EAB | Student Success Collaborative™

EAB Campus
Advisor Training Guide

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Searching for a Student

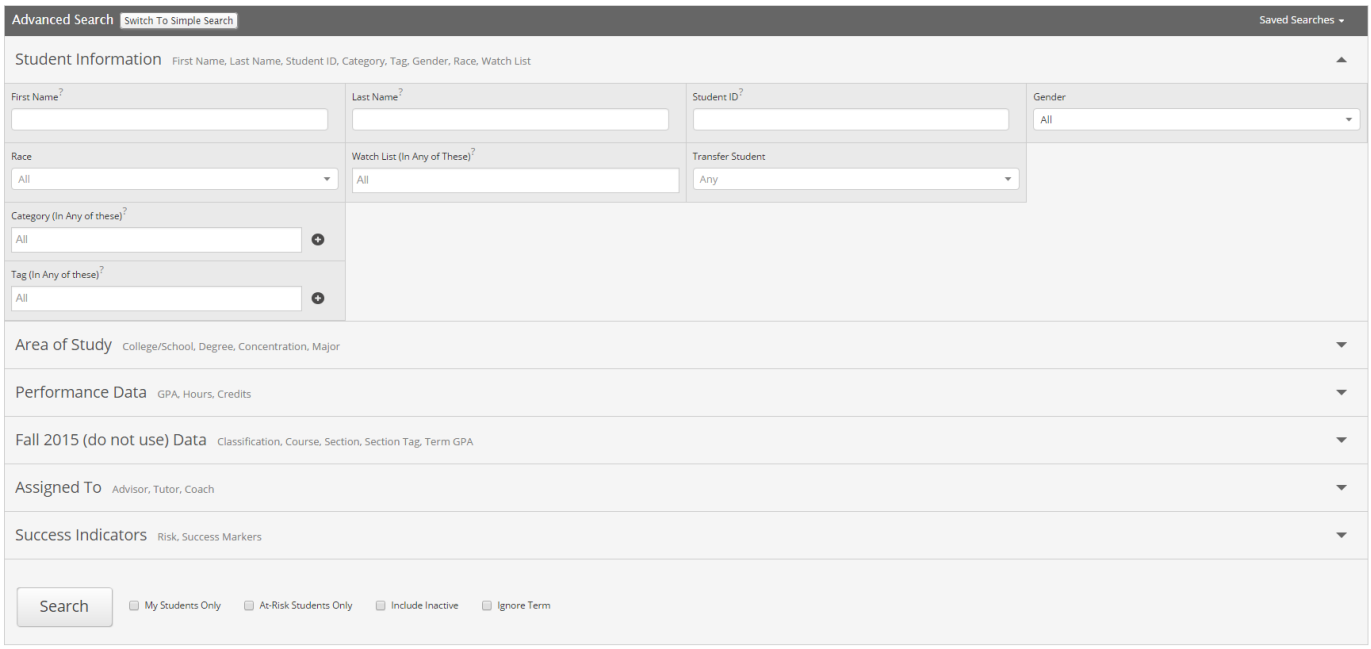
Quick Search

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

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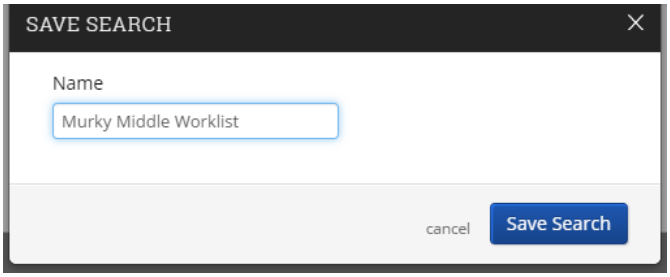
direct, one-to-one student assignments. Students are assigned to professors based on their course rosters.

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

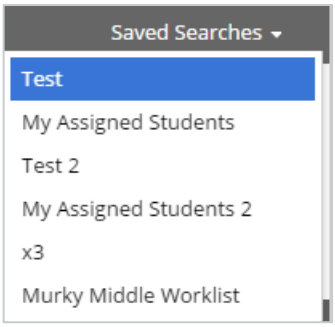
3. **Include Inactive** - By default, the search results only display users who are active in the currently selected term. Checking this box includes students from past terms as well.

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.

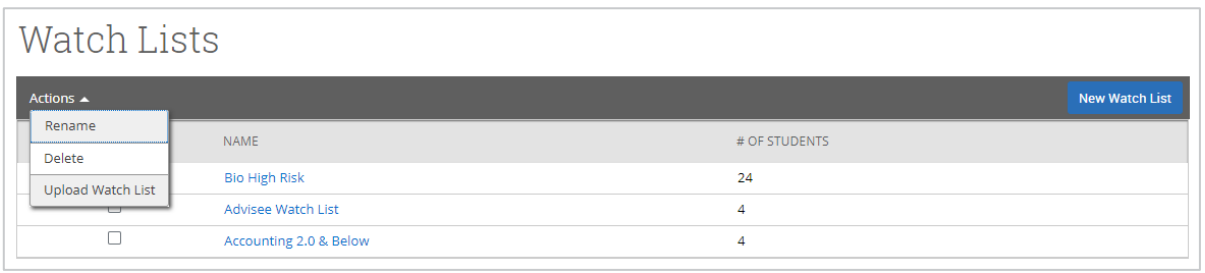


All saved searches can be accessed through the Saved Searches drop down on the upper right hand side of the Advanced Search page. You can also see the results of your Saved Searches on the Advisor Home by switching from Assigned Students to a specific Saved Search or by navigating to the Lists & Searches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



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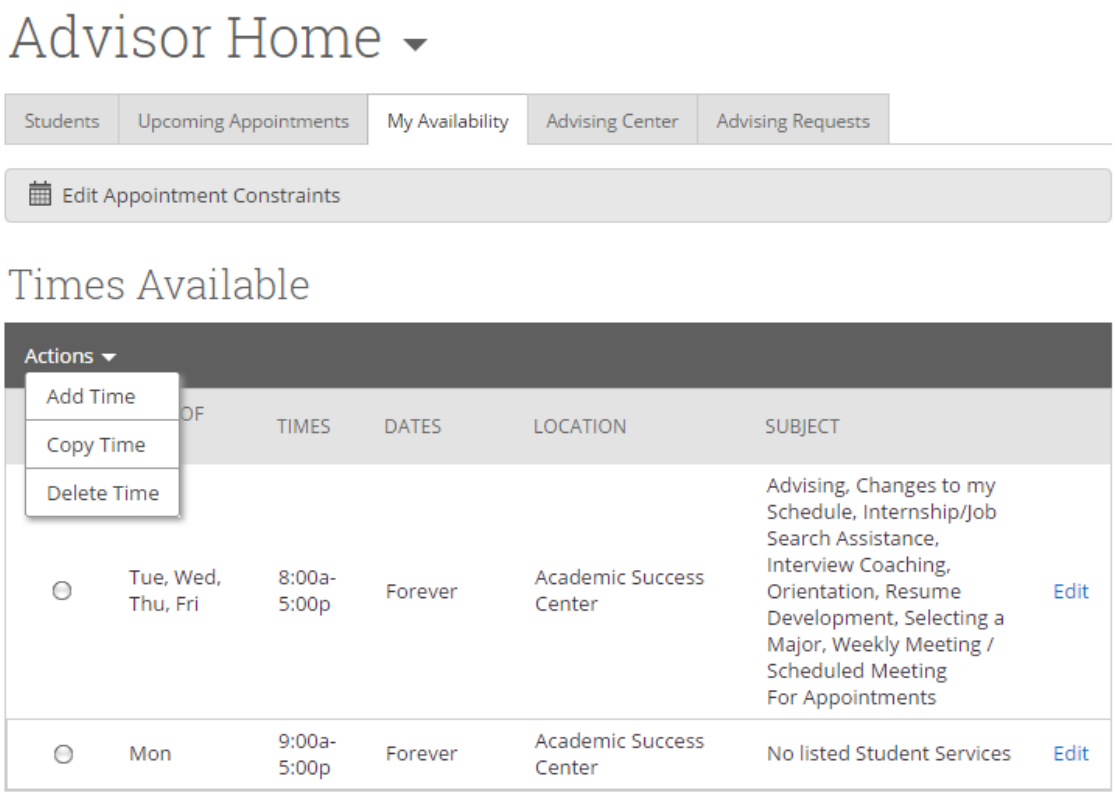
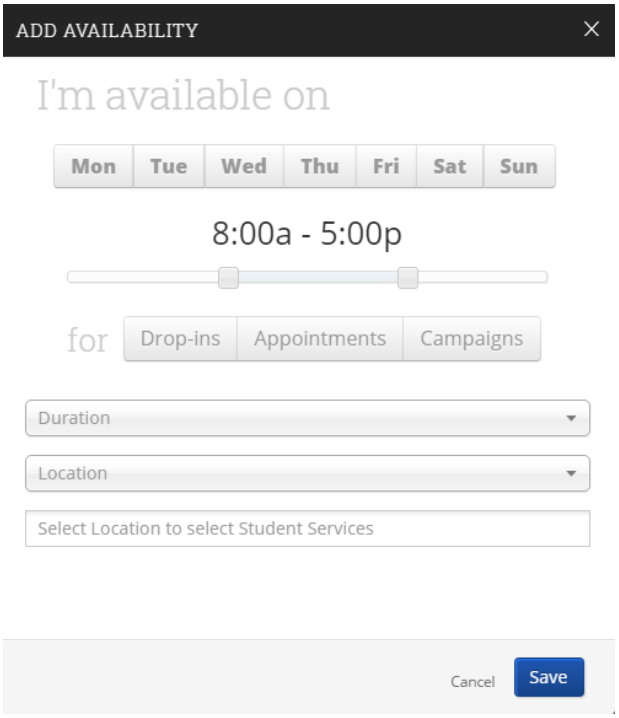
Setting Up Your Availability

Availability

As a new user, the first thing you need to do is set up availability in EAB Campus so that students can schedule appointments to see you. It is important to note that locations and services are created by university administrators.





Add Time-

Step 1: Click the Add Time button in the Actions Menu

Step 2: Select the days and times when you are available to meet with students.

Step 3: Select whether you will meet with students via appointments or drop-ins during that time. The campaign option is availability reserved specifically as dedicated time for targeted students to make appointments with you.

Step 4: Choose the location where you will be available.

Step 5: Lastly, select which student services you can provide to students during this availability. Note: Leaving this student services field empty means you will appear to be available for all advising student services.

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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.

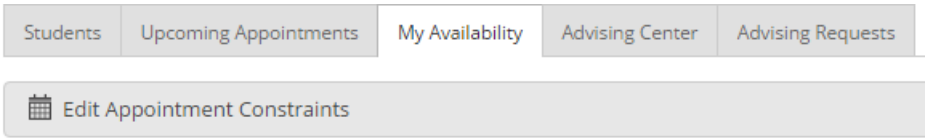
Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied and a dialog will open allowing you to make edits or to save your newly created availability.

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

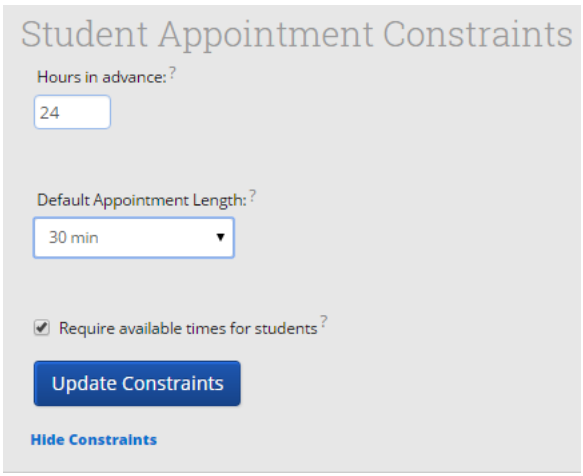
Note: Inactive availabilities are highlighted in red in the Times Available grid.

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 not 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.

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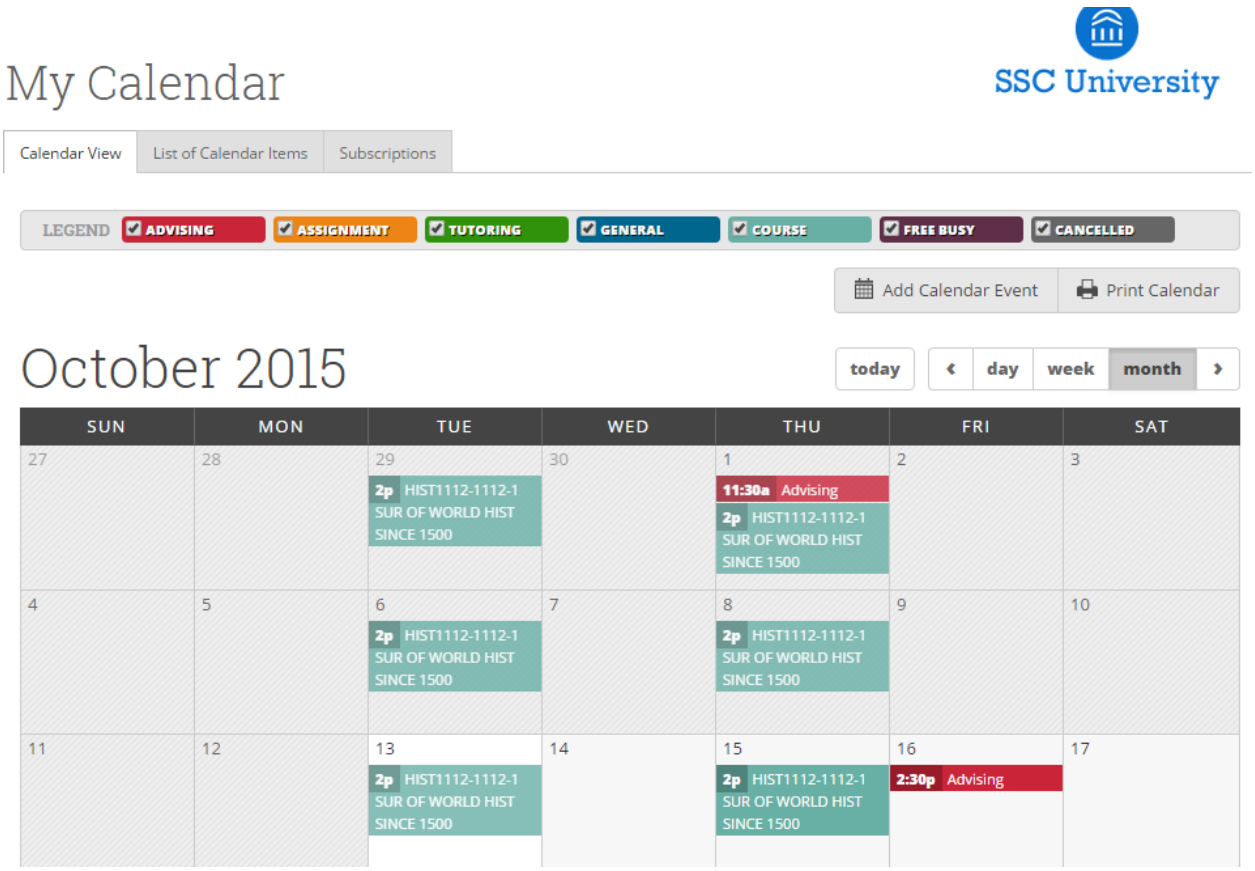
EAB Campus Calendar

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).

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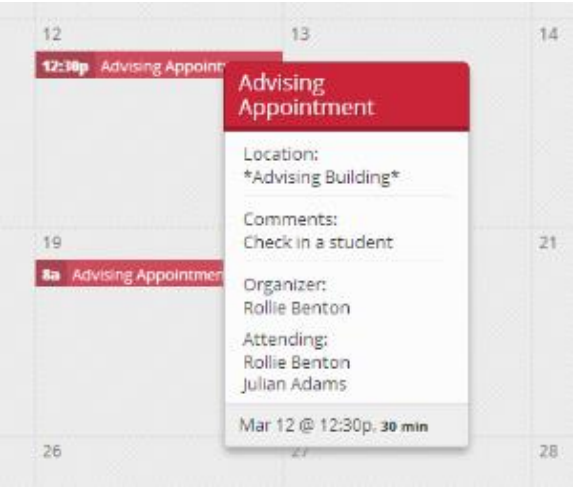
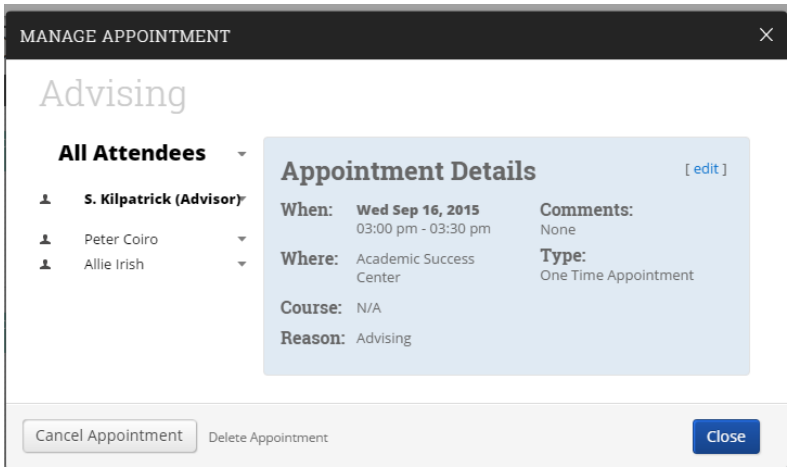
Viewing the Calendar Details

A user is able to hover over the calendar detail for a pop-up with more information and can click into the appointment for even further information. From the "Manage Appointment" screen a user would have the ability to edit, cancel, or delete an appointment if they were provided with those permissions by administrators.



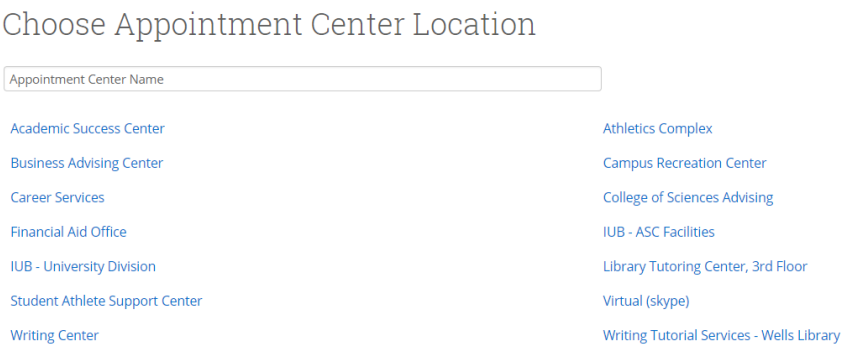


Appointment Center

Opening and Choosing Location

To open the Appointment Center, click "Additional Modes" at the bottom right of the screen and select "Appointment Center".

After clicking the link, you will be taken to a screen to choose a location to schedule an appointment at.



Actions from the Student and Appointment Cards

When checking in a student for an appointment or a drop-in, users will be able to see additional information and take additional actions from the student card of the selected student.

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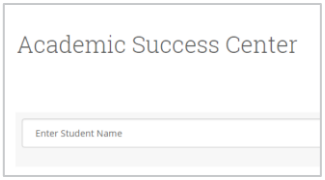
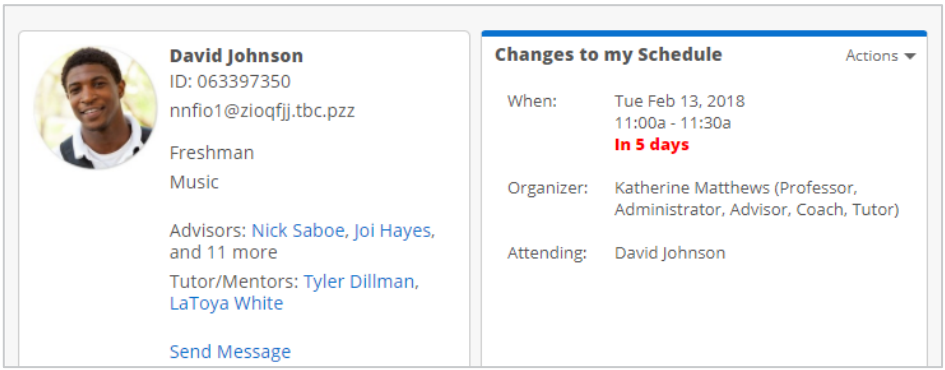


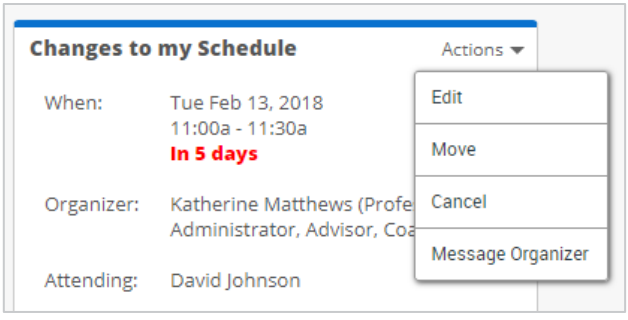


Available student information:

- Student Photo (if being sent to EAB)
- Student ID
- Email Address
- Major
- Classification
- Assigned Staff
- Upcoming Appointments at the location

Actions:

- Send Message to Student
- Edit Upcoming Appointment
- Move Upcoming Appointment to another time slot
- Cancel Upcoming Appointment
- Send Message to Organizer (Advisor or Tutor)



Scheduling Grid

The calendar interface shows available time for appointments as white blocks and unavailable times as grey blocks. Blue blocks along the side indicate available drop-in times. If you click the "Staff" icon on the right side of

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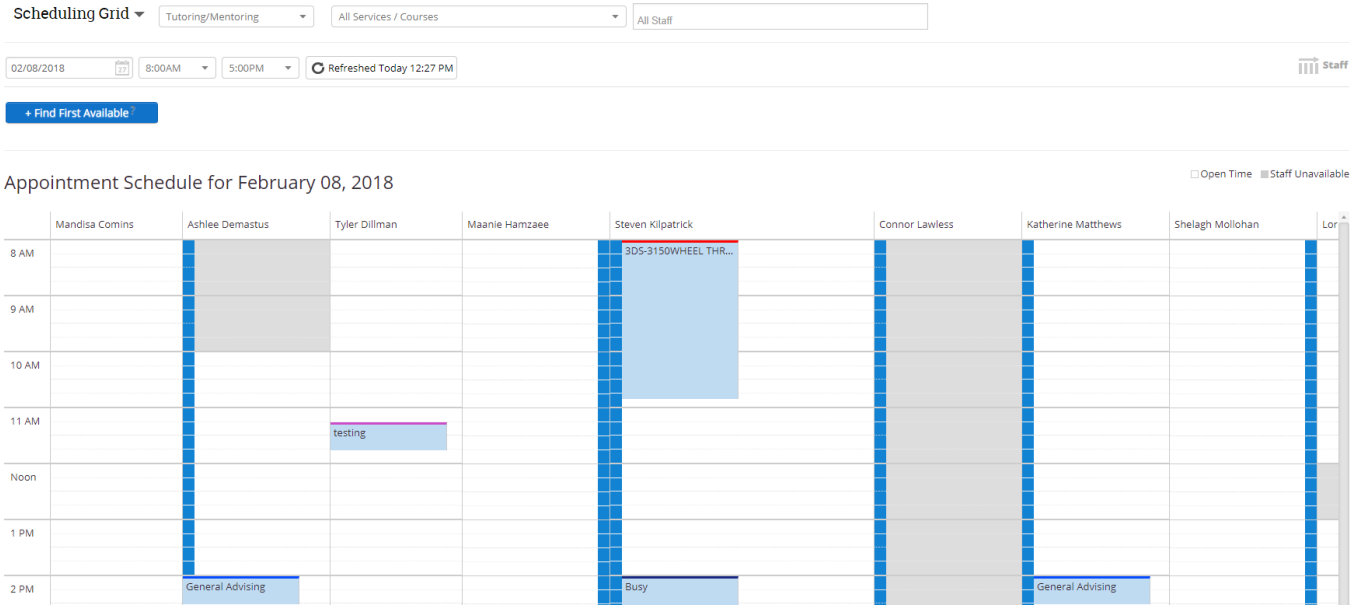
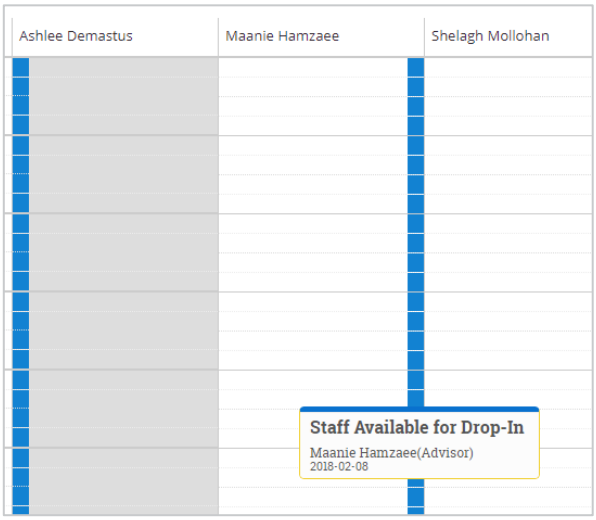
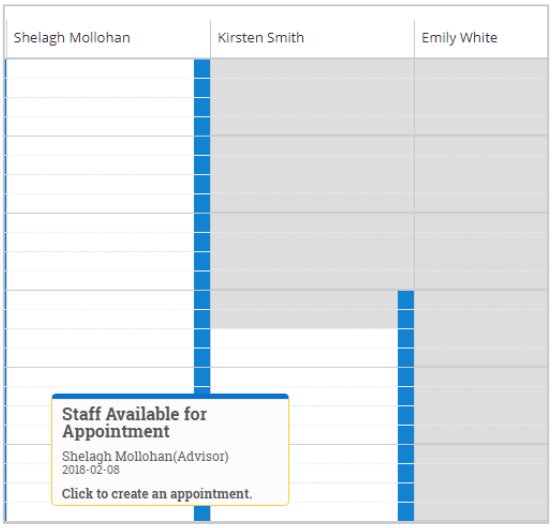
the screen, you will be able to change the orientation of the staff and times if you would prefer one to be the column header over the other.

It is possible to filter who appears on the grid by using the Scheduling Grid dropdown filter. There is also a filter for the specific services/courses that the location offers and has staff available for so that if a student is seeking someone for a particular reason this can be narrowed in on within the Scheduling Grid.



You can schedule appointments from the screen by clicking on an open slot on the scheduling grid or view available drop-in times to add a student to a staff member's queue.





Once you select an appointment slot, a pop-up window will open letting you set the details of the appointment. If the name of the student was selected at the top of the Appointment Center then this dialogue box would display the student's name. If the service was selected when filtering the Scheduling Grid then it will auto-fill in the dialogue box, but if not then the scheduler will need to select the reason for the appointment.

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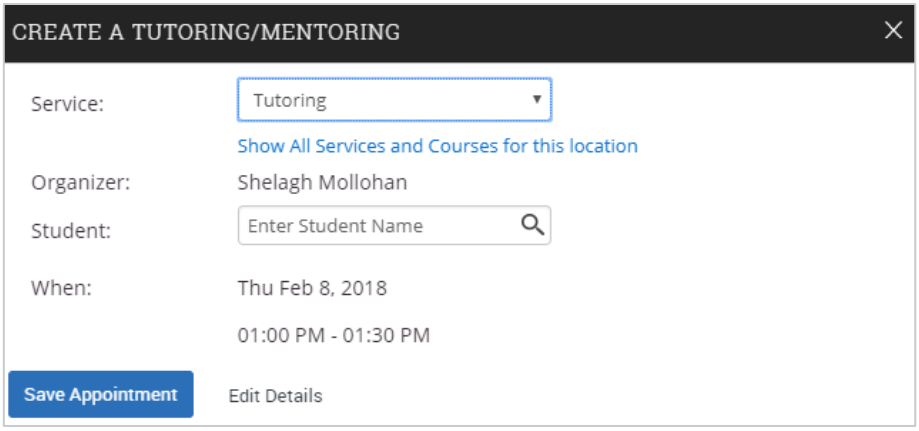
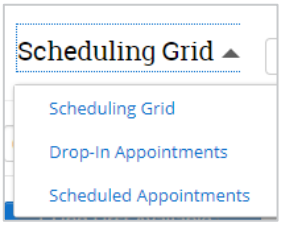


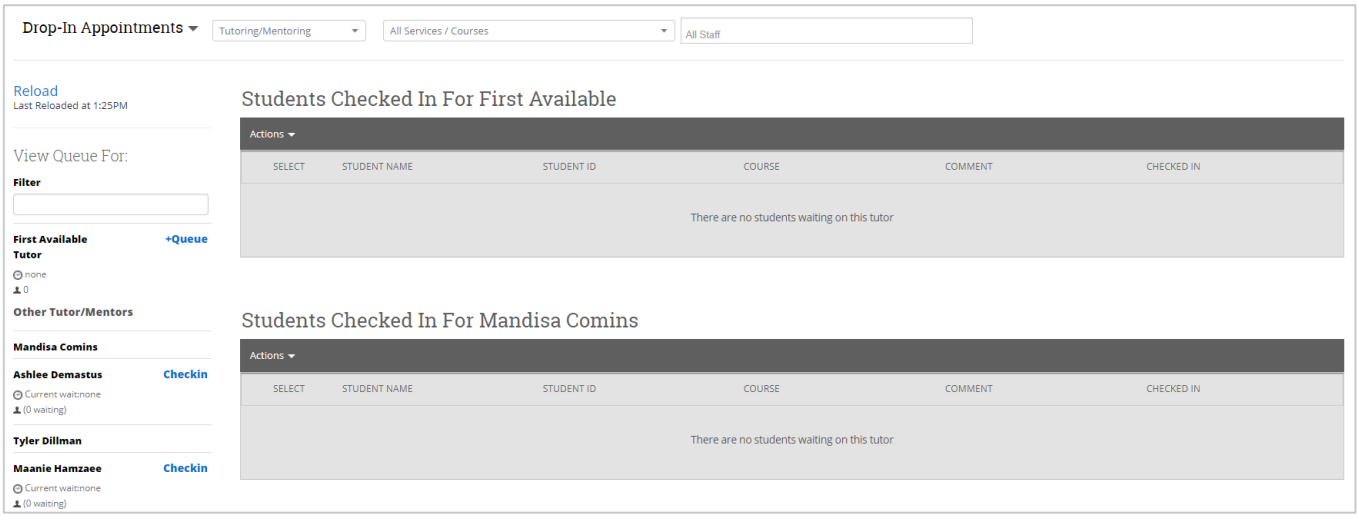
The option to Edit Details will allow more flexibility around the time of the appointment, if it should start at a time within the 15 minute ranges or be for a duration other than 30 minutes. This also expands the Comments box to allow the scheduler to provide any input the student has shared regarding the purpose of the appointment. Additional options appear to check in the student and send email or text reminders.

Drop-In Appointments

In many cases, a front desk staff worker may need to view today's appointments. With the "Drop-In Appointments" screen, users can view all of the drop-ins for the current day and take action from the list. You can find this screen by clicking the dropdown to the left of the filters at the top part of the screen.



Users are able to add students to a queue from the left hand side. They can add students to either the First Available Queue or a specific staff member's queue.



Check-In Without Specific Staff Button

There is a button beneath the list of staff that says "Check Student in Without Specific Staff". This button allows front desk workers to check in students to track the duration of a visit (check-in and check-out time) if there are no staff users to check the student in with.

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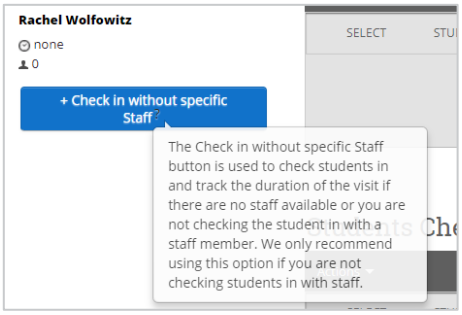
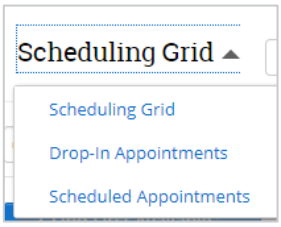
This button is recommended only when/if there are no staff available for drop-ins or for when you do not need to check a student in with a staff member. This means that the student's visit will not be tied to any staff member when accessing appointment reports. Once the student is checked in, users can see that student in their Staff Queue tab on their profile.



Scheduled Appointments

A front desk staff worker may need to view today's appointments. With the "Scheduled Appointments" tab in Appointment Center, users can view all of the appointments for the current day and take action from the list.



Actions include:

- Send message to Attendee (Student)
- Send message to organizer(s)
- View Appointment Details
- Check In (only for Upcoming Appointments)
- Check Out (only for Upcoming and In Progress Appointments)
- Mark No-Show (only for Upcoming Appointments)
- Cancel Appointments

When choosing multiple appointments, actions are limited to sending messages and canceling appointments. This gives users the ability to cancel all appointments for a given day in a particular location.

Users also have the ability to select any date and see appointments on the selected day.

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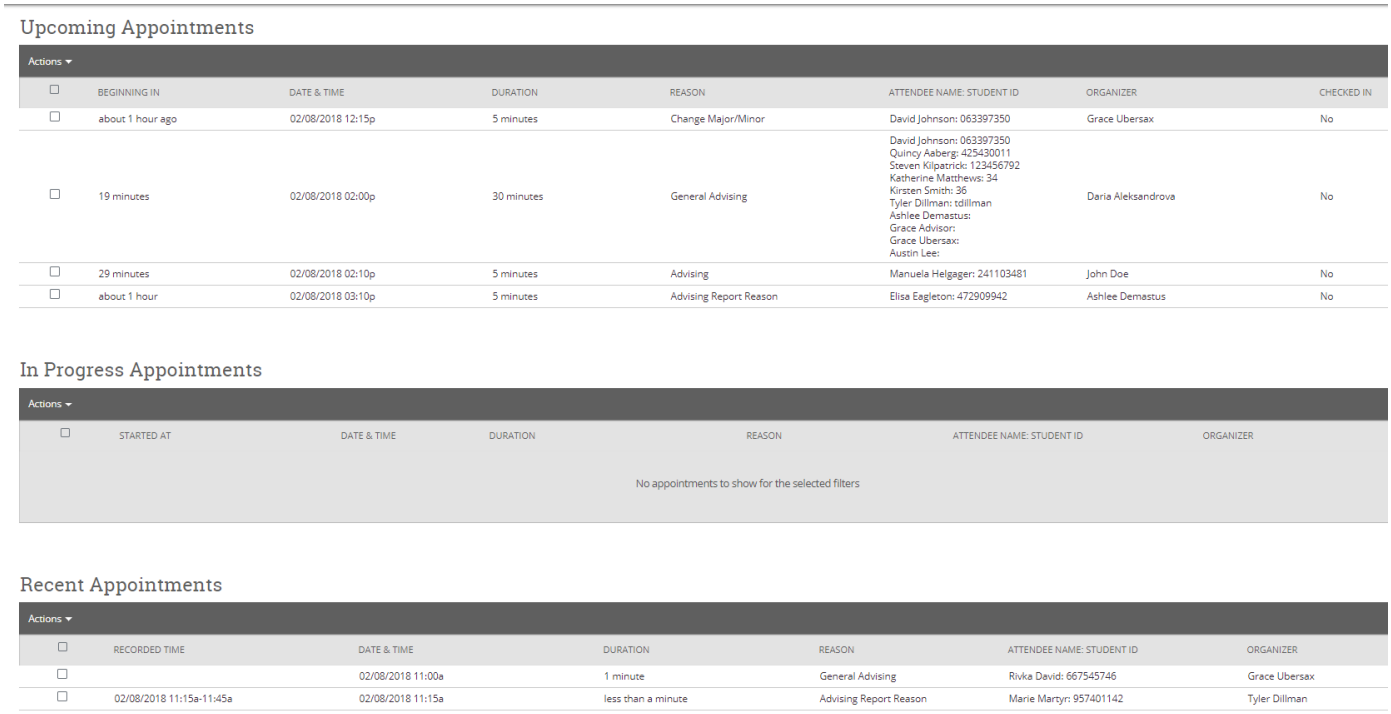
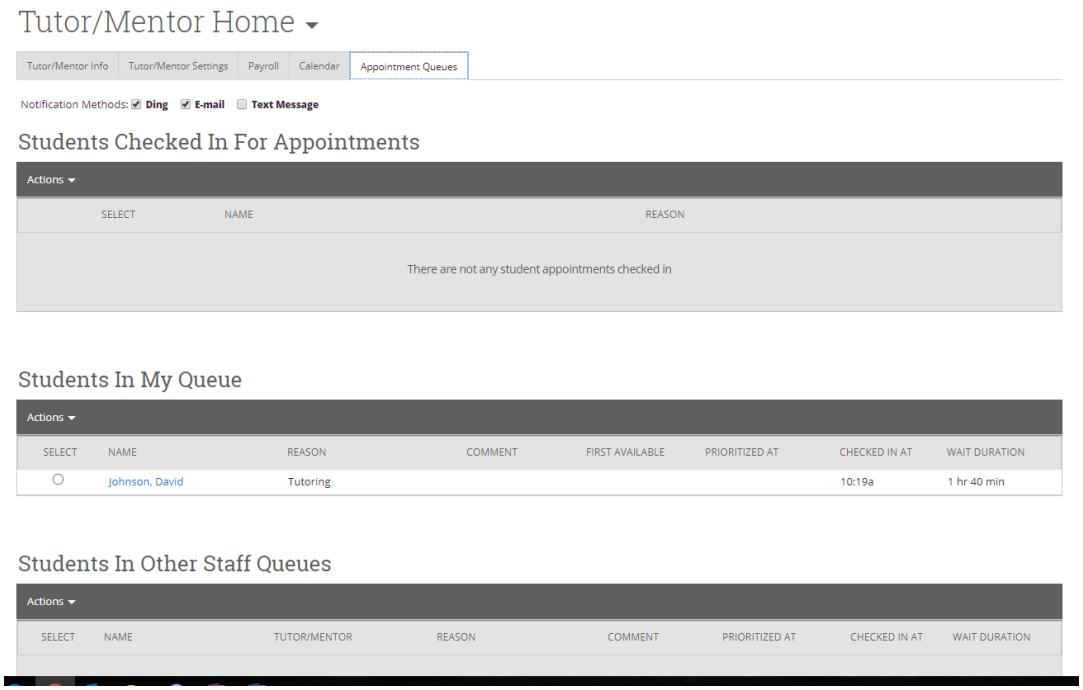


Managing Drop-In Queues

If an Advisor is using the Campus platform then they will see a black notification in the top right corner if a student checks in for a drop-in session through the Kiosk. If the tutor navigates to their Home page and selects the Appointment Queues tab then they can set up other modes of notification: Ding, Email, and/or Text.



Students checked in for Appointments: This section will show any students who have checked in for appointments either through the kiosk or with a person at the front desk who is able to check them in through the Appointment Center feature of EAB Campus.

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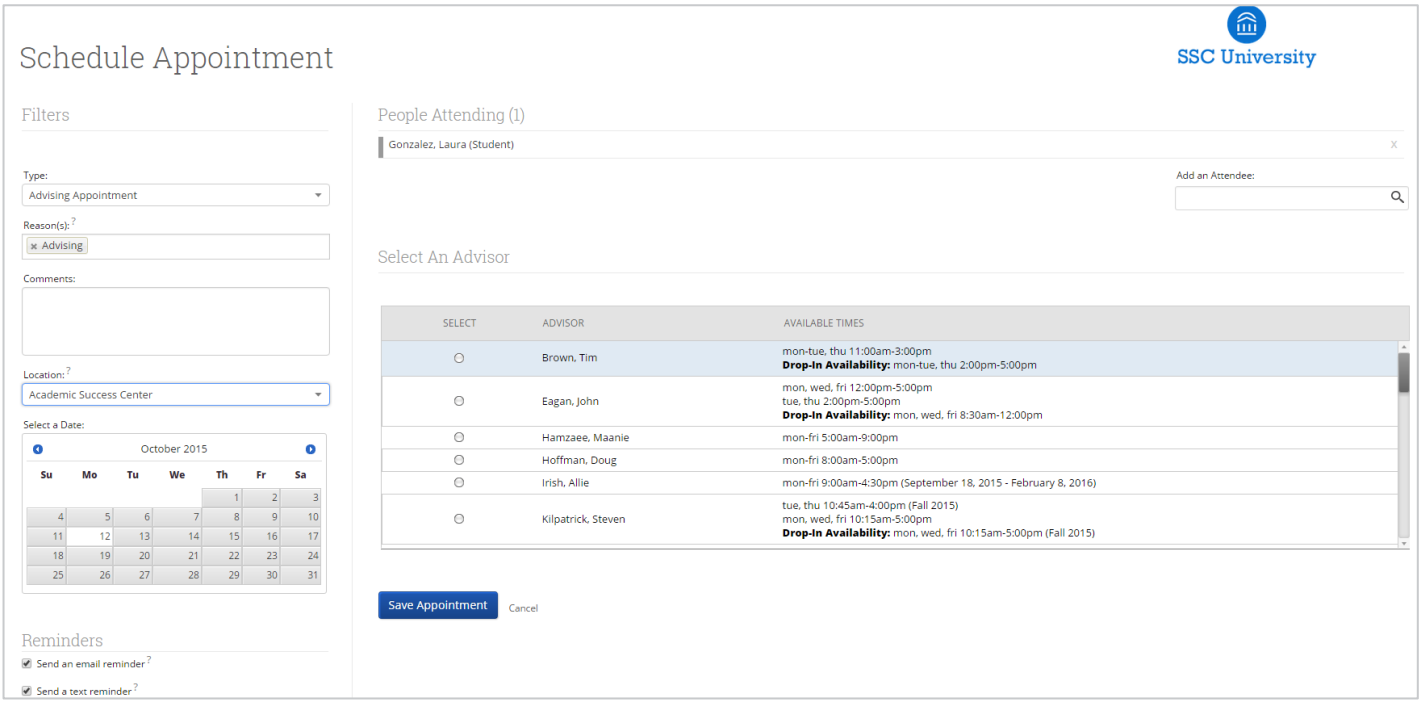
Students in My Queue: This section will show any students who have checked in for drop-ins either through the kiosk or with a person at the front desk who is able to check them in through the Appointment Center feature of EAB Campus.

Students in other Staff Queues: This section will show any students who have checked in for drop-ins with other members of the location's staff either through the kiosk or with a person at the front desk who is able to check them in through the Appointment Center feature of EAB Campus.

Scheduling an Appointment

Appointment Scheduling

Users with appropriate permissions can schedule appointments by checking the box beside students' names in various lists throughout the application and by clicking on Schedule Appointment in the Action Menu. These lists are typically found on your home page and in Search areas of the application. The system will then display the Schedule an Appointment page.



Appointment Components

Type is what determines whether the appointment you are creating is an Advising, Tutor, or General appointment. While both Advisor and Tutor appointments are fairly self-explanatory, a General appointment may not be. A General appointment can be considered an obligatory event for the student. Events that can qualify are things like Football practice, Honors Society Dinner etc. The reason adding this type of event to a student's calendar is important is because those events will then show up as "Conflicts" when scheduling future appointments. It is usually a best practice to only worry about those General events when they occur during the regular school day or office hours.

Reasons is where you will select the purpose of the appointment. For example, Career Counseling and Schedule Changes can be valid reasons for advising appointments. For Advising and Tutoring appointments, reasons are configured by your Campus Administrators. For general events, the reasons field is open.

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Comments is a section where extra commentary can be entered about the appointment. These comments are seen by both the student(s) and the advisor when they look at their calendar and receive their appointment notification email.

Select a Date really means select a week in which you would like to schedule the appointment. This lets users see the entire week, and not just a single day, to determine what the best day is to schedule the appointment.

Location is where you will meet your students. Select the appropriate location from the drop down list**.**

Reminders are sent the day of the appointment. The email reminder is sent the morning of the appointment and the text message reminder is set "x" number of minutes before the appointment. "X" number of minutes is actually defined on the Admin tab by your Campus Administrator. You can mouse over the "?" mark, besides the text reminder, to see what the current value of "X" is.

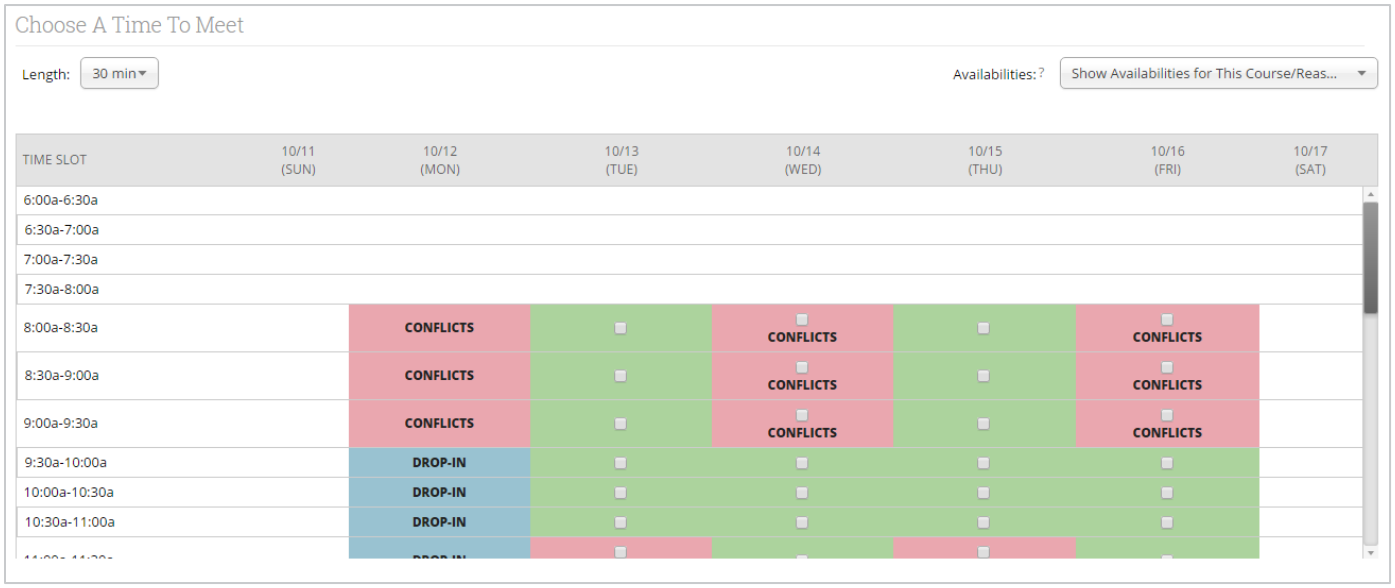
Add an Attendee lets the advisor add extra users without having to exit the schedule appointment page. Simply type in the user's name, select them, and they will be added to the appointment.

People Attending are the users who will be scheduled for this appointment. The user scheduling the appointment is able to *Remove* or *Add an Attendee* prior to saving the appointment.

Select an Advisor is the list of advisors who have availability at the selected Location. Since you are creating an appointment for yourself, simply check your name.

Length refers to the length of the appointment. While it will default to whatever the advisor had setup in the availability, it can be overridden here.

The Scheduling Grid is where you will actually select what time this appointment will take place. You will notice that a checkbox will appear for any times that are available for scheduling. If something is already scheduled or "Conflicts" with that time, you will see that notated on the grid. For example, Appointments, Free Busy, Conflicts (such as a student's class), or in some cases Drop in's for walk in appointment times. A blank means the selected advisor does not have availability for that time on that day. You can click on the word Conflicts or Appointment to see who has a scheduling conflict.



Availabilities is where you can override everything and schedule the appointment at any time at any day. Select the option 'Ignore Availabilities, unlock the calendar' and you will see checkboxes appear in every field in the grid. Selecting this option allows you to override any conflict or non-available day to schedule the appointment exactly where and when you want it.

Repeat This Appointment? Is where you can make this appointment recurring. While there are many options to choose, the most common and easiest to use is 'Weekly'. Select Which Days, Every how many weeks and Repeat Until to make this appointment repeat.

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To finish, click the **Save Appointment** button. When the appointment is saved, the system will send appointment notification emails to each of the attendees with the details of the appointment. It will also update each attendee's calendar.

Creating an Appointment Campaign

Navigating to Campaigns: While on the advisor home screen, select "Appointment Campaigns" from the left hand side Quick Links section. This will take you to the Campaigns tab. From there, select Appointment Campaign from the right hand side, under Actions.

Define Campaign:

- Name your campaign (Students will not see the name of the campaign)
- Select "Advising" as the Campaign Type
- Select 1 slot per time
- Under "Select Course or Reason", choose the services for which you are available. **NOTE:** This must match the availability you have set up on your advisor home page, under "My Availability". In that screen, you must have selected matching appointment reasons. For example, if in your advising campaign you say you will be available for "Registration", you must also have chosen "Registration" as a service you are available for in your campaign appointment availability.
- Begin Date and End Date- choose the date range for which you want the campaign to run. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired. **NOTE:** This must match the availability you have set up on your advisor home page, under "My Availability". Ensure that you have created CAMPAIGN availability (as opposed to appointment or drop in availability) during the timeframe that you would like your campaign to run.
- Appointment Length- how long do you want the appointment to last?
- Appointment Limit- how many appointments can the student schedule for the campaign? (default is 1)
- Location- Choose your location. **NOTE**: Ensure that for the campaign availability you have created under "My Availability" you have selected that you will be available in the same location (Advisor's office).

Adding Students: Use the advanced search feature to search for students you would like to participate in the campaign. Or, choose one of your saved searches by clicking the drop down arrow beside "Saved Searches". If you want to ensure that you only return a list of students assigned to you, also click the box beside "My Students Only) next to the Search button. Select the students you wish to include in your campaign. Confirm the list of students included and remove or add students as needed.

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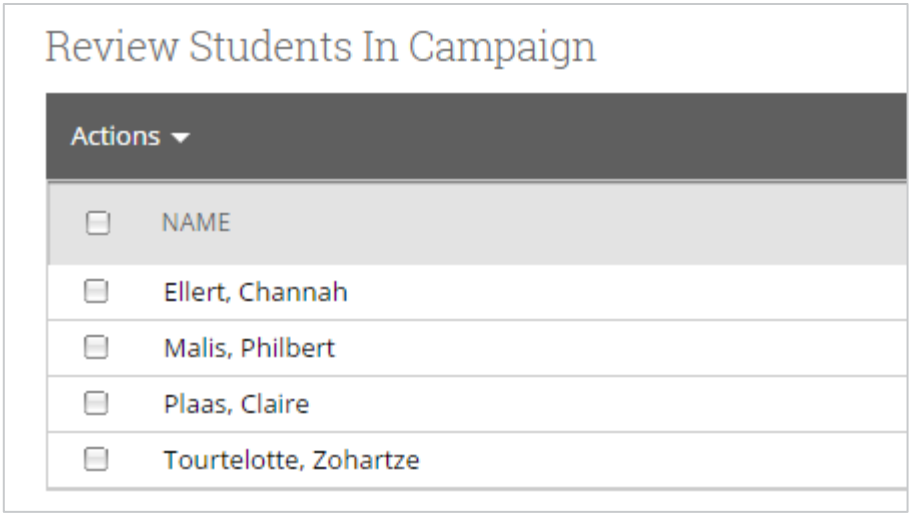

Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under "Add Advisors to Campaign". If applicable, select other advisors to join your campaign.

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."
- As you edit these fields, the text in the box below will show how your edits will appear in the message.
- Scroll down to the bottom of the screen. On the left tab, you will see a snapshot of what the email the student receives will look like.
- On the right tab, you will see the scheduling landing page. This is where the student will be directed to choose a time for their appointment when they click the link in their email.

Confirm & Send: Review the details of your campaign. When you are ready, click send to issue the email to students on the list.

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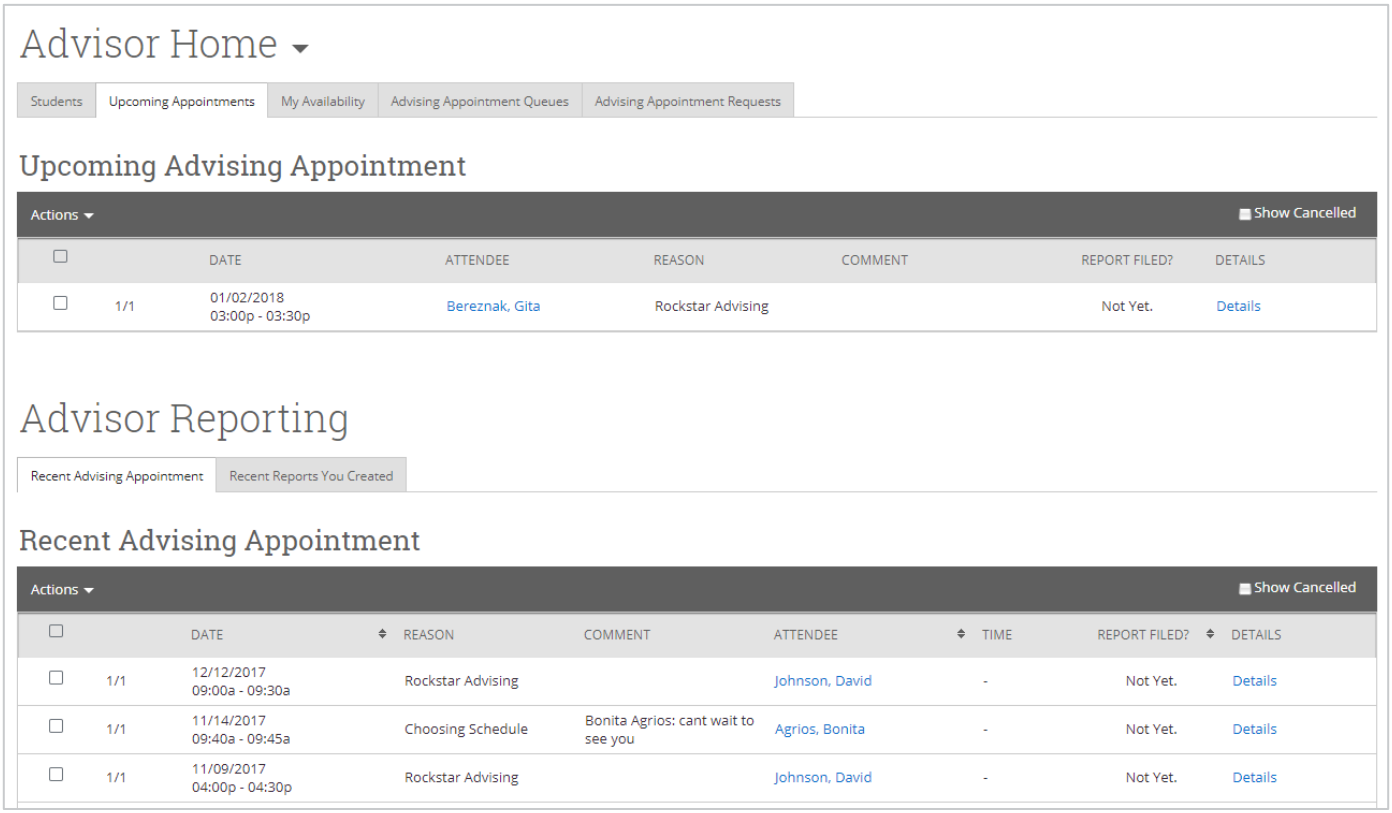
Completing an Appointment Summary Report

Filing a Summary Report for a Scheduled Appointment

The Appointment Summary Report is the record of any interaction with a student. If the meeting was a pre-arranged appointment scheduled through Campus then follow the instructions below to complete the associated Summary Report. These reports once saved will be available on the student's profile in the History Tab and will be accessible to anyone who has permission to view the particular student, view the History Tab, and view Summary Reports. If you have additional questions about who is able to view the Summary Reports then please check with your SSC Administrator.

Navigate to the Home's Upcoming Appointments Tab:



Upcoming Appointment: Select the box beside the upcoming appointment for which you intend to complete a Summary Report. Once selected, click on the Actions dropdown and choose Add Appointment Report. This will open a dialogue box with the Summary Report template pre-filled with the date, time, reason, and location of the appointment. The report pop-up can be minimized to allow for navigation to other areas of the Campus platform and to refer back to during the appointment.

Recent Appointment: Select the box beside the upcoming appointment for which you intend to complete a Summary Report. Once selected, click on the Actions dropdown and choose Add Appointment Report. This will open a dialogue box with the Summary Report template pre-filled with the date, time, reason, and location of the appointment. Once the report is saved, there will be a green box titled Report Details in the Report Filed column for you to refer back to at any time.

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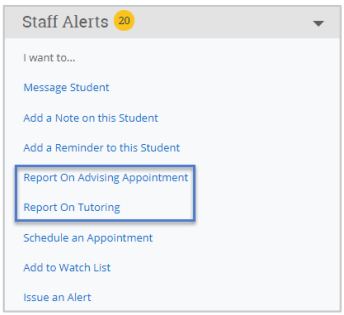
Filing an Ad-Hoc Summary Report

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.

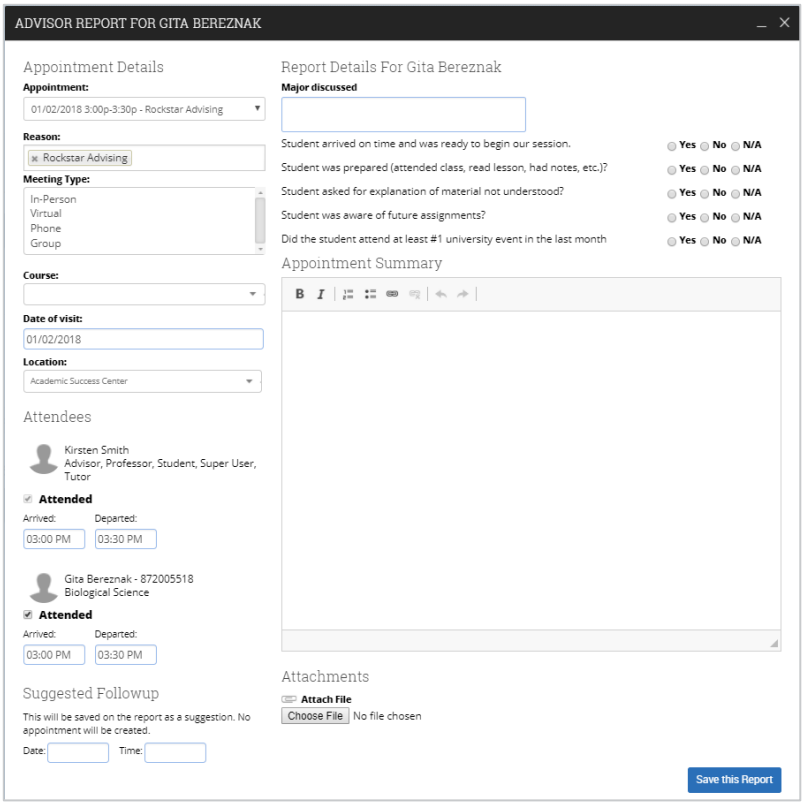
Student Profile: Use the Quick Search to find the student with whom you met. Once on the student's profile, navigate to the right hand menu. In the "I Want To…" actions section there will be an option to Report on Advising or Report on Tutoring depending on the type of service you provide.



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 Appointment Report (Advising or Tutoring) to file the Summary Report for your interaction.

Appointment Summary Report

When completing a Summary Report for a scheduled appointment the date, time, reason, and location of the appointment will all be pre-filled, although additional reasons can be added. If a Summary Report is created ad-hoc then all of this information needs to be added. The form offers the ability to choose a meeting type, select a course discussed, and mark if the student attended, was late, or departed earlier than the scheduled time. Additionally, the SSC Leadership Team has the option to configure four open text boxes and six Yes/No questions if there is specific information they are seeking to capture.



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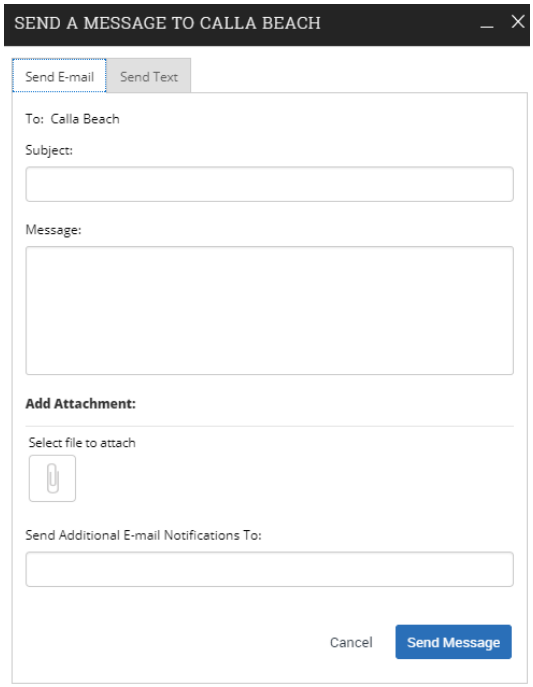
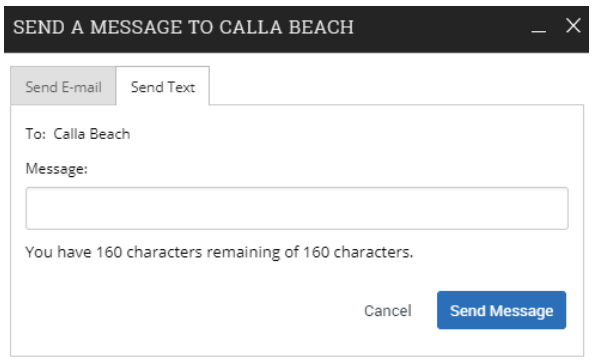
Messaging

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.

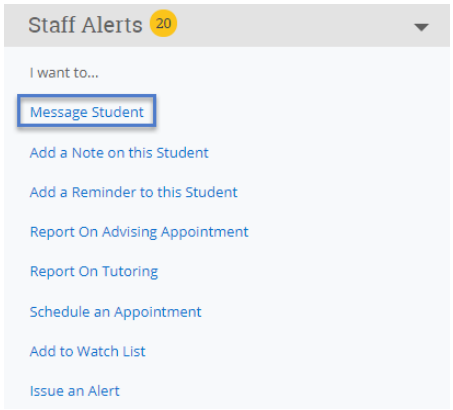




Home: From any Home screen with either students assigned or students enrolled in a course, messages can be issued by selecting the box beside the student's name(s) and choosing the Send Message option from the Actions dropdown. When using this method the student's name and therefore institution-specific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



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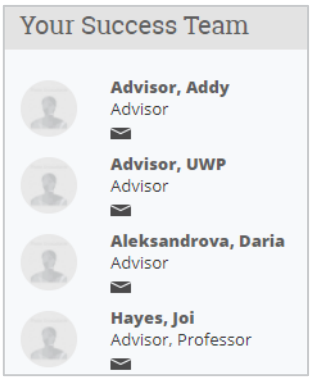
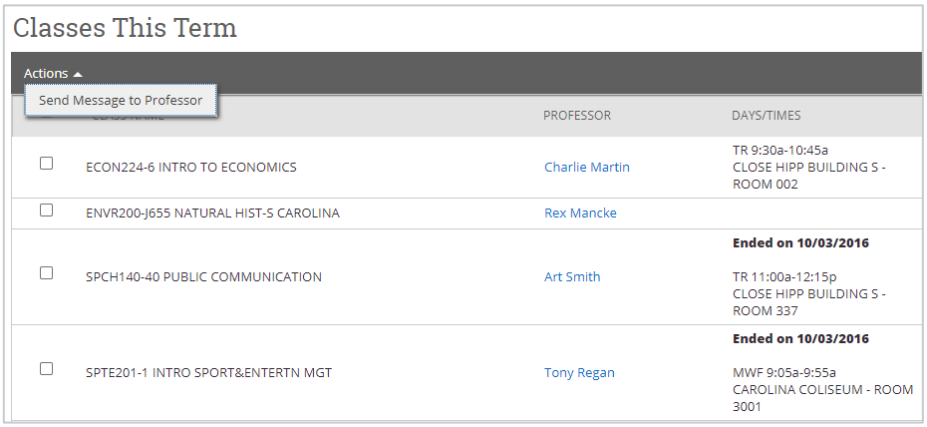
Faculty & Staff

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

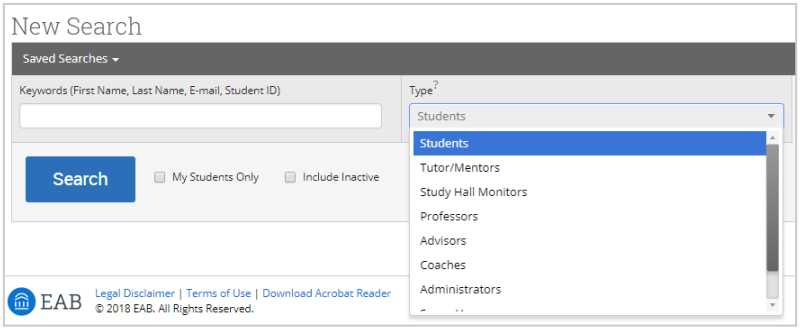
Student's Profile: In order to easily email the advisors, tutors, professors, etc. associated with a specific student then navigate to the student's profile through either the Quick Search or Advanced Search. Scrolling down on the Overview tab there will be a box on the lower right side titled Your Success Team. In this section will be listed any faculty, advisors, and staff who are assigned to this student, from here a user can click on the envelope beneath someone's name to initiate a message to that person's institution email address.



Another easy way to email a student's professors is by navigating to the Class Info tab on their profile. Select the boxes next to the courses for which you wish to email the professor, then navigate to the Actions dropdown and select Send Message to Professor.



Search Results: If you are interested in sending a message to a faculty or staff member but do not know their association with a specific student then navigate to the Search. Change the Type of User from students to either the specific type of user or All Users if you are unsure what category the person would fall under. In the Keyword field search by a first or last name or email address to find the individuals you wish to message. Once the search results generate then you can select the box beside the name(s) and navigate to the Actions dropdown. From the list of Actions, choose Send Message.



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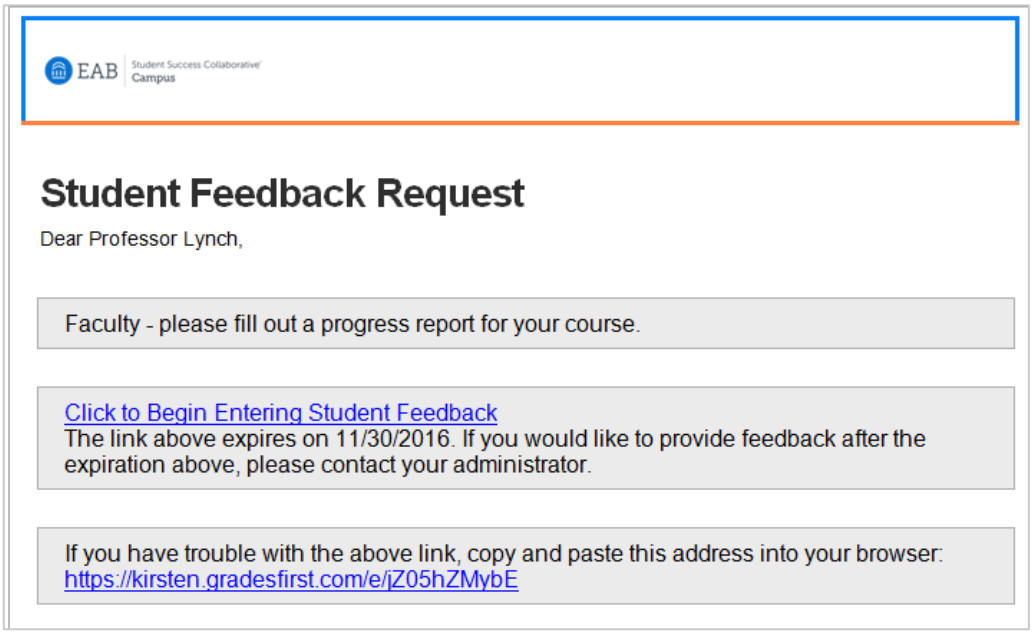
Progress Reports

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:



EAB Student Success Collaborative Campus

Student Feedback Request

Dear Professor Lynch,

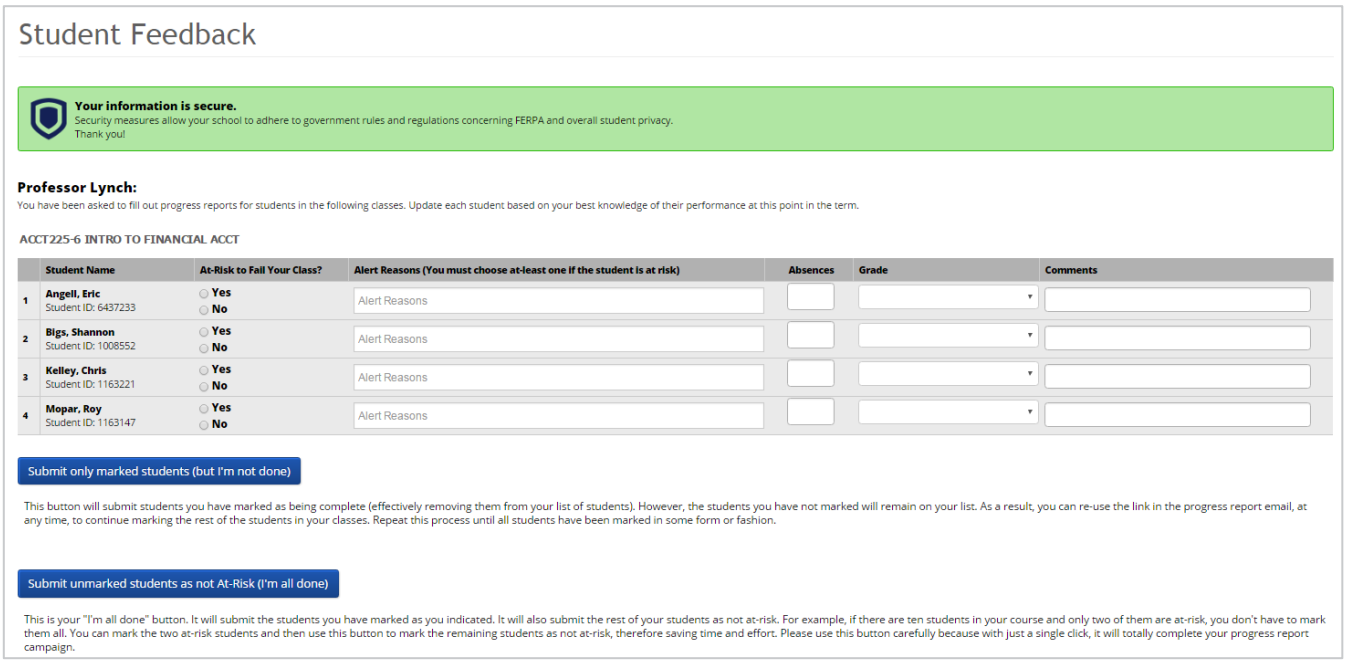
Faculty - please fill out a progress report for your course.

Click to Begin Entering Student Feedback
The link above expires on 11/30/2016. If you would like to provide feedback after the expiration above, please contact your administrator.

If you have trouble with the above link, copy and paste this address into your browser:
https://kirsten.gradesfirst.com/e/jZ05hZMybE

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.



Student Feedback

Your information is secure.
Security measures allow your school to adhere to government rules and regulations concerning FERPA and overall student privacy.
Thank you!

Professor Lynch:
You have been asked to fill out progress reports for students in the following classes. Update each student based on your best knowledge of their performance at this point in the term.

ACCT225-6 INTRO TO FINANCIAL ACCT

	Student Name	At-Risk to Fail Your Class?	Alert Reasons (You must choose at-least one if the student is at risk)	Absences	Grade	Comments
1	Angell, Eric Student ID: 6437233	Yes No	Alert Reasons			
2	Bigs, Shannon Student ID: 1008552	Yes No	Alert Reasons			
3	Kelley, Chris Student ID: 1163221	Yes No	Alert Reasons			
4	Mopar, Roy Student ID: 1163147	Yes No	Alert Reasons			

Submit only marked students (but I'm not done)

This button will submit students you have marked as being complete (effectively removing them from your list of students). However, the students you have not marked will remain on your list. As a result, you can re-use the link in the progress report email, at any time, to continue marking the rest of the students in your classes. Repeat this process until all students have been marked in some form or fashion.

Submit unmarked students as not At-Risk (I'm all done)

This is your "I'm all done" button. It will submit the students you have marked as you indicated. It will also submit the rest of your students as not at-risk. For example, if there are ten students in your course and only two of them are at-risk, you don't have to mark them all. You can mark the two at-risk students and then use this button to mark the remaining students as not at-risk, therefore saving time and effort. Please use this button carefully because with just a single click, it will totally complete your progress report campaign.

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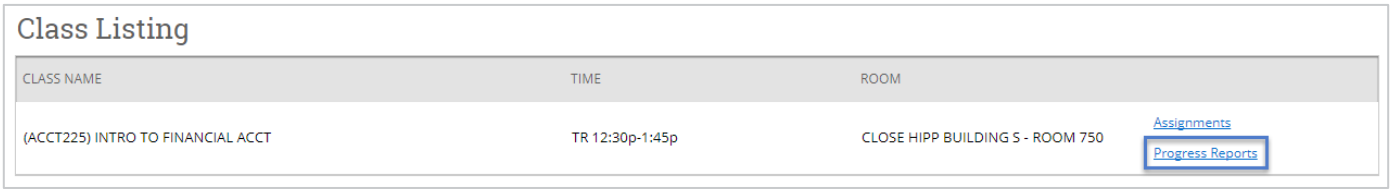
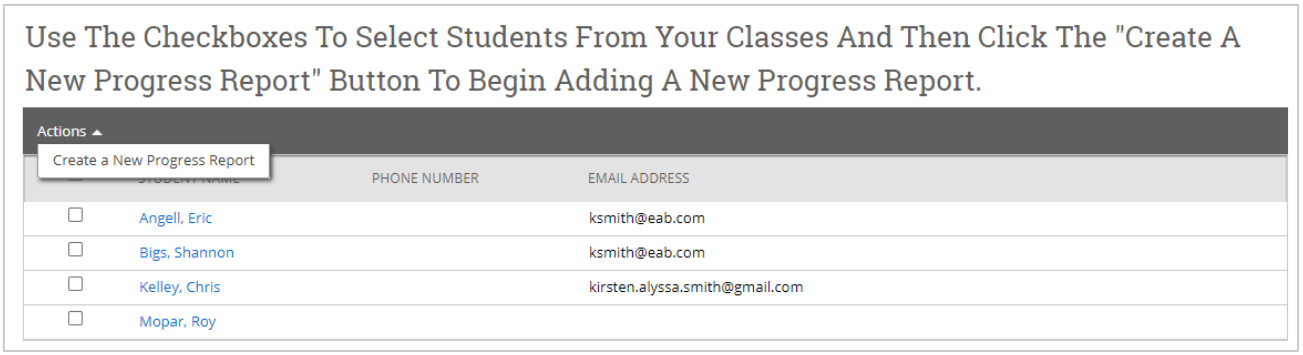
Submitting Ad-Hoc Progress Reports

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

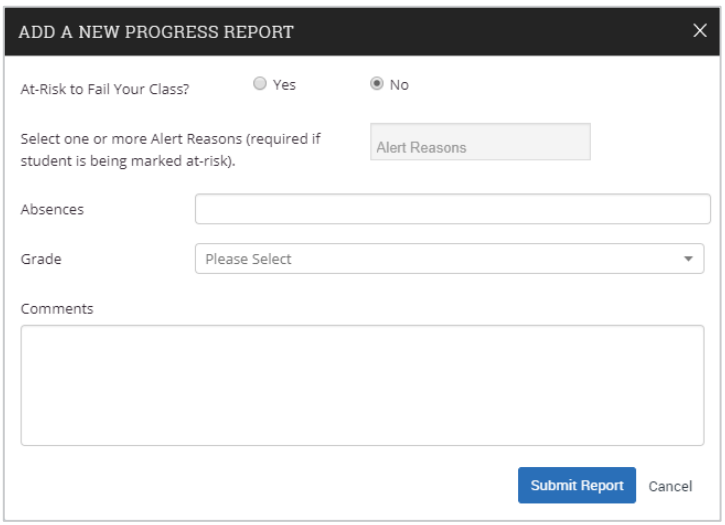
From the Professor Home, click the Progress Reports link beside the course for which you wish to submit a progress report.



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.



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Practice Exercises

Exercises for Exploring Key Areas of the EAB Campus Platform

Setting Up Your Availability

1. **Add availability:** As a new user, the first thing you need to do is set up availability in SSC—Campus so that students can schedule appointments to see you. Typically, you offer time for scheduled advising appointments from 10:30am to 12:30pm on Tuesday, Wednesday, and Thursday and from 3:00pm to 4:00pm on Monday. You also offer drop-in hours from 2:00pm to 5:00pm on Wednesday and Thursday.
    - From the Advisor Home page, navigate to the "My Availability" tab.
    - Click on "Edit Appointment Constraints" and make it so that students need to sign up for appointments at least 6 hours in advance. Set your default appointment length to 30 minutes. Don't forget to save these settings by clicking "Update Constraints."
    - Click on "Add Time" and add the availability as mentioned above. Specify the location where you will offer these hours (e.g., Academic Success Center, CLAS Advising Center) and specify that you want this availability to stay on your calendar for just the current semester. Make sure to use the last field at the bottom of the window to add all student services that you want to offer, so students can sign up for specific services.
2. **Edit Availability:** Your manager has just asked you to provide another 3 hours of drop-in availability in the afternoon on Tuesday.
    - Click "Edit" beside your existing availability for drop-in advising and revise it to include Tuesday.
3. **Copy Availability:** You want to offer another hour for scheduled appointments from 3:00pm to 4:00pm on Friday.
    - Since it is very similar, select your Monday availability and click "Copy time." Switch the day to Friday.
4. **Delete Availability:** A meeting for the Student Support Committee you sit on has just moved to 3:00pm on Mondays and student demand is typically pretty low on Mondays anyway.
    - Select your Monday availability and click "Delete Time" to remove it.
5. **Setting Up Availability for a Campaign:** You've just launched a campaign and want to make sure there is dedicated time for targeted students to make appointments with you.
    - Add two hours of campaign availability whenever you want. The campaign will only run for the next month, so limit the duration to one month from today.

Searching For Students

1. **Simple search:** Simple search enables you to generate a list of users that match some basic criteria: Keywords (e.g., name, email, ID number), Type (e.g., student, tutor, professor), Enrollment Status, and Enrollment Term.
    - Navigate to the search homepage using the fly-out menu on the left side of the screen. The search icon is a magnifying glass.
    - First, use the drop down menus to find all students named "Sam" that were enrolled in Spring 2016. For this search, you would enter "Sam" as your Keyword, "Students" as your Type,

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"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).

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SSC Terminology Cheat Sheet

Advising Request – If a student wants to schedule an advising appointment but cannot find a convenient time, then they can submit an Advisor Request. Advising requests contain the student's availability and preferred location to receive services. Requests appear in the advising home pages, where advisors/tutors can match the requests by scheduling an appointment with the student.

Advising Summary Report – Advising reports enable advisors to document their appointments with students. These forms catalog important information about the appointment (e.g., attendance, time and location, summary commentary) for reporting and display on the "History" tab of a student's SSC—Campus profile.

Note – Notes are used to attach commentary to a student's profile that is not associated with a specific advising appointment. In this way, they are unlike Advising Reports, which are directly associated with an appointment. If you want to indicate that an appointment took place, you should file an ad hoc Advising Report by clicking "Report On Advising" on a student's profile page. This feature retroactively creates an appointment. Notes are currently the only method of attaching a file to a student's profile. Notes display on the "History" tab of a student's profile in a section labelled "Notes About Student."

Progress Report – Progress reports allow faculty to submit in-semester feedback (e.g., current grade, absences) on the progress of students in their courses. By marking a student as at-risk to fail a course in a progress report, faculty can alert student support staff to students who need assistance or may be at risk of leaving the institution. Progress reports are the "early alert" functionality of the SSC—Campus platform. Faculty members can submit progress reports at any time, or student support staff can request progress reports on specific students through the Progress Report Campaign feature. After submission, progress reports and any affiliated alerts or cases will display on the "History" tab of a student's profile.

Report – In the "Reporting" section of the platform, users can view summary reports on the data located in and captured through the SSC—Campus platform. This section contains reports that summarize data on: progress reports, alerts and cases, study hall, student information, student services, tutoring, and advising.

Reason (& Student Service) – Reasons enable your institution to provide a custom, standard list of explanations that categorize actions and documents in the platform. If defined by your institution, reasons can be available to categorize notes, alerts, appointments, and appointment cancellations. Appointment reasons are also called "student services" in certain parts of the platform (e.g., when scheduling an appointment, when filing an advising summary report).

Location – During platform configuration, system administrators define the locations where students receive services that will be managed through the SSC—Campus platform (e.g., Career Center, Academic Support Center, Biological Sciences Tutoring Center, Math Lab). During configuration, administrators also define which student services are offered at each location. When a user schedules an appointment they must choose the student service and location for that appointment.

Case – A case is created when a user issues an alert that requires another user to follow up with a student in order to resolve their issue. For example, when a faculty member submits a progress report and marks a student as "at-risk," a case will typically be opened for an advisor to work with that student. Not all alerts generate cases. The institution can configure which alert reasons automatically generate cases, and to whom the cases are directed. Cases for an individual student display on the "Reports/Notes" tab of the student's profile. All cases (i.e., for any advisor and for any student) display on the Cases homepage, accessed via the left-hand navigation bar. Visibility on the Cases homepage is restricted by user role and permissions.

Category – Categories are system-wide identifiers of students. They are generated and managed by central platform administrators through either data import or mass edit. Users without administrator privileges cannot create a category or assign students to a category. A student can belong to multiple categories. The categories to which a student belongs display at the bottom of the student's Overview page. Users can search for students assigned to a particular category in Advanced Search.

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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.

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