

CRM Advise Information & Common Tasks

Welcome to CRM Advise training. CRM Advise is a tool that we hope will allow advisors, faculty members, and the Student Success team at Delta State in serving the needs of our students.

The system is designed primarily to...

- Identify students who are either currently at-risk (e.g., not in good academic standing) or potentially may be at-risk in the future, so that advisors and student success staff can reach out and provide support.
- Document interactions with students in a central database accessible by all who work with that student.
- Streamline communications with students, engaging them at the key points in their program of study.

It does this by...

- Calculating and maintaining a historical Student Success score, based upon guidelines established by the Student Success Center. These guidelines or scoring rules can be adjusted easily as we learn more about our student population, and specific scoring plans can be created for various student cohorts (e.g., first year students, athletes, education majors, etc...)
- Allowing advisors the ability to add comments, notes, and files to the student's record, available to all others who work with that student. Advisors can track, for example, the outcome of an advising meeting or the phone message left for a student.
- Facilitating engagement lists and alerts. The former to notify students of important information (e.g., an email to students who have not pre-registered by the end of the previous semester), the latter to notify advisors or faculty of issues related to student performance (e.g., a student who receives a D, F, or W at midterms)

Common Questions and Answers

Why do we need this new system? Why can't we just use Banner and/or Canvas?

Banner is designed as a Student Information System – simply a database of information about the student, while Canvas is designed to be a Learning Management System – to conduct courses. CRM Advise is a Customer Relationship Manager – its purpose is to provide exceptional service to our 'customers' by tracking information related to their interactions with us as a University. Neither Banner or Canvas can track this information in the same way CRM Advise can.

So is this going to duplicate all of the information in Banner or Canvas? Do I need to enter things in more places?

As much information as possible is fed into the system from both Banner and Canvas. You will not need to enter anything into Advise that is already in those two system. One benefit of CRM Advise is that it will reduce the amount of duplicated effort across Delta State – eventually housing all information needed about a student, rather than having information spread across various paper and electronic files around the institution.

Do I have to use it?

For a system like CRM Advise to work, it requires all of us to be 'on board' with it. If only a fraction of advisors or faculty use the system, it fails due to lack of information. It is the expectation of the Provost that faculty and advisors will use Advise at least once per week to check on their student's progress, answer alerts, and update documentation.


Who do I talk to if I have questions or feedback?

Delta State's CRM Advise installation is owned and paid for by the Student Success Center. Any suggestions you have for improvements (e.g., adding fields, interface tweaks, etc...) should be directed to Jon Westfall (jwestfall@deltastate.edu) who coordinates First Year Seminar and the Okra Scholars program. If you have issues accessing the system, or issues with your computer while using Advise, please contact the OIT Helpdesk as usual for assistance.

People to know:

Jon Westfall, jwestfall@deltastate.edu, x4501 - Academic coordinator for CRM Advise
Georgia Ryle, gryle@deltastate.edu, x4105 – OIT technical support for CRM Advise
Cheryl Oleis, coleis@deltastate.edu, x4501 – Academic support for CRM Advise

Logging into Advise

1. Using Internet Explorer, Visit <https://pilotadmin.deltastate.edu> from the campus network. Like Banner, Advise access is only available on campus.
2. Log in using your regular username and password – the same that you use to log into your computer.
3. You should be taken to the Advising Dashboard. This dashboard's default view is "My Assigned Primary Advisees" – students who you are listed as the primary advisor for in Banner. You'll notice that the list may contain students who have recently graduated or who are not enrolled this semester. **If you'd like to hide those students, click the arrow  next to "My Assigned Primary Advisees" and change it to "My Assigned Advisees Enrolled Within the Last 6 Months"**
4. To view any student's record, click on their Name under the "Full Name" column.
5. On the Student View screen, you'll see all of the information the system has about that student, including outstanding alerts, and Posts, Activities, and Notes about the student.

Scores: Success versus Course versus Class Grades

You'll notice that each student has a *Success Score* from 0 – 100. These scores are determined by checking a series of rules that deduct points from 100 (e.g., a student who doesn't fit any of the criteria is considered completely on track for success). The most common *Success Score* plan in the system is the *All Student Scoring Plan*, although in the future, these plans can be modified and customized for select cohorts of students (e.g., Freshmen, Athletes, Business Majors, etc..)

The All Student Scoring Plan

- Made up of 5 components:
 - Academic Performance: Has the student been on academic probation within the past year? Have they had an Academic Suspension/Readmit/Override? Have they failed an FYS course?
 - Financial Performance: Does the student have any holds on their account?
 - Semester Performance: Has their previous semester GPA dropped below a 2.0? Have they received a Midterm Grade of D or F this semester? Are their total credits below 15? Do they have an active SOS case?
 - High Risk Enrollment: Is the student enrolled in an 099 (Developmental) course? Are they enrolled in a course with a high DFW percentage?
 - Current Courses on the High DFW List: MAT 099, MAT 104, MAT 131, PSY 101, PSY 302, CIS 205, HIS 103, HIS 201
 - Overall GPA Performance: Is their overall GPA below 3, 2.5, or 2?

Course Scores

Viewing any student's record, you'll notice that they have a *Course Score* for each class they are actively enrolled in. **These scores are NOT grades or percentages.** These scores are generated using a list of rules similar to the Success Scores above. They analyze Canvas data for the current semester and deduct points from a max of 100, indicating certain data present in Canvas (e.g., missing assignments, low percentage on assignments). Because each professor uses Canvas differently, there is no universal rule that we can use to determine actual course percentage. Therefore, the Course Score is a rough estimate of course performance as of the last Canvas data import. Imports are run typically twice a week.

Common Tasks in Advise

Finding a Student by Name

- Type all or part of the student's name in the box labeled "search for records". If it's a common name, you might want to do "lastname, firstname" such as "smith, Ashley"

Advising All Student Access Das... ▾

My Assigned Advisees ▾

900#	Full Name ↑	Success Score ↑	Score Color (S...
No Person records found.			

Finding a Student by 900#



- Click on the Advanced Find button
- Change “Look for:” to “People”
- Click “Select” and choose “900#”, then put the student’s 900# in the box to the right

A screenshot of the 'ADVANCED FIND' interface. The top bar has 'FILE' and 'ADVANCED FIND' tabs. Below are several groups of icons: 'Query' (Query, Saved Views, Results, New, Save), 'View' (Save As, Edit Columns, Edit Properties), 'Query' (Clear, Group AND, Group OR, Details), and 'Debug' (Download Fetch XML). Below the icons is a search bar with 'Look for:' set to 'People' and 'Use Saved View:' set to '[new]'. A dropdown menu is open showing '900#' selected, with 'Equals' and a text box containing '900078979'. A 'Select' button is visible below the dropdown.

- Click “Results” (the red exclamation mark)

Drilling down into Student Success Scores

1. Find a student that you would like to know more about and click on their name.
2. In the “Contact Information” section, click on the value for “Current Success Score Record” – for many students, this says “All Student Scoring plan” and is right below the Current Success score.
3. From there you can see the components of the score under ‘Score Components’ – clicking on any of their descriptions (e.g., Academic Performance) will drill down further to see what risk conditions that student has met that has deducted points from their score.

These scores are still very much in development – if you see a risk condition that you think should remove more points or is removing too many, let us know. Also, if you think some conditions should be there that aren’t, or some conditions should be removed, let us know as well!

Adding a note to a student’s record

- Find the student’s record
- Scroll down to “Posts, Activities, & Notes”

POSTS ACTIVITIES NOTES
All ▾ | Add Phone Call Add Task ...

We didn't find any activity records.

- For quick notes without attachments, simply click “Posts” and start typing in the “Enter post here” box. Click “Post” when done. This is suitable for quick notes such as “student stopped by looking for X” or “emailed asking about PIN number, directed to contact advisor”.

- For longer notes that may have attachments (e.g., a scanned document), click “Notes” and start typing in the box right under “Notes”

POSTS ACTIVITIES NOTES

No Notes found.

- The box will expand and have a space for attaching files. This might be a good space if you have a lot of interaction with a student and need more space than a simple post.

Adding a Phone Call or Task to a student’s record

- If a student calls, speaks with you, and they do not need to be called back, simply go to the student’s record, go down to Activities and choose “Add Phone Call”. From there you can type a description of the call and hit “OK”
- If you’re doing something for a student and would like to document it (e.g., pulling a copy of their records, or have a form for them to sign), click “Add Task” and enter the description. Until completed it will show up in your Open Activities.



Accessing Recently Viewed Students: Click the Recent Views button:

Opening an Activity for Another User

This could be very useful to use instead of additional email clutter. The basic idea is to create an activity (phone call, task, or in the future, alerts), then set the Owner to be another user. So if Karey takes a call for Tom, and needs Tom to call the student back, she can open a New Phone Call, fill in the details, and assign Tom as the owner. When Tom logs in, he’ll see it in his Open Activities list.

To do this, click on the + in the upper right and choose “Phone Call”

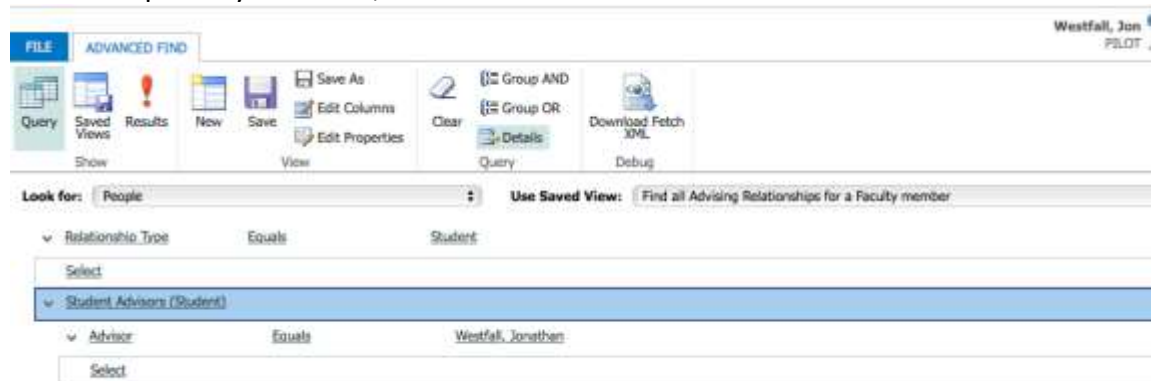
1. Hover over the “Owner”, click the magnifying glass, click outside the box, then hit backspace on your keyboard. The box should now be blank.
2. Enter the name of the person you want to own the task and hit Enter, a list of possible people will pop up. Select the one you want to assign the task to.
3. Enter the Subject.
4. On “Call From”, hover over the field, click magnifying glass, Click outside the box, then press backspace on your keyboard. The box should now be blank. You can now click on the box and type the partial name of a student. Pressing Enter will give a list of possible people to select. This will likely be the same person that will own the activity.
5. In “Call To”, click in the box and type the partial name of the person to call.
6. Fill in the phone number, and description, then click “Save & Close”. The owner will now see this in their list of open activities.

Emailing a Student Directly

1. Find the student's record and open it so that you see their person view.
2. Scroll down to Activities, and click the ... button, then choose "Email"
3. Fill out the new email form and hit "Send"

Emailing a Group of Students with a pre-defined template

1. Create an email template with what you'd like to say. To do that...
 - a. Click on the Gear in the upper right and choose "Options"
 - b. Go to the Email Templates tab.
 - c. Click "New", and in template type, choose "Person"
 - d. Add in a title for your email (So you know what it is)
 - e. Add a description, & subject.
 - f. You can then start writing your email. If you'd like to put in the student's name or other information, click the "Insert/Update" button at the top. Then choose "Add". Then choose "Person" from the Record Type drop down, and the item from the Field drop down. Click OK and then OK again to insert.
 - g. Once you're done, hit "Save & Close"
 - h. Exit out of your Personal Options by choosing OK.
2. Now you can send that email to a group.
 - a. Click the Advanced Find button to the left of your name.
 - b. Change "Look For" to "People"
 - c. Use a saved view, or build a new view. For example, to get a list of your advisees, click "select" then choose "Relationship Type", set that equal to "Student". Then choose "Select" again and choose "Student Advisors (Student)". It will indent slightly and you'll see another "Select" link – click on that and choose "Advisor". Set that equal to your name, and click "Results"



- d. Select the students you'd like to send the email to from the list and choose "Send Direct Email".
- e. Find your email from the Person Templates.
- f. Click 'Send'

Emailing a Group of Students with a new message

1. Click the Advanced Find button to the left of your name.
2. Change “Look For” to “People”
3. Use a saved view, or build a new view. For example, to get a list of your advisees, click “select” than choose “Relationship Type”, set that equal to “Student”. Then choose “Select” again and choose “Student Advisors (Student)”. It will indent slightly and you’ll see another “Select” link – click on that and choose “Advisor”. Set that equal to your name, and click “Results
4. Select the students you’d like to send the email to from the list and choose “Quick Engagement”, then “For selected students” (Or the other 2 options if that’s applicable). Click “Next”, give it a name of your choosing, than choose “Email”. Click “Next” and you’ll get a screen that will allow you to send an email to those students manually or you can select a template.

Adding a Manual Alert for a Student

1. Click on the Student’s name to bring up their page.
2. Scroll down to the Activities block, and click the three dots (ellipses) next to “Add Task” – choose “Alert” from the dropdown box that appears.

NOTES

all Add Task

of class meetin

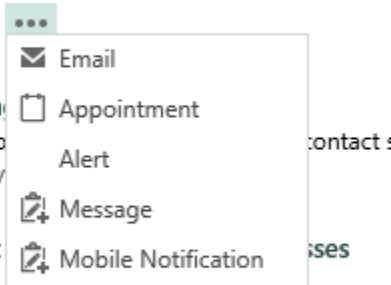
nished 60% or mo

Westfall, Jon 11/

Student not yet

/4/2016 1:00 AM

SYSTEM 11/4/2016 1:01 AM



3. On the Alert screen that pops up, enter a Subject, Message, and Severity.
4. If you’d like another user to take action on the alert, change the Owner from yourself to that user (To do so, click on the Owner’s bar to highlight it (usually clicking to the right of the last name works), then hit Backspace on your keyboard to clear it out – you can then type a few letters of that user’s name to search for them).
5. Hit “Save” – the alert is now manually opened and assigned to the owner for followup.