

# Instruction Manual for Passport

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**NAVIGATE** Summer 2020

# Jane E. Student

**A.** Search for individual students  
**B.** Need help? Easily access the Help Center

**C.** Overview  
**D.** Success Progress  
**E.** History  
**F.** Class Info  
**G.** Major Explorer  
**H.** More

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	Cumulative GPA
0	0	0	0	3.586

Total Credits Earned: 84.00  
 Credit Completion % at this Institution: 99%

**Marine Engineering Technology**  
 Bachelor of Science Engineering Technology

STUDENT ID: 001234567  
 CLASSIFICATION: Junior

**Current Alerts** 0

I want to...

- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report on Appointment
- Create Request for Appointment
- Schedule an Appointment
- Add to Watch List
- Issue an Alert

**Student Info**

Email: [jstudent@csu.edu](mailto:jstudent@csu.edu)  
 Home: 707-555-5555  
 Cell: 707-555-5551

**Links**


- FERPA Permissions - Paper Form
- FERPA Permissions - Electronic Form
- Curriculum Sheets
- Advisor Handbook
- Catalog

**C.** See a student's progress in the Overview tab  
**D.** View notes about a student in the History tab  
**E.** See a student's class schedule, instructors and unofficial transcripts in the Class Info tab  
**F.** Access links to see a student's FERPA permissions, the advisor handbook, and more  
**G.** Look up a student's email and phone number  
**H.** Directly message a student, or add a note on your meeting

**\*Access to certain features may be determined by a user's permission level.**

## Add a Student Note

On a student's profile page, on the right hand side of the screen, select "Add a Note on this Student".



**Current Alerts** 0

I want to...

- Message Student
- Add a Note on this Student**
- Add a Reminder to this Student
- Report on Appointment
- Create Request for Appointment
- Schedule an Appointment
- Add to Watch List
- Issue an Alert






Edit User Settings

Impersonate User


Add a note (referencing the guidelines below). You can select a note reason or leave the option blank. By default, students will not be able to see notes. If you would like them to see the note, please select the box listed under Visibility. Attachments can be included. Once the note is completed, select "Save Note". To reference your note later, select History tab on the student's profile page.

ADD A NOTE TO STANLEY THE CAT

Note (Required)

**B** **I**    Paragraph  

**Note Subject**

 Stanley The Cat -


**Relations**

**Note Reason**

Note URL

**Visibility**

Stanley The Cat?

 Attach File  No file chosen

Cancel



## Do's and Don'ts for Creating Notes

The Passport advisor notes promote effective communication between various departments. Advisor notes protect you as a professional and the student in case information provided or received was wrong or misunderstood. The notes serve as documented records and are included in the students' electronic file.

### Guidelines:

- **Record only the facts.** DO NOT include anything that contains information that is personal, confidential, financial, American Disabilities Act (ADA), and/or other sensitive material.
- **Be concise.** Notes should summarize your meeting and allow other advisors to quickly get a glimpse of what topics were discussed.
- If you are unsure if you should include specific information, **consult w/ your supervisor or department chair.** You can always add another note, but you *cannot remove* a note that was already submitted.
- **Be informed** of the Family Educational Rights and Privacy Act (FERPA) guidelines and updates.

The categories below contain examples of academic related notes versus notes that contain too much personal/sensitive information.

 <b>Correct</b>	 <b>Incorrect</b>
Student dropped Course XXXX and plans to take it over the summer. Referred student to course equivalency form.	Student dropped Course XXXX because they don't want to wake up early. Student will take the course over the summer.
Student called to confirm that they signed up for the appropriate course. Explained how to navigate to academic requirements report. Reminded student to file for graduation by the appropriate deadline and referred them to check w/ major and minor departments.	Student heard rumors around campus that the course that they are signed up for does not fulfill academic requirements. Reviewed course with student and confirmed the course will fulfill degree requirements.
Student wanted to know more about GWE. Discussed test dates and prerequisites. Referred to SEAS webpage for test taking tips.	GWE
Discussed Early Alert and academic progress with the student. Referred student to multiple resources.	Student came in to discuss early alert and multiple classes they are failing. Student indicated they have XXXX disability and they were connected to DSO.
Discussed smart plan with student during their advising appointment and confirmed targeted graduation date.	Student was late to advising appointment and did not come prepared as instructed. Discussed smart plan.
Met with student to discuss numerous absences. Discussed resources available on campus and referred student to tutoring and University Advising.	Student misses class all the time and when in class plays on their phone. Met with student and referred them to resources.

## Issue an Alert

Staff or faculty can issue an alert on a student at any time. Alerts are a way to notify a department of a student who might need additional support for a variety of reasons (i.e. attendance concerns, financial aid questions, tutoring support, etc.). Below are some examples of reasons staff or faculty may issue an alert for a student and the department that receives the alert:

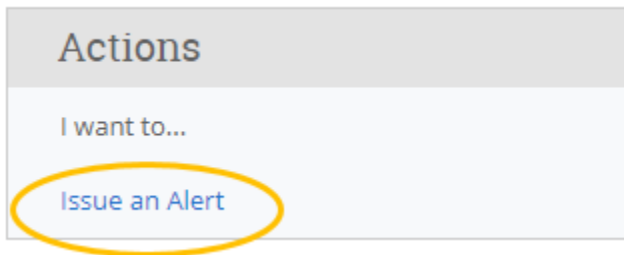
- Academic and Resources Support (University Advisors)
- Attendance Concern (University Advisors)
- Basic Needs (Student Engagement)
- Financial Aid
- Social or Engagement Concern (Care Team – confidential)
- Tutoring Support (Tutoring Coordinator)

### Issuing an Alert on a Student (see below for issuing alerts on a list of students)

To issue an alert, log into your [Passport](#) account. Once logged in, search for the student you'd like to issue the alert for using the magnifying glass icon in the upper right corner.



On the student's overview page, select the blue "Issue an Alert" link under menu on the right side.



Select the reason for the alert and if the alert is regarding a specific course (optional). Add comments and details that will be helpful for the assigned department to know when they reach out to the student.

**Please remember!** Any information saved in The Passport is part of the student's official file, and can be pulled at any time for audit purposes.

Once you have completed the alert form, click submit, and the alert will be sent to the assigned department for follow-up.

ISSUE AN ALERT
✕

Student Stanley The Cat

Please select the reason you believe this student needs assistance

x Academic and Resources Support (University Advisors)

Is this alert associated with a specific class? Optional

Additional Comments

Stanley would like help getting organized, and would like to discuss time management tips.

Cancel Submit

### Issuing Multiple Student Alerts

The Passport lets users issue mass alerts for up to 100 students at a time. The alerts will generate one alert per student. This feature is available in Staff Home (My Students), Professor Home, Advanced Search, Reporting, and other drop-down menus where you are able to issue a single alert from the Actions menu.

Professors and Faculty Advisors can also select students from their class or advisee list.

### Students In My Classes

Actions ▲

NAME
CATEGORY
AT RISK?

No students found

Issue Alert
Send Message
Schedule Appointment
Create Appointment Summary
Tag
Note

### My Assigned Students For Summer 2020

Actions ▲

NAME
CATEGORY
AT RISK?

o	Catalog Term - Fall 2016, Class of 2020, Division 1E, Expect Grad Term - Summer 2020, Grad Candidate -Summer 2020, Undergraduate	No
d	Catalog Term - Fall 2017, Class of 2021, Division 2E, Expect Grad Term - Spring 2021, Undergraduate	No

Issue Alert
Send Message
Schedule Appointment
Create Appointment Summary
Tag

If multiple students are selected, the pop-up window will be similar to the one for issuing a single alert. There are two main differences. First, you will see "Issuing Alert for X Students" with a link to show a list of all the students. The other difference is there should be no course selection drop-down.

Note that if you click **Show All** and you no longer want to see all students, you can click **Collapse All** to hide the list.

### Alert Outcomes

Once the department responsible for the alert has reached out and given the resources needed, they will close the alert, or “case”. There are four case outcome reasons:

- Student contacted – no response
- Student received support
- Referral received (used for sensitive departments like Financial Aid, who cannot disclose whether the student is receiving aid, etc.)
- Student contacted – stated no support needed

Reason(s): Academic and Resources Support (University Advisors)

Outcome:

Comment:

**Choose**

Student contacted- no response

Student received support

Referral received

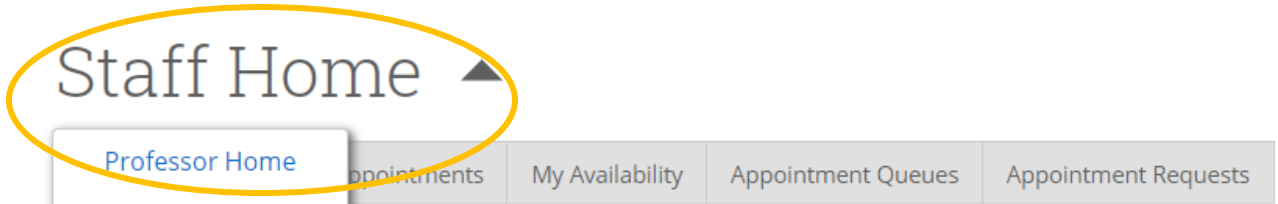
Student contacted- stated no support needed

[Go Back](#) [Submit](#)

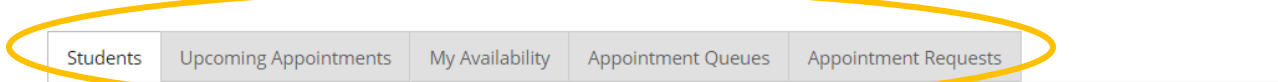
When the case is closed, an email will be sent to the original alert issuer, notifying them that the case has been closed.

## Viewing my Staff Home Page vs. Professor Home Page

Professors can toggle between Staff Home and Professor Home using the arrow below to access different features.



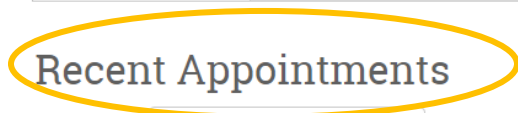
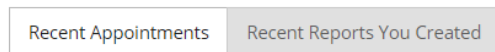
The **Staff Home** page includes detailed tabs: Students (your advisees), Upcoming Appointments, My Availability, Appointment Queues, and Appointment Requests, in addition to overview boxes (Actions, Quick Links, and Upcoming Appointments) containing high-level information.



### My Assigned Students for Summer 2020 ▾

Actions ▾					
<input type="checkbox"/> ALL	STUDENT NAME ▾	ID	WATCH LIST ⚡	CUMULATIVE GPA ⚡	CONCERN LEVEL ⚡
No matching records found					

## Reporting



Actions ▾								Show Cancelled
<input type="checkbox"/>	DATE	SERVICE ⚡	COURSE	COMMENT	ATTENDEE	TIME ⚡	REPORT FILED? ⚡	DETAILS

The **Professor Home** page includes all of your classes, students in your classes, and assigned students (advisees) if you are an advisor, as well as any student alerts you've issued to another department (see **"Issue an Alert"** for instructions on how to use alerts!).



# Professor Home ▼

## Class Listing

CLASS NAME	TIME	ROOM
------------	------	------

## Students In My Classes

Actions ▼				
<input type="checkbox"/>	INDEX	STUDENT NAME	CATEGORY	AT RISK?
No students found				

## My Assigned Students For Summer 2020

Actions ▼				
-----------	--	--	--	--

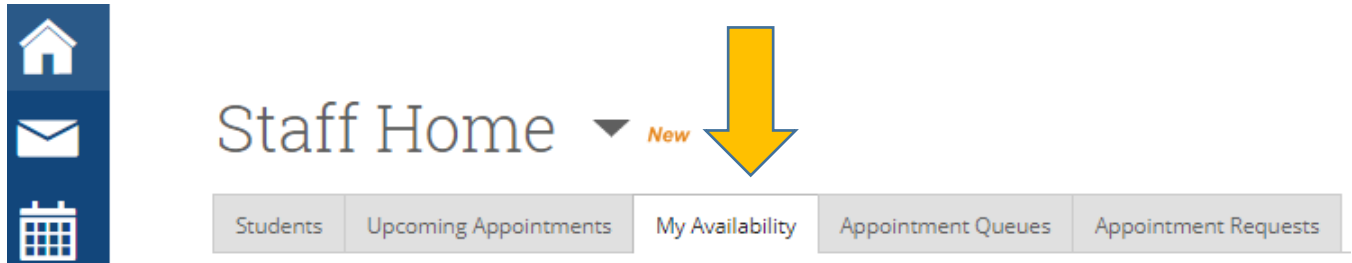
## My Issued Alerts

ISSUE DATE	STUDENT	ALERT REASONS	CASES	PROGRESS REPORT
You have not issued any alerts.				

## Setting up My Availability for Appointments and Office Hours

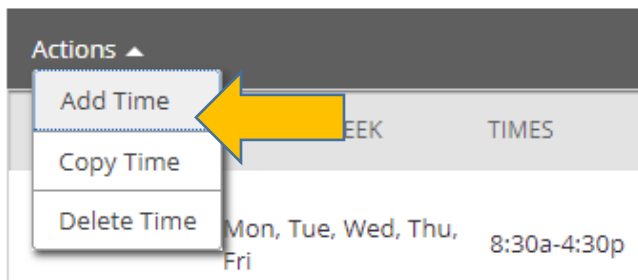
To allow students to schedule appointments with you and/or view your drop-in (office) hours, follow the below instructions to set up your availability in “The Passport”.

Go to the “My Availability” tab on your Home page.



Click on the “Actions” dropdown menu and select “Add Time” to set up times you are available.

## Times Available



\*To edit your current availability, select the blue “edit” link. Be sure to update each semester.

## Available Times

SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
<input type="radio"/>	Mon, Tue, Wed, Thu	1:00p-4:00p	Forever	Advising and Student Support	Academic Advising, Resources For: Appointments/Drop-Ins/Campaigns	Advising	<a href="#">Edit</a>
<input type="radio"/>	Tue, Thu	9:00a-11:00a	Forever	Advising and Student Support	Academic Advising, Resources For: Appointments/Campaigns	Advising	<a href="#">Edit</a>
<input type="radio"/>	Mon, Wed, Fri	9:00a-12:00p	Forever	Advising and Student Support	Academic Advising, Resources For: Appointments/Campaigns	Advising	<a href="#">Edit</a>
<input type="radio"/>	Fri	1:00p-3:30p	Forever	Advising and Student Support	Academic Advising, Resources For: Appointments/Campaigns	Advising	<a href="#">Edit</a>

The “Add Availability” window will open, and you can set your availability for appointments and/or drop-ins:

- Select the days and times when you are available to meet with students.
- Select whether you will meet with students via appointments, campaigns or drop-ins during that time (Recommended - Select all types of appointments for your availability: Appointments, Campaigns, Drop-Ins).
- Select a care unit (your department).

- Choose your location (your department/area of expertise).
- Select which student services you will provide to students during this availability. (**\*Please note** - leaving this student services field empty means you will appear to be available for all student services at the selected location.)
- **VIRTUAL FEATURE!** URL/Phone Number: can be left blank, or you can input the best way to reach you! **Zoom link** or phone number will appear in the appointment instructions a student makes.
- Under special instructions for students, let students know how they can reach you!
  - You can list your building and office number, or virtual zoom link!
- Update the “Max Number of Students per Appointment” if needed (1 is the default).
- Click the “Save” button, and you’re done!

You can repeat this process until all of your availabilities have been defined. You can have as many availabilities as needed.

MODIFY AVAILABILITY

When are you available to meet?

Mon	Tue	Wed	Thu	Fri	Sat	Sun
-----	-----	-----	-----	-----	-----	-----

From  To

How long is this availability active?

What type of availability is this?

Appointments	Drop-ins	Campaigns
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Care Unit

Location

Services

URL / Phone Number ⓘ

Special Instructions for Student

**B** *I*

We've gone virtual! Let's connect through zoom, or if phone call works better, email me your contact info!  
[kloera@csum.edu](mailto:kloera@csum.edu)

My personal zoom link:  
<https://csum.zoom.us/j/5527032411>

Will you be meeting with multiple students?

*These settings will not be used for kiosk and campaign purposes.*

Max Number of Students per Appointment

Once you have set up your availability, students will have access to make appointments with you, or view your drop-in hours.

### Set Up for staff utilizing “Kiosk Mode” Notifications

**\*Only needed if you have an iPad/tablet kiosk set up in your building.**

Go to the “Appointment Queues” tab on your “Staff Home” page and select the “Email” box under the Notification Methods. This will ensure you are notified if a student has selected to meet with you at the building’s kiosk station and will notify you, whether you have The Passport open or not.

## Staff Home ▼

Notification Methods:  Ding  E-mail  Text Message

Students will also appear in your Appointment Queue if they have checked into the Kiosk and are waiting to be seen:



NAVIGATE



## Appointment Queue

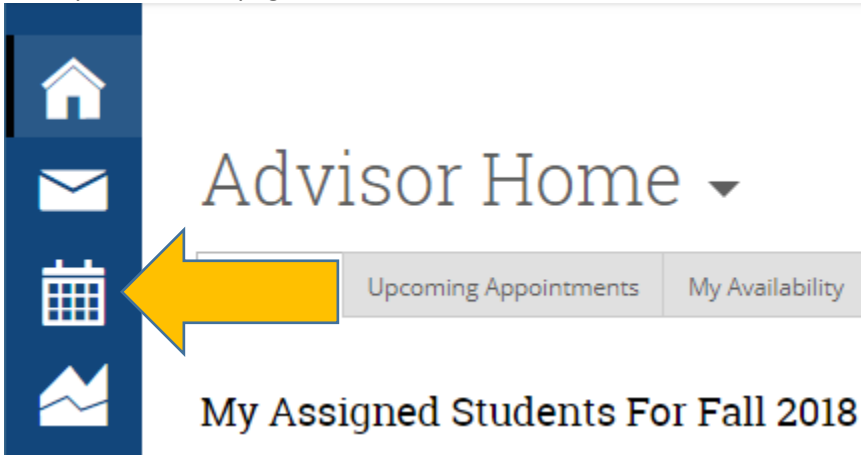
You have no students in your queue.

## Sync Your Outlook Calendar

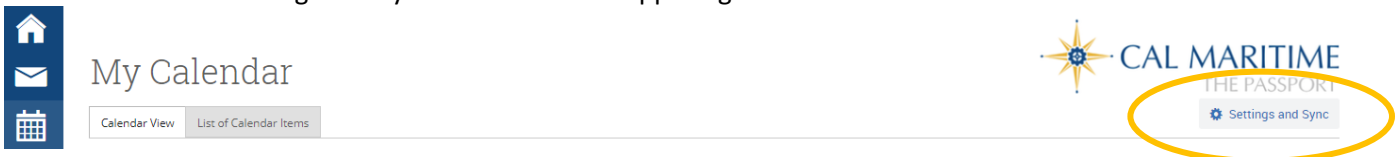
Faculty and Staff using “The Passport” to schedule appointments directly with students, or allowing students to schedule with them, will find it beneficial to sync their Outlook calendar with The Passport to ensure that their Passport calendar will be blocked as “busy” when they have Outlook appointments, and vice versa. Below are instructions are for setting up integration between Outlook calendar and The Passport.

### Let’s get started!

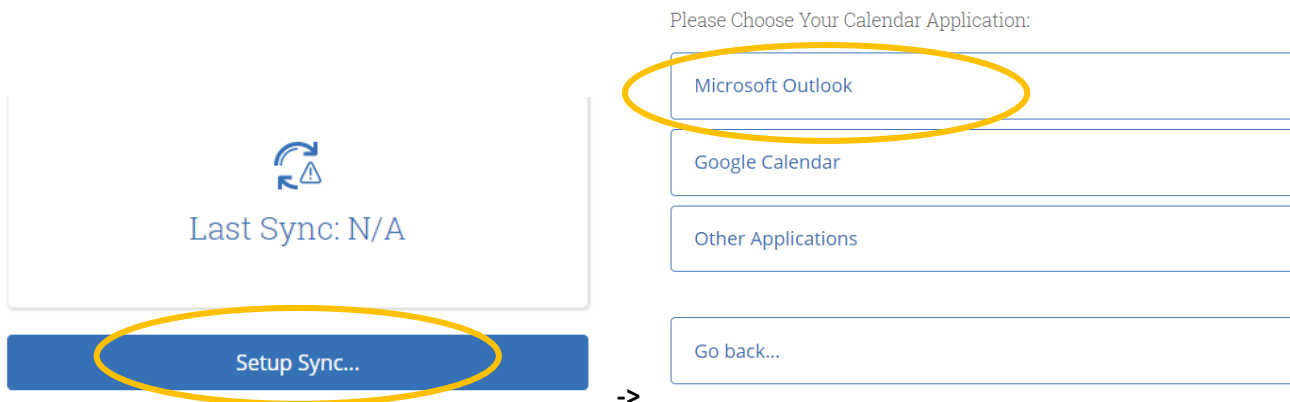
From your “Home” page, click on the calendar icon:



Then click on the “Settings and Sync” button on the upper right side:



Click the blue “Setup Sync...” button, then proceed to the next page and select “Microsoft Outlook” option.



Then select the Outlook Service Accounts option:

Choose Sync For Microsoft Outlook:

Outlook Service Accounts  
Will be deprecated in 2020.

Go back...

The Passport will connect with your Outlook Exchange calendar and will start to sync both calendars automatically. It can take a few minutes for both calendars to sync. We recommend refreshing after a few minutes to see if your calendar sync is complete.

Once your calendars have been synchronized, you will receive a confirmation that looks like the below:

Outlook Service Accounts: kloera@csum.edu



Last Sync: 08/08/2019 At 10:29  
AM

Retry Sync...

Disconnect Sync...

When you go back to your calendar icon, you will see your calendar reflects not only your appointments made in The Passport, but also your appointments in your Outlook calendar.

Please note – The Passport will **not** show the details for appointments made in Outlook, but will reflect that you are “Busy” during that time.



# My Calendar



Calendar View List of Calendar Items

Settings and Sync

Course  Assignment  General  Busy  Cancelled

Print Calendar (PDF) Add Calendar Event

## August 2019

today < day week month >

SUN	MON	TUE	WED	THU	FRI	SAT
28 8am Busy	29 7am Busy 8am Busy 11:30am Busy	30 8am Busy 8am Busy 10am Busy 2pm Busy 5:30pm Busy	31 8am Busy 8am Busy 9am Busy 11am Busy 2pm Busy	1 8am Busy 11am Busy 11am Busy 2pm Busy	2 8am Busy 9am Busy 10am Busy 11am Busy	3
4	5 7am Busy 8am Busy 8am Busy 12pm Busy	6 8am Busy 8am Busy 11am Busy 8:45am Busy 9am Busy 9am Busy 1pm Busy 2pm Busy	7 8am Busy 8am Busy 9:30am Busy 11am Busy 12pm Busy 4:30pm Busy	8 8am Busy 8:30am Busy 10am Busy 11am Busy 2pm Busy	9 8am Busy 2pm Busy	10

### Additional FAQ's for integrating your calendars:

- If an appointment was created in Outlook, it can only be edited/cancelled in Outlook, and vice versa (if an appointment was created in The Passport by you or a student, it can only be edited/cancelled through The Passport).
- It is recommended to only sync your calendars once, so as not to create duplicate appointments.
- You can only choose one calendar to sync with The Passport. If you are trying to sync multiple calendars, there will be errors and it will not be successful.
- While your instructor course schedule automatically shows up in your Passport calendar, it is unable to show in your Outlook calendar, even if you sync your calendars, as this is a Passport only feature.
- Tentative, busy, and away Outlook appointments all sync as "Busy" on your Passport calendar.
  - If you mark your Outlook calendar with Office hours as "busy" it will block the students from making an appointment in the Passport since Passport will read your calendar as unavailable.
  - **As a best practice**, we usually recommend marking any open drop-in/office hours on your calendar as "free" (not "busy"). This will allow it to show on Outlook, but will not block the time in Passport, and students from making an appointment.
- For any questions or assistance, please email us at [advisor@csum.edu](mailto:advisor@csum.edu).



## FERPA: Permission to talk with a Parent, Spouse, or Named Other

The Family Educational Rights and Privacy Act of 1974 (FERPA) and CSU Maritime Academy protects the privacy of student educational records and generally limits access to the information contained in those records by third parties.

Students may choose to grant California State University Maritime Academy permission to disclose educational records to certain individuals in accordance with FERPA and University policy.

### REMEMBER:

- When a student begins attendance at a post-secondary institution (regardless of age), the student holds these rights directly, and parents lose their right of access to their children's education records.
- Students may choose to grant permission to disclose educational records to certain individuals by completing the **PeopleSoft online form**.
- Students must indicate the “type” of information permitted to share:
  - Academic Records (i.e. verbal confirmation of grades, GPA, academic status)
  - Student Financial Services (i.e. fee balance)
  - Financial Aid
  - Admissions
  - Housing
  - All Departments
- The named individual the student has given permission to **MUST** confirm their four-digit PIN (listed in PeopleSoft) before you can release any information regarding a specific student.

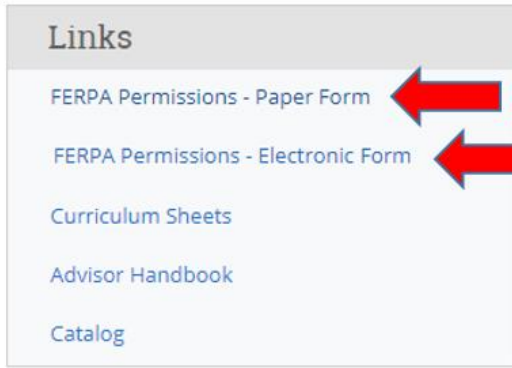
### Viewing FERPA Permissions

The Passport can be accessed from the Cal Maritime home page menu, or directly at <https://thepassport.campus.eab.com/>. Use your Cal Maritime single sign-on to log into your account. Once logged in:

- Search the student you are looking for by clicking the small magnifying glass in the upper right corner, then type in the student's name.



- Once on the student's profile, scroll down to the “Links” section (on the right side).
- You will see two FERPA Permissions links - “Paper Form” and “Electronic Form”. **You will need to check both areas to confirm if a student has completed the manual paper form to give permission, or has submitted the electronic authorization form.**



- The “FERPA Permissions - Paper Form” link will take you to the “Relationships” page in PeopleSoft. Once there, type in the student’s name. If “no matching values were found”, the student did not complete a paper form giving permission for anyone to access their records.

### Relationships

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

ID begins with

Relationship Nbr =

National ID begins with

Campus ID begins with

Last Name begins with

First Name begins with

Relationship =

Include History  Correct History  Case Sensitive

[Basic Search](#)

No matching values were found.

- On the manual form, if permission is given, there are three types of information an individual can be privy to: academic, discipline, and financial information. You must click on the name of the person seeking information and confirm they have access to academic information before you can speak with them about a student’s academic progress.

Relationships | Relationship Address | Relationship Detail

Relationship Find | View All First 1 of 1 Last

\*Effective Date: 08/07/2013 \*Status: Active

Related ID: \*Relationship: Mother

\*Name:

Prefix: Suffix:

Sex: Marital Status: \*Guardian: N/A

NID Country: USA NID Type: PR National ID:

Comment: Academic, Discipline and Financial Information.

Biographical Details Legacy Communication Recipients Joint Communication Management

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Relationships | Relationship Address | Relationship Detail

- Return to your Passport account and click on the “FERPA Permissions - Electronic Form” link. This will link you directly to the student’s “Authorization to Release Info” page and will show if permission was given.

No permission given:

Information Release Accounts									
	Last Name	First Name	Access Code	Academic Records	Student Financial Services	Financial Aid	Admissions	Housing	All Departments
1				×	×	×	×	×	×

Named person given permission (areas specified):

Information Release Accounts									
	Last Name	First Name	Access Code	Academic Records	Student Financial Services	Financial Aid	Admissions	Housing	All Departments
1	Full name of person (s)		PIN	✓	✓	✓	✓	✓	✓
2				✓	✓	✓	✓	✓	✓

- As academic faculty, it is expected that you will only be speaking, when permission is granted, regarding academic matters. Please ask the individual you speak with to confirm their pin. This ensures you are speaking with the right person. Please contact your department chair, academic dean, or the Office of the Registrar if you should have any questions.

## FERPA – Permission to talk with a Parent, Spouse, or Named Other

### Family Educational Rights and Privacy Act (FERPA):

- Protects the privacy of student **education records** (any info directly related to a student, collected by and maintained by the university) and generally limits access to the information contained in those records by third parties.
- Ensures students have a right of access to their own education records.
- **REMEMBER:** When a student turns 18 **or** begins attendance at a post-secondary institution, the student holds these rights directly, and parents lose their right of access to their children's education records.

### FERPA Permissions:

- Students may choose to grant permission to disclose educational records to certain individuals by completing the PeopleSoft online form.
- Students must indicate the “type” of information permitted to share:
  - Academic Records (i.e. verbal confirmation of grades, GPA, academic status)
  - Student Financial Services (i.e. fee balance)
  - Financial Aid
  - Admissions
  - All Departments
  - Housing
- To verify which individuals are authorized access to a specific student’s information, you will need to confirm that they are listed on the student’s authorization to release Peoplesoft page.
- For information on how to access the Relationship page, see pg. 18-19 of the [Advising Handbook](#) (available on the Office of the Registrar webpage). Make sure to ask them to confirm the four-digit access code to ensure you are speaking with the correct person (listed in Peoplesoft).

### Examples of education records include:

- Admissions information (HS transcripts, test scores, etc.)
- Grades, test scores, evaluations, course work and course communications
- Internship program records
- Disciplinary records
- Financial aid records and other financial information
- Work-study program records (timecards, etc.)

### Examples of non-educational records:

- Alumni records
- Employment records when employment is **not** contingent on being a student

## General Appointment Campaigns

In this document, the following topics will be covered:

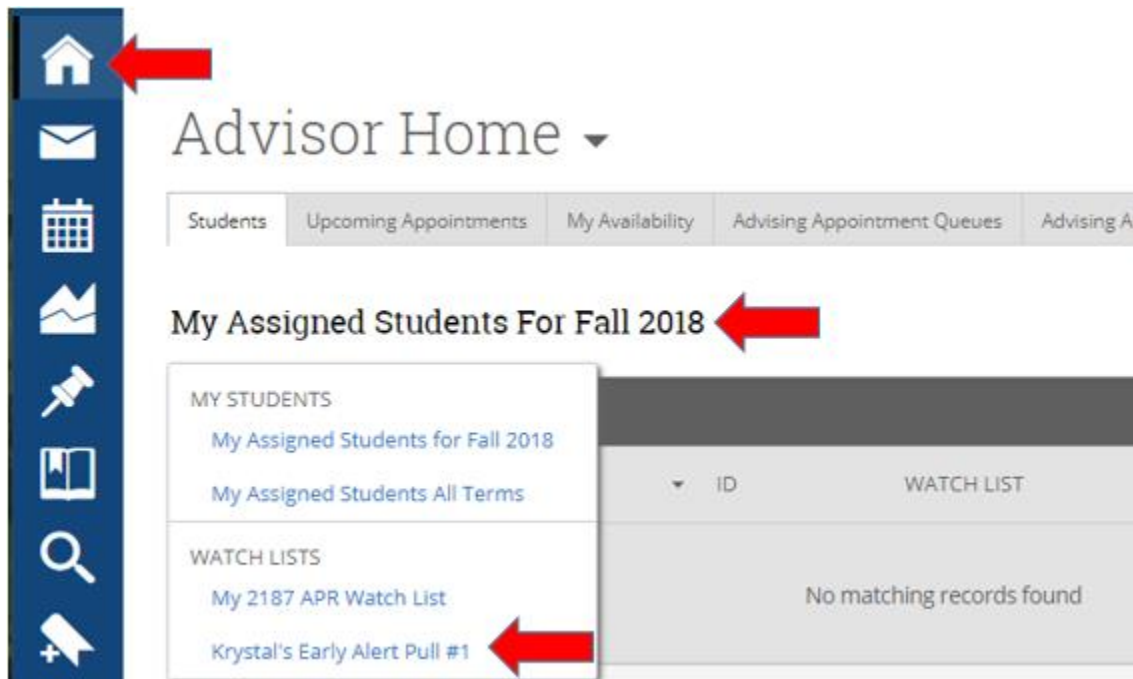
- a. Setting Up and Sending a Campaign
- b. Resending a Campaign to Non-Responders
- c. Appointment Summaries

### Remember:

- Be sure to set up your availability, specifically for “Campaigns”, in your “My Availability” tab on your Staff Home page.
- Don’t forget to sync your Outlook or Google calendar with your Passport calendar so appointments do not conflict between the two systems.

### Setting Up and Sending a Campaign:

- Save or upload your list of students you’d like to reach out to (make sure uploads include student ID and are in .CSV format).
- From your Home page, select the “My Assigned Students For Fall 2018” dropdown, then under “Watch Lists” select your list of students for your campaign you either saved or uploaded (i.e. Krystal’s Early Alert Pull #1).



- Once you are in your saved list, select the “All” box to choose all of your students, then choose the “Actions” dropdown and select “Appointment Campaign.”

Krystal's EA Pull #1\_10.09.18 ▾

Actions ▾					
<input checked="" type="checkbox"/> ALL		STUDENT NAME	ID	CATEGORY	AT RISK?
<input checked="" type="checkbox"/>	1	Anyaoha, Nneka	002920598	Catalog Term - Fall 2017, Class of 2021, Division 4M, Undergraduate	No
<input checked="" type="checkbox"/>	2	Aquillino, Nicholas	002850411	Catalog Term - Fall 2015, Class of 2019, Division 1E, Undergraduate	No
<input checked="" type="checkbox"/>	3	Atain, Jacob	002912083	Catalog Term - Fall 2017, Class of 2021, Division 1E, Undergraduate	No

The screenshot shows a vertical toolbar on the left with icons for a pushpin, a book, a magnifying glass, a satellite, and a pulse line. To the right, a dropdown menu is open, listing several actions: 'Send Message', 'Advising Appointment Report', 'Appointment Campaign' (highlighted with a red arrow), 'Schedule Tutor Appointment', 'Schedule Advising Appointment', and 'Schedule General Appointment'. The background shows a table with student information, similar to the one above.

- You will then define your Campaign requirements/details – location, duration, appointment length, etc.
- **IMPORTANT!** : Be sure to name your campaign with our campus campaign naming convention:
  - Term + Name of Your Campaign + Your Last Name:
    - EX: 2193 Early Alert Pull #1 Loera
    - EX: S19 Probation 1st Meeting Loera

Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

Campaign Name: <input type="text" value="My First Campaign"/>	Begin Date: <input type="text" value="12/12/2018"/>	End Date: <input type="text" value="12/26/2018"/>
Care Unit: <input type="text" value="Advising"/>	Appointment Limit: <input type="text" value="1"/>	
Location: <input type="text" value="Lab Building (Advising and Student Support)"/>	Appointment Length: <input type="text" value="30 min"/>	
Service: <input type="text" value="Academic Advising"/>	Slots Per Time: <input type="text" value="1"/>	

- Be sure to select yourself as the advisor for the campaign. If you do not see yourself as an available advisor, then you have not set up your availability for campaigns and need to do so in your “My Availability” tab.

Add Advisors To Campaign

Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	Katie Hansen	<b>Appointment Availability:</b> Mon-Fri 8:30am-4:30pm
<input checked="" type="checkbox"/>	Krystal Loera	Mon-Fri 8:30am-4:30pm

- You can then compose your email message that will go out to all students on your list.
  - **IMPORTANT!** : Be sure to leave the { \$student\_first\_name } and { \$schedule\_link } so that it’s personalized and it sends the schedule an apt. link to the student.

- Scroll to the bottom to review your final message and send!

Preview Email   Preview Landing Page

**Andrew, You Have A Class Reported At Risk!**

Please Schedule Your Advising Appointment.

**Hello Andrew:**

I wanted to reach out to you to see how I can best support you in your courses. We are currently in week eight and your current grade report shows you are at risk of not passing one or more of your courses.

You will be receiving a letter and email from the Academic Dean with this information as well, but I wanted to personally make sure you received the support and resources needed to help improve your grade.

Below is a link to schedule an appointment with me. Please make sure to schedule a time within the next two weeks.

Tutoring and academic resources can be found at <https://www.csum.edu/web/university-advising/home/tutoring-resources>.

I look forward to meeting with you.

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser:

[< Back](#) Save and Exit [Continue](#)

Confirm & Send

<b>Campaign Type:</b> Advising Appointment	<b>Start Date:</b> 10/09/2018	<b>End Date:</b> 10/19/2018
<b>Reason:</b> Early Alert	<b>Appt Length:</b> 30 minutes	<b>Slots Per Time:</b> 1
<b>Appt Location:</b> The Lab Building (Advising and Student Support)	<b>Appt Limit:</b> 1	<b>Reminders:</b> <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> SMS

**Subject** {\$student\_first\_name}, you have a class reported at risk!

**Email Preview** [View](#)      **Invitees:** [View All \(28\)](#)      **Included Advisors** [View All \(1\)](#)

**Resending a Campaign to Non-Responders**

Best Practice: After sending out your campaign, it is recommended to resend out appointment requests to non-responders. To do this, click on the campaign icon and select the Appointment Campaigns tab to view your active campaigns. Once in the campaign, select the Appointments Not Yet Made tab and resend your campaign.

Appointment Campaigns > 2207 Not Reg 4.1.2020

04/01/2020 - 06/24/2020

Appointments Made   **Appointments Not Yet Made**   Reports Created   Eligible Appointments

**Actions** ▲

- Resend Appointment Request**
- Send a Message
- Add Note
- Add Tag

**Appointment Summaries**

Once your campaign has been sent out and students begin attending their appointments, it will be important to fill out appointment summaries to track attendance and keep record of what topics were discussed during your student meetings (Please see Do's and Don'ts for Creating Notes).

On the Staff Home Page, under the Reporting section, select your recent student appointment to fill out an appointment summary, or if the student did not show, you can also mark no-show.

## Reporting

The screenshot shows the 'Reporting' interface. At the top, there are two tabs: 'Recent Appointments' and 'Recent Reports You Created'. Below the tabs is the 'Recent Appointments' section. A 'Care Unit' dropdown menu is set to 'All care units'. Below this is a table with columns: SERVICE, COURSE, COMMENT, ATTENDEE, TIME, REPORT FILED?, and DETAILS. An 'Actions' dropdown menu is open over the table, with 'Add Appointment Summary' circled in yellow. Other options in the menu are 'Mark No-Show' and 'Issue Alert'. A 'Show Cancelled' button is visible in the top right of the table area. Below the table, a message states: 'You have not had any recent appointments in the last 90 days.'

Tip: If a student on the campaign shows up without an appointment, you can fulfill their appointment by filling out an appointment summary on the student's profile page and linking it to the campaign.

The screenshot shows the 'Current Alerts' menu. The menu title is 'Current Alerts' with a yellow circle containing the number '0'. The menu items are: 'I want to...', 'Message Student', 'Add a Note on this Student', 'Add a Reminder to this Student', 'Report on Appointment' (circled in yellow), 'Create Request for Appointment', 'Schedule an Appointment', 'Add to Watch List', 'Issue an Alert', 'Edit User Settings', and 'Impersonate User'.

Appointment Details will already be filled out. Just enter notes in the appointment summary.



## Appointment Details

### Appointment Campaign

2207 Not Reg 4.1.2020

### Care Unit

Advising

### Location

Advising and Student Support

### Service

University Advising

### Course

Start typing to search all courses

### Meeting Type

Select Meeting Type

### Date of visit

06/22/2020

### Meeting Start Time

1:19pm

to

### Meeting End Time

All times listed are in Pacific Time (US & Canada).

## Attendees



### Katie Hansen

Administration, Advisor, Professor, Super User, Tutor

Attended

## Summary Details For

### Topic Discussed

## Appointment Summary

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Paragraph

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Rich text editor area for the Appointment Summary.

## Attachments

📎 Attach File

Choose File

No file chosen



An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

## Academic Advising Campaigns

In this document, the following topics will be covered:

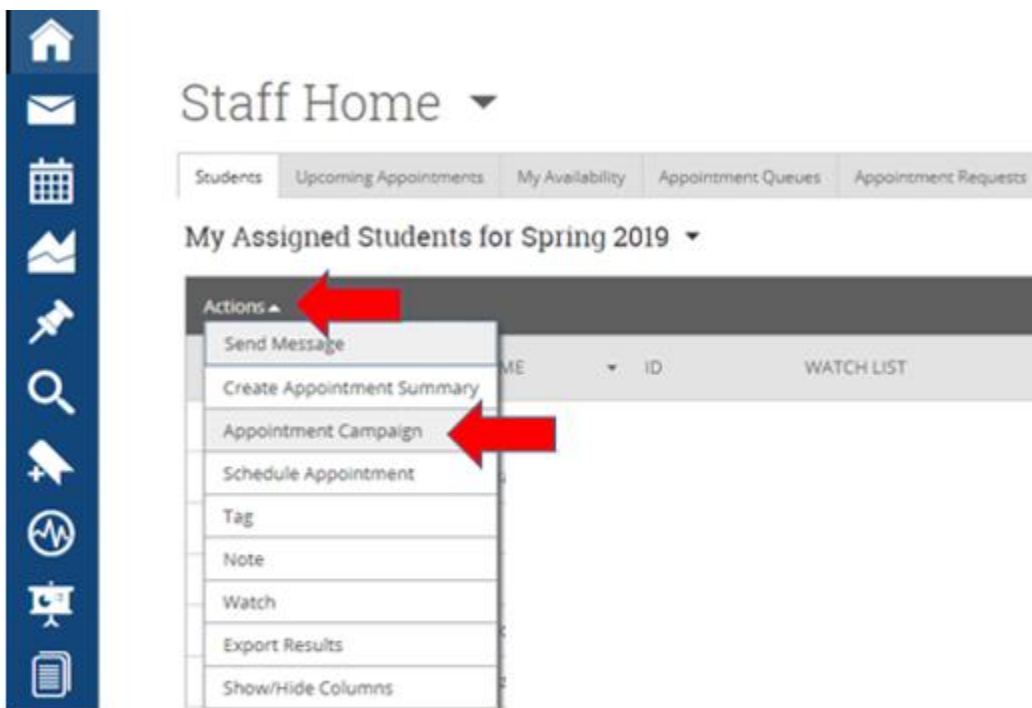
- a. Setting Up and Sending a Campaign
- b. Resending a Campaign to Non-Responders
- c. Appointment Summaries

### Remember:

- Be sure to set up your availability, specifically for “Campaigns”, in your “My Availability” tab on your Staff Home page.
- Don’t forget to sync your Outlook or Google calendar with your Passport calendar so appointments do not conflict between the two systems.

### Setting Up and Sending a Campaign

- On your Staff Home page, you will see your advisees listed under “My Assigned Students for [Current Term].” From there, select all of your students by checking the “ALL” box, then click on the “Actions” dropdown, and select “Appointment Campaign.”
- **Please note** – if you are not seeing the Appointment Campaign option under actions, then you have **not** set up your availability to include Campaigns. Go to your “My Availability” tab and add availability for Campaigns, then this option will show.



- You will then define your Campaign requirements, identifying your office location, the dates you’d like the students to come see you, appointment time length, etc.
- **IMPORTANT!** : Be sure to name your campaign with our campus campaign naming convention:
  - **Term + Name of Your Campaign + Your Last Name:**
    - EX: 2203 Advising Meeting Loera
    - EX: S20 Advising Campaign Hansen

## Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

Campaign Name: <input type="text" value="My First Campaign"/>	Begin Date: <input type="text" value="12/12/2018"/>	End Date: <input type="text" value="12/26/2018"/>
Care Unit: <input type="text" value="Advising"/>	Appointment Limit: <input type="text" value="1"/>	
Location: <input type="text" value="Lab Building (Advising and Student Support)"/>	Appointment Length: <input type="text" value="30 min"/>	
Services: <input type="text" value="Academic Advising"/>	Slots Per Time: <input type="text" value="1"/>	

- On the “Review Students” page, you can review all of the students you are sending your Appointment Campaign to, or remove any students if needed.
- On the “Add Staff” page, be sure to select **yourself** as the advisor for the campaign. If you do not see yourself as an available advisor, then you have not set up your availability for campaigns and need to do so in your “My Availability” tab on your Staff Home page.

## Add Advisors To Campaign


Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	<b>Katie Hansen</b>	<b>Appointment Availability:</b> Mon-Fri 8:30am-4:30pm
<input checked="" type="checkbox"/>	<b>Krystal Loera</b>	Mon-Fri 8:30am-4:30pm

- You can then compose your email message that will go out to all students on your list.
  - **IMPORTANT!** : Be sure to leave the {`$student_first_name`} and {`$schedule_link`} so that your message is personalized and it sends the appointment link to the student.
- Scroll to the bottom to review your final message, click continue and send!

[Preview Email](#) [Preview Landing Page](#)

### Andrew, You Have A Class Reported At Risk!



Please Schedule Your Advising Appointment.

**Hello Andrew:**

I wanted to reach out to you to see how I can best support you in your courses. We are currently in week eight and your current grade report shows you are at risk of not passing one or more of your courses.

You will be receiving a letter and email from the Academic Dean with this information as well, but I wanted to personally make sure you received the support and resources needed to help improve your grade.

Below is a link to schedule an appointment with me. Please make sure to schedule a time within the next two weeks.

Tutoring and academic resources can be found at <https://www.csum.edu/web/university-advising/home/tutoring-resources>.

I look forward to meeting with you.

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser:

[< Back](#)

Save and Exit

[Continue](#)

- You can review your Appointment Campaign at any time to see who has or has not made an appointment to see you. Click on the Campaign Icon on your left menu, select the “Appointment Campaigns” tab, then select your Appointment Campaign.

Spring 2019 Campaigns

Progress Report Campaigns | Enrollment Censuses | Appointment Campaigns

Filter by care unit: All care units

NAME	STATS
2193 Early Alert Pull 1 Hansen ADVISING 02/25/2019 - 03/16/2019	Appts. Made (48%)
2193 Early Alert Pull 1 Loera ADVISING 02/25/2019 - 03/16/2019	Appts. Made (37%)

- You can also resend your Appointment Campaign to any students who have not yet made an appointment with you, to remind them to do so. Click on the “Appointments Not Yet Made” tab, select all students, then select “Resend Appointment Request”.

Appointment Campaigns > 2193

02/25/2019 - 03/16/2019

Appointments Made | Appointments Not Yet Made | Appointments Created | Eligible Appointments

Actions

- Resend Appointment Request
- Send a Message

### Resending a Campaign to Non-Responders

Best Practice: After sending out your campaign, it is recommended to resend out appointment requests to non-responders. To do this, click on the campaign icon and select the Appointment Campaigns tab to view your active campaigns. Once in the campaign, select the Appointments Not Yet Made tab and resend your campaign.

Appointment Campaigns > 2207 Not Reg 4.1.2020

04/01/2020 - 06/24/2020

Appointments Made | Appointments Not Yet Made | Reports Created | Eligible Appointments

Actions

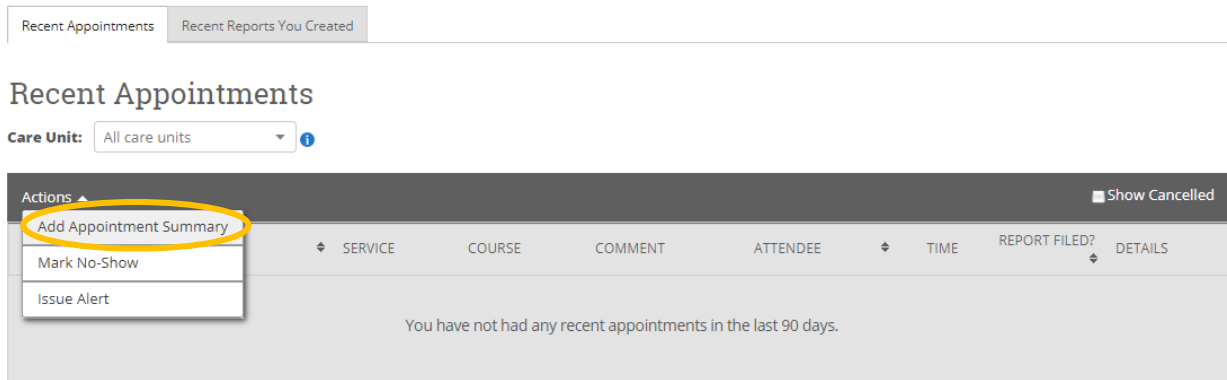
- Resend Appointment Request
- Send a Message
- Add Note
- Add Tag

## Appointment Summaries

Once your campaign has been sent out and students begin attending their appointments, it will be important to fill out appointment summaries to track attendance and keep record of what topics were discussed during your student meetings (Please see Do's and Don'ts for Creating Notes).

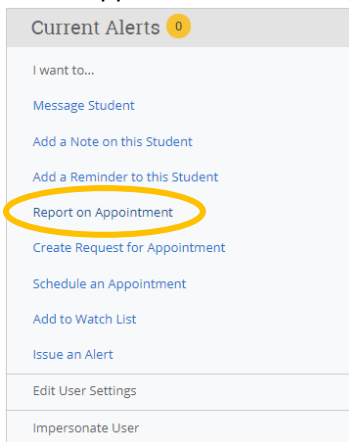
On the Staff Home Page, under the Reporting section, select your recent student appointment to fill out an appointment summary, or if the student did not show, you can also mark no-show.

## Reporting



The screenshot shows the 'Reporting' section with two tabs: 'Recent Appointments' and 'Recent Reports You Created'. Below the tabs is a 'Care Unit' dropdown menu set to 'All care units'. The main area displays a table with columns: SERVICE, COURSE, COMMENT, ATTENDEE, TIME, REPORT FILED?, and DETAILS. An 'Actions' dropdown menu is open, showing options: 'Add Appointment Summary' (circled in yellow), 'Mark No-Show', and 'Issue Alert'. A message at the bottom of the table states: 'You have not had any recent appointments in the last 90 days.'

**Tip:** If a student on the campaign shows up without an appointment, you can fulfill their appointment by filling out an appointment summary on the student's profile page and linking it to the campaign.



The screenshot shows the 'Current Alerts' section with a notification badge showing '0'. Below the header is a list of actions: 'I want to...', 'Message Student', 'Add a Note on this Student', 'Add a Reminder to this Student', 'Report on Appointment' (circled in yellow), 'Create Request for Appointment', 'Schedule an Appointment', 'Add to Watch List', 'Issue an Alert', 'Edit User Settings', and 'Impersonate User'.

Appointment Details will already be filled out. Just enter notes in the appointment summary.

## Appointment Details

### Appointment Campaign

2207 Not Reg 4.1.2020

### Care Unit

Advising

### Location

Advising and Student Support

### Service

University Advising

### Course

Start typing to search all courses

### Meeting Type

Select Meeting Type

### Date of visit

06/22/2020

### Meeting Start Time

1:19pm

to

### Meeting End Time

All times listed are in Pacific Time (US & Canada).

## Attendees



### Katie Hansen

Administration, Advisor, Professor, Super User, Tutor

Attended

## Summary Details For

### Topic Discussed

## Appointment Summary

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Paragraph

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Rich text editor area for the appointment summary.

## Attachments

📎 Attach File

Choose File

No file chosen



An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

## Advanced Search

The Advanced Search, as shown below, gives users a chance to search for a wide variety of options such as students in a major, earned number of units, cumulative GPA, catalog year and many more. Once you have entered your search criteria, click the Search button.

### Search

#### New Search

The screenshot shows the 'New Search' interface. At the top, there is a 'Saved Searches' dropdown menu. Below it, there are two input fields: 'Keywords (First Name, Last Name, E-mail, Student ID)?' and 'Type?' with a dropdown menu currently set to 'Students'. The interface is divided into several sections, each with a title and a list of search criteria: 'Student Information' (First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List), 'Enrollment History' (Enrollment Terms), 'Area of Study' (College/School, Degree, Concentration, Major), 'Term Data' (Classification, Section Tag, Term GPA), 'Performance Data' (GPA, Hours, Credits), 'Course Data' (Course, Section, Status), 'Assigned To', and 'Success Indicators' (Concern Level, Success Markers). At the bottom, there is a blue 'Search' button, which is circled in yellow, and three checkboxes: 'My Students Only', 'At-Risk Students Only', and 'Include Inactive'.

Once you complete a search, you can select the students from your search and choose from the following actions:

The screenshot shows a dropdown menu titled 'Actions'. The menu items are: 'Send Message', 'Create Appointment Summary', 'Appointment Campaign', 'Schedule Appointment', 'Tag', 'Note', 'Mass Print', 'Issue Alert', 'Charity', 'Watch', 'Export Results', and 'Show/Hide Columns'.

Some popular options are:

- Send a Message- You can send a message that will directly email all students on the list.
- Watch- Saves your advanced search list to Passport for easy access in the future.
- Export Results- Download your list to Excel sheet.



## Upload Student Lists

If you have a specific list of students you would like to either have saved under your Staff Home page, or would like to send a mass message or invite to make an appointment with you, The Passport allows users to upload Excel lists into the platform to create “Student Lists”. Below are the steps to upload your own list to The Passport.

1. Be sure to save your Excel file as a .CSV file.
2. Log into [The Passport](#) platform.
3. On the left sidebar, select the “Lists and Search” Icon.



4. In the Actions menu of Student Lists, select “Upload Student List”.

## Watch Lists

Actions		New Watch List	
	NAME		# OF STUDENTS
Rename			
Delete			
Upload Watch List	My 2187 APR Watch List		20

5. Create your New Student List, title your list, then select the file and upload it.

Select a Watch List    Upload    Choose a Column    Complete

### Upload File to Watch List

Choose a list to add these students to

- My 2187 apr watch list
- Krystal's ea pull #1\_10.09.18
- New Watch List**

6. Choose the column that represents Student ID and then finish the import.

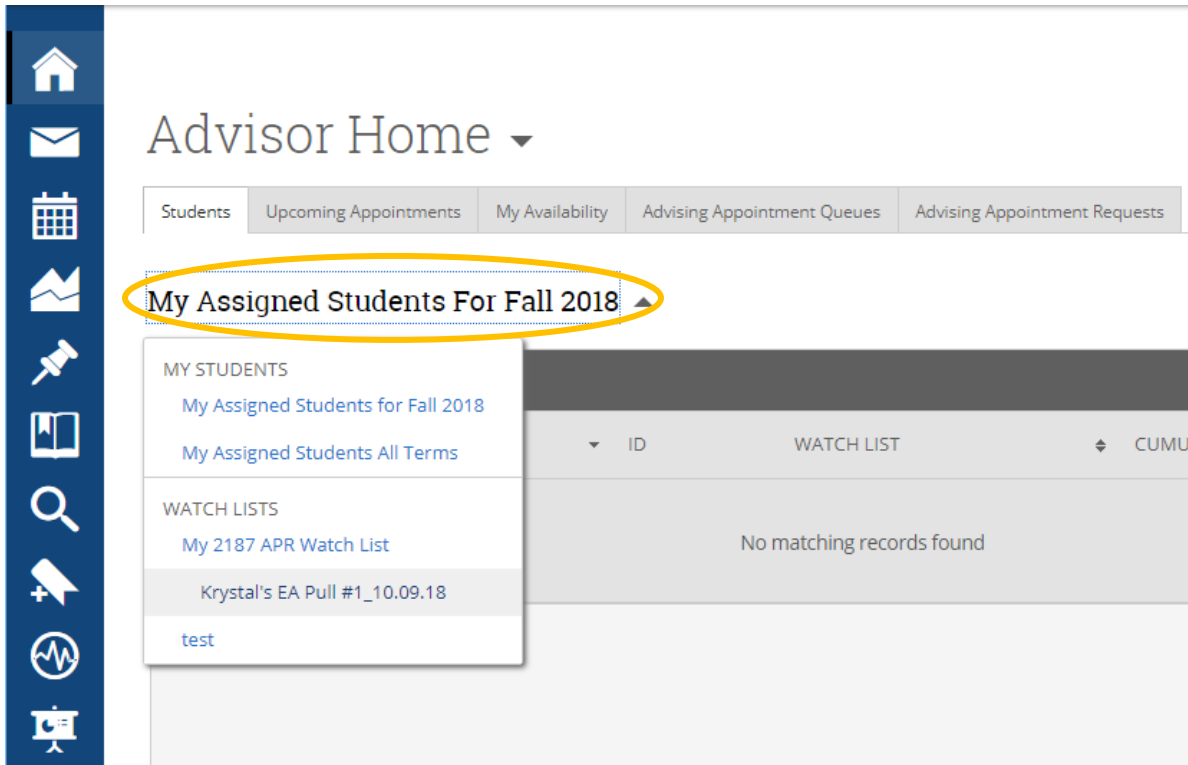
Select a Watch List    Upload    Choose a Column    Complete

### Upload File to Watch List

You've uploaded *Krystal's\_Early\_Alert\_Pull\_\_1\_10.09.18.csv* Choose a column to import as Student ID:

- Assign To
- ID**
- Name
- Couse
- Course Name
- Class Nbr
- Group Name
- Acad Plan
- Advisor
- Instructor
- Student Email

7. You will then see your saved list under your Home page – select the “My Assigned Students” dropdown and your list will appear under “Student Lists”.



Once you've uploaded your student list, you can select the students from your list and choose from the following actions:

