 2.0

   ii. Classification of Sophomore

3. Actions from search: Once you have generated a list of students, click the box next to a student name to select a student OR click the box next to “ALL” to select all students on the list. Then click the drop down arrow beside “Actions” on the left hand side.

   Note the available actions. Click the following options to see how each of these functions can be used:

   i. Send Message

   ii. Appointment Campaign

   iii. Note

   iv. Others of your choice!

Navigating a Student’s Profile

1. Choose a student from your list of assigned students.
   a. Click each of the tabs across the top of the page to familiarize yourself with the content of each.
      ii. Overview
      iii. Success Progress
      iv. History
      v. Class Info
      vi. Major Explorer
      vii. More (select options from the drop down menu).

Tag – Tags are like categories, but they allow individual users to group similar students together by a common affiliation not otherwise captured in the data (e.g., choir member, interest in graduate school). All users can utilize tags to search for, report on, or communicate with these groups of students. Only some users (based on institutional configuration) can create and edit tags. A student can be assigned multiple tags, and the tags that have been applied to a student display at the bottom of the student's Overview page.

Reminder – There are multiple reminders in the platform. Students have the option to receive emails and text messages that remind them of an upcoming appointment. Advisors can also add a reminder to a student account to remind themselves to follow up or complete a certain task.

Success Markers- A course or group of required courses key to student success within a major, frequently first and second year courses, which are entered into the Student Success Collaborative Platform so that advisors can identify and intervene with students who not completing the markers. They are comprised of a time by which students must complete the course and the recommended grade threshold students should achieve.