

Instruction Manual for The Passport

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Student Profile Key Features

STUDENT PROFILE KEY FEATURES IN THE PASSPORT

Callout A: QUICK SEARCH FOR INDIVIDUAL STUDENTS

Callout B: ACCESS THE HELP CENTER FOR QUESTIONS

Callout C: SEE A STUDENT'S OVERALL PROGRESS IN THE OVERVIEW TAB

Callout D: VIEW NOTES ON A STUDENT IN THE HISTORY TAB

Callout E: USE THE CLASS INFO TAB TO SEE A STUDENT'S CLASS SCHEDULE, INSTRUCTORS, AND UNOFFICIAL TRANSCRIPTS

Callout F: ACCESS HELPFUL LINKS LIKE FERPA PERMISSIONS, THE ADVISOR HANDBOOK, AND MORE

Callout G: LOOKUP STUDENT INFO FOR EMAIL AND PHONE NUMBER

Callout H: DIRECTLY MESSAGE STUDENT OR ADD A NOTE ON YOUR MEETING

Student Profile Data:

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	Cumulative GPA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

Marine Engineering Technology
Bachelor of Science
Engineering Technology

STUDENT ID: 001234567
CLASSIFICATION: Junior

Student Info

Email: jstudent@csu.edu
Home: 707-555-5555
Cell: 707-555-5551

Current Alerts

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

Links

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

Please note, access to some features may be determined by a user's permission level.

Adding a Note

To record notes on a student meeting or interaction, go to the student's profile page using the "Quick Search" bar.



Once on the student's profile page, select "Add a Note on this Student", which can be found on the right-hand side of the student page.

Record any details you'd like to keep track of. You have the option of selecting a "Note Reason" (which can be pulled in reports using the Advance Search tool later) or you can leave the note reason blank.

By default, students will not be able to see notes. If you want a student to be able to see their note on the meeting, please select the student's name under "Visibility". Attachments can also be included in notes.

Once the note is completed, click "Save Note". To reference your note later, go to the student's profile page and click on the "History" tab. You'll see all notes published on a student here.

The “Do’s” and “Don’ts” for Creating Notes

The Passport “Add A Note” feature promotes effective communication between the various departments that help our students. Notes can support with holistic advising and help in situations where information provided was misunderstood by the student. Notes serve as documented records and are included in the students’ electronic file, so it’s important to follow the below guidelines when creating a student note.

Guidelines:

- **Record only the facts.** Don’t 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 an idea 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.

Correct	Incorrect
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 the 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.

Issuing an Alert

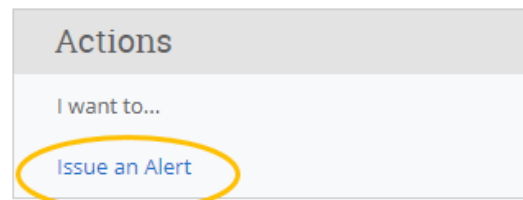
Staff or faculty can issue an alert on a student at any time. Alerts notify a department of a student who might need additional support for a variety of reasons. Below are some examples of reasons staff or faculty may issue an alert for a student and the department that receives the alert:

- Academic and Resources Support (University Advisors)
- Attendance Concern (University Advisors)
- Basic Needs (Student Engagement)
- Financial Aid (Financial Aid)
- Social or Engagement Concern (Care Team – confidential and cannot be seen by any other dept.)
- Tutoring Support (Tutoring Coordinator)

To issue an alert, first search for the student you'd like to issue the alert for using the "Quick Search" bar at the top of the page.



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



Select the reason/department for the alert from the pre-populated list. You can specify a course if the alert pertains to a specific class (i.e. tutoring support – EGL 300). Finally, include any details that will be helpful for the assigned department to know when they reach out to the student under "Additional Comments".

REMEMBER! All information saved in The Passport is part of the student's official electronic file and can be pulled at any time for audit purposes.

ISSUE AN ALERT

Student Stanley The Cat

Please select the reason you believe this student needs assistance

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

Once you have completed the alert, click "Submit" and the alert will be sent to the assigned department for follow-up via email.

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:

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

Outcome: Choose

Comment:

Choose

Student contacted- no response

Student received support

Referral received

Student contacted- stated no support needed

Go Back Submit

Once the alert has been "closed", the issuer of the alert (probably you) will receive an email notification. You can review any notes on the case under the History tab on the student's profile page.

Issuing Multiple Student Alerts

The Passport also 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 under Staff Home (My Assigned Students), Professor Home, Advanced Search, and other drop-down menus where you are able to issue a single alert from the Actions menu.

Students In My Classes

Actions

- Send Message
- Schedule Appointment
- Create Appointment Summary
- Issue Alert
- Tag
- Note

NAME	CATEGORY	AT RISK?
No students found		

My Assigned Students For Summer 2020

Actions

- Send Message
- Schedule Appointment
- Create Appointment Summary
- Issue Alert
- Tag

NAME	CATEGORY	AT RISK?
	Catalog Term - Fall 2016, Class of 2020, Division 1E, Expect Grad Term - Summer 2020, Grad Candidate -Summer 2020, Undergraduate	No
	Catalog Term - Fall 2017, Class of 2021, Division 2E, Expect Grad Term - Spring 2021, Undergraduate	No

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. Second, there is no option for course selection when issuing an alert for multiple students.

ISSUE ALERT ✕

Issuing Alerts for 4 Students. [\(Show all\)](#)

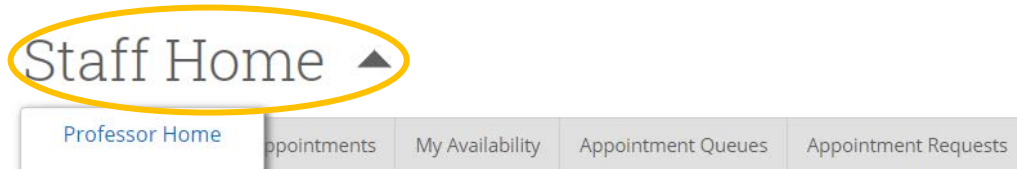
Please select a reason for this alert

Additional Comments

Cancel Submit

Staff Home vs. Professor Home

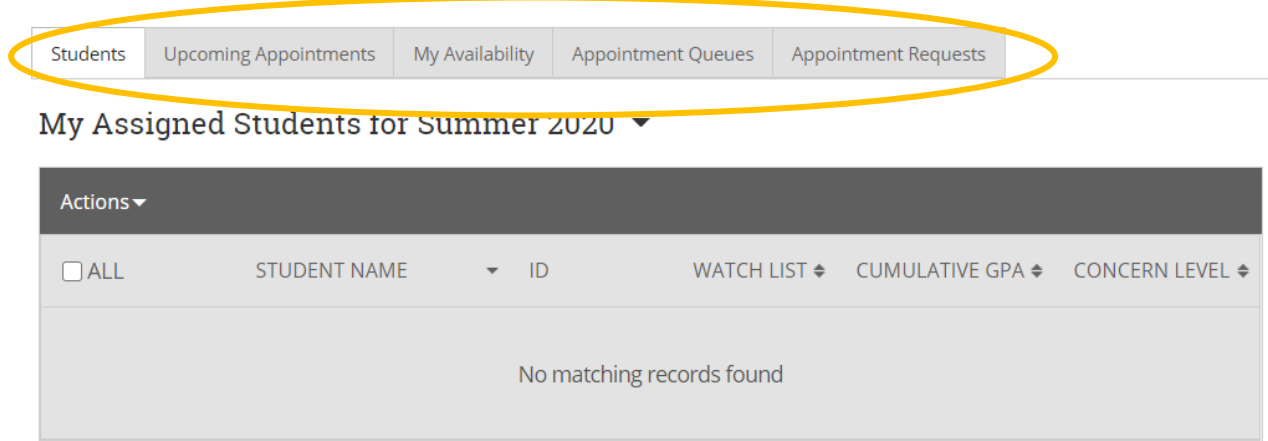
Professors can toggle between Staff Home and Professor Home using the dropdown arrow to access different features.



The **Staff Home** page includes:

- Students (a list of your “assigned students” or advisees)
- Upcoming Appointments (includes previous and upcoming appointments)
- My Availability (see Setting Up My Availability for more info!)
- Appointment Queues (if your building is using a kiosk check-in system)
- Appointment Requests (if students request an appointment outside of your availability)

Each of these tabs include additional “Actions” or quick links, and contain high-level information.



The **Professor Home** page includes Class Listing (a list of your classes), Students In My Classes, My Assigned Students (your advisees if you are a faculty advisor), and My Issued Alerts, which is a record of alerts you’ve issued to other departments (see [“Issuing an Alert”](#) for instructions on how to use alerts!).

Class Listing

CLASS NAME	TIME	ROOM
(CEP-250) ME Industry Cooperative I		Progress Reports
(CEP-350) ME Industry Cooperative II		Progress Reports

Students In My Classes

Actions ▾						
<input type="checkbox"/>	INDEX	STUDENT NAME	CATEGORY	COURSE(S)	AT RISK?	
<input type="checkbox"/>	1	Student A	Catalog Term - Fall 2018, Class of 2022, Division 1E, Education Opportunity Program, Expect Grad Term - Spring 2022, Undergraduate	CEP-250-1	No	
<input type="checkbox"/>	2	Student B	Catalog Term - Fall 2018, Class of 2021, Division 3E, Expect Grad Term - Summer 2021, Grad Candidate - Summer 2021, Undergraduate, VA Chapter 31 Student	CEP-350-1	No	

My Assigned Students For Summer 2021

Actions ▾						
<input type="checkbox"/>	INDEX	STUDENT NAME	CATEGORY	COURSE(S)	AT RISK?	
<input type="checkbox"/>	1	Student A	Catalog Term - Fall 2018, Class of 2022, Division 1E, Education Opportunity Program, Expect Grad Term - Spring 2022, Undergraduate	CEP-250-1	No	
<input type="checkbox"/>	2	Student B	Catalog Term - Fall 2018, Class of 2021, Division 3E, Expect Grad Term - Summer 2021, Grad Candidate - Summer 2021, Undergraduate, VA Chapter 31 Student	CEP-350-1	No	

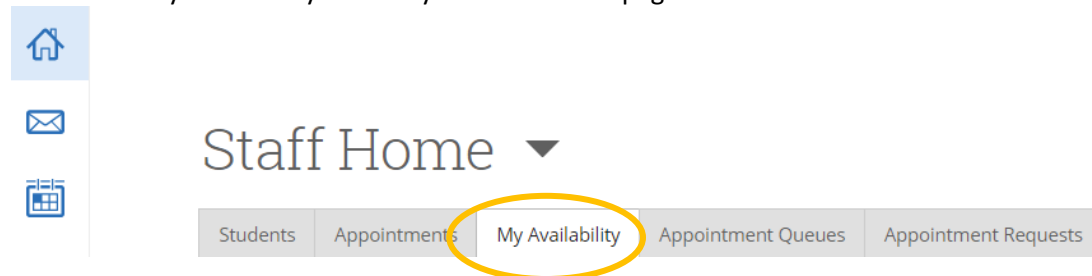
My Issued Alerts

ISSUE DATE	STUDENT	ALERT REASONS	CASES	PROGRESS REPORT
04/13/2021	Student A	Performance on Assignments and Exams	0 Open Cases	View Progress Report
04/02/2021	Student B	Performance on Assignments and Exams	0 Open Cases	View Progress Report

Setting up My Availability for Appointments and Office Hours

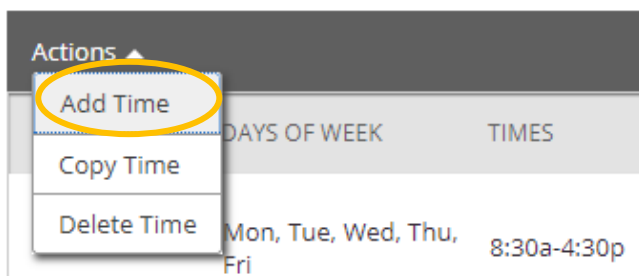
To allow students to schedule appointments with you and/or view your drop-in (office) hours, follow the below instructions to set up/edit your availability in “The Passport”!

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



Click on the “Actions” dropdown menu and select “Add Time” to set up times you are available. To edit a current availability, select the blue “Edit” link. Be sure to update your availability each semester!

Times Available



The “Availability” window will open, and you can set your availability:

- Select the **Days and Times** when you are available to meet with students.
- Select a **Duration** for your availability:
 - **Current semester** (students won’t be able to make appts. with you earlier than the first day of classes)
 - **A range of dates** (students won’t be able to make appts. with you earlier than the first day specified)
 - **Forever** (if your availability never changes, and/or you don’t want to update it every term)
- Select if you want this availability added to your **PAL (personal availability link)**. You can put your PAL in your email signature, syllabus, or on a website; when students select the link they are taken to a scheduling workflow that has this chosen availability pre-filled.
- Select whether you will meet with students via **Appointments, Drop-ins** and/or **Campaigns** during that time (you can make separate availabilities for each, or use the same availability for all types of meetings!)
 - **Appointments**: students can set appointments with you within the days/times of your availability
 - **Drop-ins**: students can view drop- hours and drop by your office or zoom. Be sure to use the “Special Instructions” section to let students know how to “drop-in”.
 - **Campaigns**: a mass email to send a link to your students to prompt them to make an appointment with you, within a certain timeframe. See our “Campaigns” how-to for more details.

- Choose the **Meeting Type** you'd like to offer the appointment (virtual, in person, phone). You can include all meeting types if you'd like to offer multiple ways to meet!
- Select your **Care Unit** (your department).
- Choose your **Location** (your department/area of expertise).
- Select which **Services** you will provide to students during this availability.
 - Select as many as you want!
 - Leaving this "Services" field empty means you will appear to be available for all services at the selected location.
- Include your **URL (Zoom link) / Phone Number** to indicate the best way to reach you!
 - URL (Zoom links) / phone numbers will appear in the appointment instructions when the student makes the appointment.
- Under **Special Instructions**, let students know any final details to be able to reach you for their appointment or drop-in hours (i.e. your building and office number, or virtual zoom link)
 - **EX:** *Let's meet virtually! Please use the zoom link provided to access our virtual meeting. Thanks!*
 - **EX:** *I am located in the SEAS/Lab Building, first floor, Office 012. See you soon for our in-person meeting!*
- Update the **Max Number of Students per Appointment** if needed (1 is the default, but you can increase for group meetings).
- 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 you want!

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

MODIFY AVAILABILITY
✕

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From

To

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

How long is this availability active?

Add to your personal availability link?

Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Meeting Type

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, let me know the best number to reach you at in the comments when you make your appt!

Will you be meeting with multiple students?

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

Max Number of Students per Appointment

Cancel Save

Syncing My Availability to Outlook Calendar

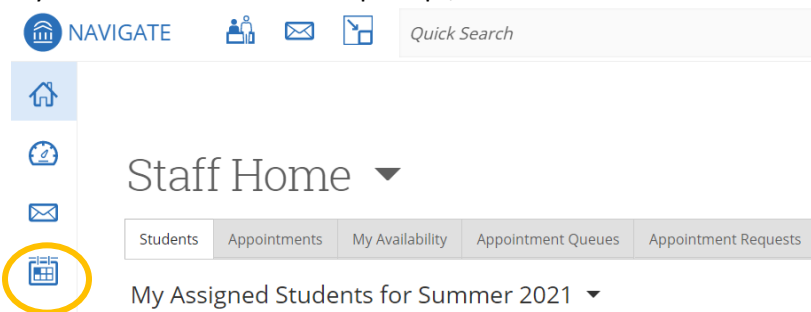
Faculty and Staff using The Passport for student appointments can sync their Outlook (Office 365) calendar with The Passport system. This is highly recommended, as it ensures that appointments made by students through The Passport don't conflict with existing Outlook calendar items. Below are instructions for setting up integration between Outlook (Office 365) and The Passport.

First, go to your Staff Home page. You may already see a prompt that requests you sync your Outlook (Office 365) calendar to The Passport. If so, click the "Authorize Office 365" button, log in with your Cal Maritime credentials, and your calendar will sync!



*Sync's can take up to 30 minutes, and will run in the background.

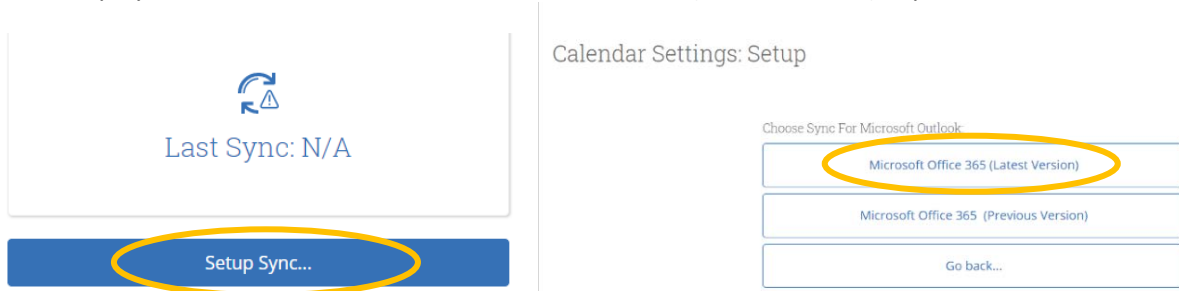
If you do not have the above prompt, click on the calendar icon on the left side menu.



Once in your Passport calendar, click on the Settings and Sync button on the upper right side.



Click "Setup Sync" button, then select "Microsoft Office 365 (Latest Version)" option.



A Microsoft sign in page will open, and you'll be prompted to log into your Cal Maritime email to complete the sync setup.



Sign in

Email, phone, or Skype


No account? [Create one!](#)

[Can't access your account?](#)

[Back](#) [Next](#)

Once the sync is completed, your Calendar Settings page will look like the below:

Microsoft Office 365 (Latest Version)
employee@csum.edu




Last Sync: 07/29/2021 At 02:25 PM

[Retry Sync...](#)

[Disconnect Sync...](#)

*Sync's can take up to 30 minutes, and will run in the background.

Sync'd calendars reflect not only your appointments made in The Passport, but also your appointments in your Outlook calendar. The Passport will not show the details for appointments made in Outlook (Office 365), but will reflect that you are "Busy" during that time.



My Calendar

Calendar View [List of Calendar Items](#)

Course Assignment General Busy Cancelled

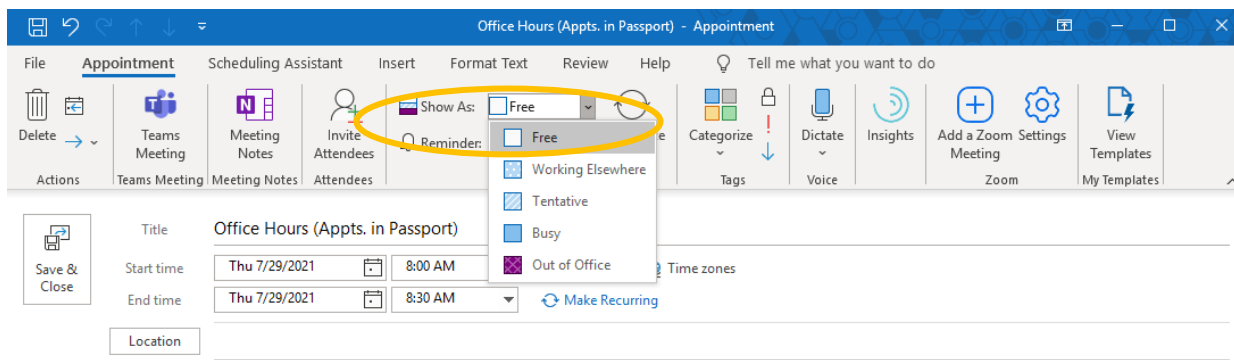
[Print Calendar \(PDF\)](#) [Add Calendar Event](#)

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 2pm Busy	2 8am Busy 9am Busy 10am Busy 11am Busy	3
4	5 7am Busy 8am Busy 12pm Busy	6 8am Busy 8am Busy 8am Busy 8:45am Busy 9am Busy 9am Busy 1pm Busy 2pm Busy	7 8am Busy 9:30am Busy 11am Busy 12pm Busy 4:30pm Busy	8 8am Busy 8:30am Busy 10am 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 calendar 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 The Passport since The Passport will read your Outlook calendar as unavailable.
 - **As a best practice**, we usually recommend marking any drop-in/office hours on your Outlook 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.



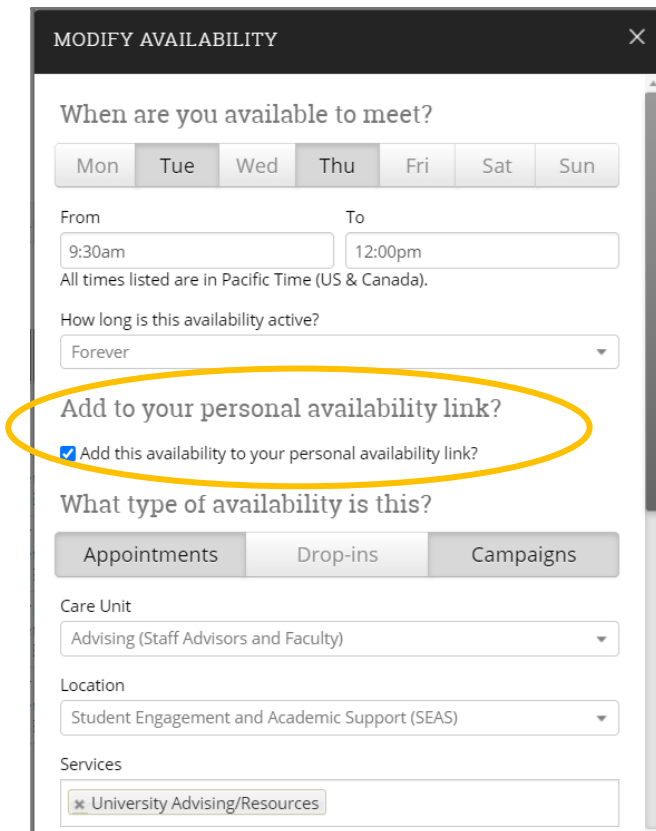
- For any questions or assistance, please email us at advisor@csum.edu.

Using Personal Availability Links (PAL)

Personal Availability Links (PAL) are a personalized link that when clicked, links students to the Passport Navigate app to schedule an appointment directly with you! Each “PAL” is unique to the faculty or staff member, and your link never changes.

You can **include your PAL in an email, email signature, syllabus, Brightspace page or website** to allow for quick and easy student appointment scheduling!

To use your Personal Availability Link, you will need to have an available time for appointments in your “My Availability” first, and you must make sure the “Add this availability to your personal availability link” box is checked for an existing availability. (See [“Setting up My Availability for Appointments and Office Hours”](#) for more info if needed!)



MODIFY AVAILABILITY [X]

When are you available to meet?

Mon Tue **Wed** Thu Fri Sat Sun

From: 9:30am To: 12:00pm
All times listed are in Pacific Time (US & Canada).

How long is this availability active?
Forever

Add to your personal availability link?
 Add this availability to your personal availability link?

What type of availability is this?
Appointments Drop-ins Campaigns

Care Unit: Advising (Staff Advisors and Faculty)
Location: Student Engagement and Academic Support (SEAS)
Services: * University Advising/Resources

You can find your PAL under your **Staff Home** under the “My Availability” tab.

Staff Home ▼

Students Appointments **My Availability** Appointment Queues Appointment Requests

Personal Availability Link

Link: <https://thepassport.campus.eab.com/pal/06> **Copy**

Below are some templates you are welcome to use for your PAL:

For email signatures:

Jane Porter

Assoc. Professor

To make an appointment with me, click [HERE!](#) <- hyperlink your PAL here!



For Syllabi and Brightspace pages:

Let's stay connected this semester!

Students can contact me via email, phone, or make an appointment with me in The Passport by clicking [here](#) (hyperlink your PAL here!). For email and/or phone communication, you can expect me to respond within 48 hours. If you do not hear from me by then, please feel free to send me a follow-up email.

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. FERPA:

- Starts 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 once they are matriculated.
- Protects student **education records** (any info directly related to a student, collected by and maintained by the university).
- Ensures students have a right of access to their own education records.

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

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.

Family Educational Rights and Privacy Act (FERPA):

FERPA Permissions:

- Students may choose to grant permission to disclose educational records to certain individuals by completing the "Authorization to Release Information" in their PeopleSoft Student Systems.
- 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).

Accessing FERPA from The Passport

- 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.
- 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.

Viewing FERPA Permissions

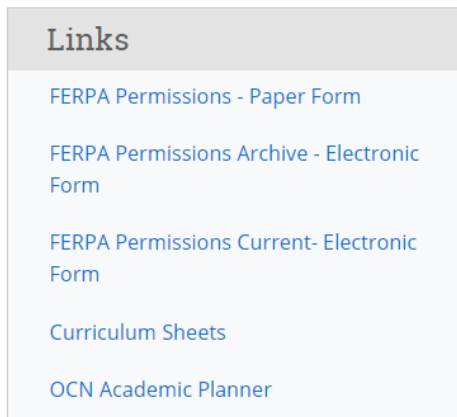
You can view whether a student has given authorization to release information in The Passport.

First search for the individual student in the “Quick Search” bar.



Once on the student’s profile, scroll down to the “Links” section (on the right side). You will see three FERPA Permissions links (Paper Form, Archive Electronic Form, and Current Electronic Form).

You will need to check all three areas to confirm whether a student has completed the manual paper form to give permission or has submitted once of the electronic authorization forms.



The “**FERPA Permissions - Paper Form**” link will take you to the “Relationships” page in PeopleSoft. There you can 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.

Find an Existing Value

Add a New Value

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

Search

Clear

Basic Search



Save Search Criteria

No matching values were found.

The **“FERPA Permissions Archive - Electronic Form”** link will take you directly to the student’s **“Authorization to Release Info – Adm Archive”** 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			✓	✓	✓	✓	✓	✓

The **“FERPA Permissions Current - Electronic Form”** link will take you directly to the student’s **“Authorization to Release Info – Admin”** page and will show if permission was given.

Authorize to Release Information - Current Status

Student Name: Student Name

EMPLID: 001234567

Office of the Registrar and Academic Advising Programs: may release academic record information, such as grades, enrollment, progress toward degree, academic standing, advising notes, etc.

Student Financial Services: may release charges and payments posted on your student account, and/or financial aid that has been applied or is pending disbursement, as well as current enrollment status, as it affects your balance.

Financial Aid and Scholarship Office: may release financial aid and scholarship information, including student account activity, awards and disbursements, and enrollment and academic data related to your eligibility for financial aid.

Authorization to Release Record(s) to Designee

Authorized Records to be Released to

Find

First 1 of 1 Last

First Name	Jane	Last Name	Porter	Access Code	1234	Expiration Date	12/25/22
------------	------	-----------	--------	-------------	------	-----------------	----------

Personalize | Find | First 1 of 1 Last

	Department	Records to Be Released	Purpose of Release
1	Academics	Grades, Academic Standing	Support

General Appointment Campaigns

In this document, the following topics will be covered:

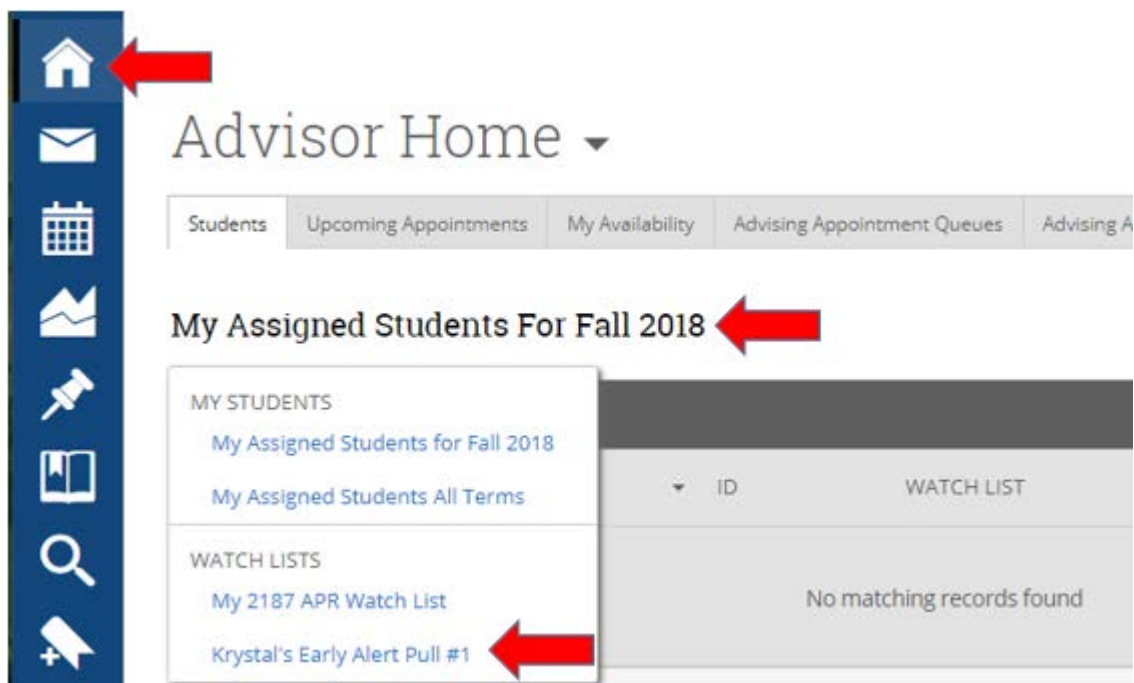
- Setting Up and Sending a Campaign
- Resending a Campaign to Non-Responders
- Appointment Summaries

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

Actions ▾					
		STUDENT NAME	ID	CATEGORY	AT RISK?
Send Message					
Advising Appointment Report					
Appointment Campaign					
Schedule Tutor Appointment					
Schedule Advising Appointment					
Schedule General Appointment					

- 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	Appointment Availability: 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 appt. 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

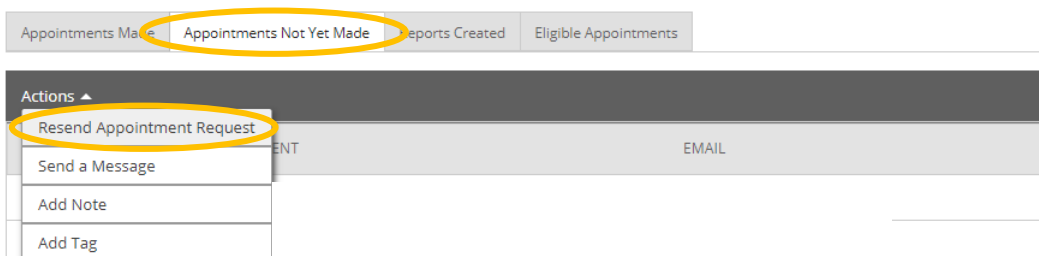
Campaign Type: Advising Appointment	Start Date: 10/09/2018	End Date: 10/19/2018
Reason: Early Alert	Appt Length: 30 minutes	Slots Per Time: 1
Appt Location: The Lab Building (Advising and Student Support)	Appt Limit: 1	Reminders: <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/>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



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).

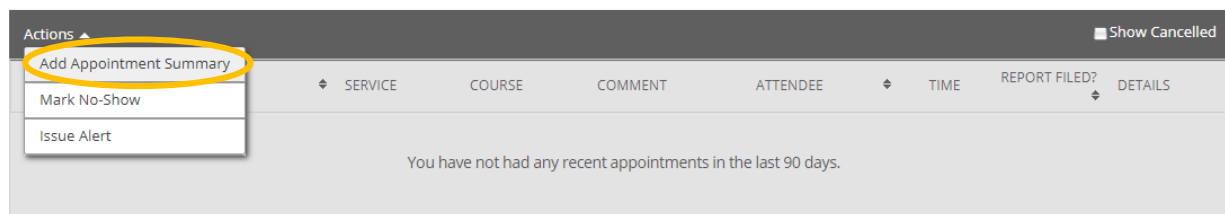
On the Staff Home Page, under the Reporting section, select your recent student appointment to fill out an appointment summary, or if the student did not show, you can also mark no-show.

Reporting

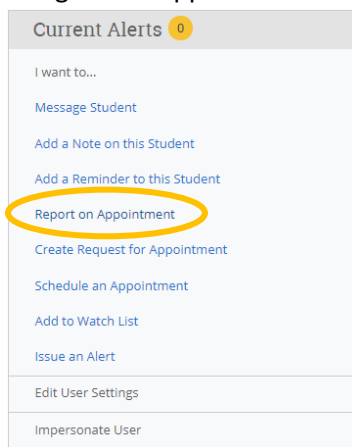
Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit: All care units



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.



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

B

I

☰

☰

🔗

Paragraph

▼

↶

↷

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:

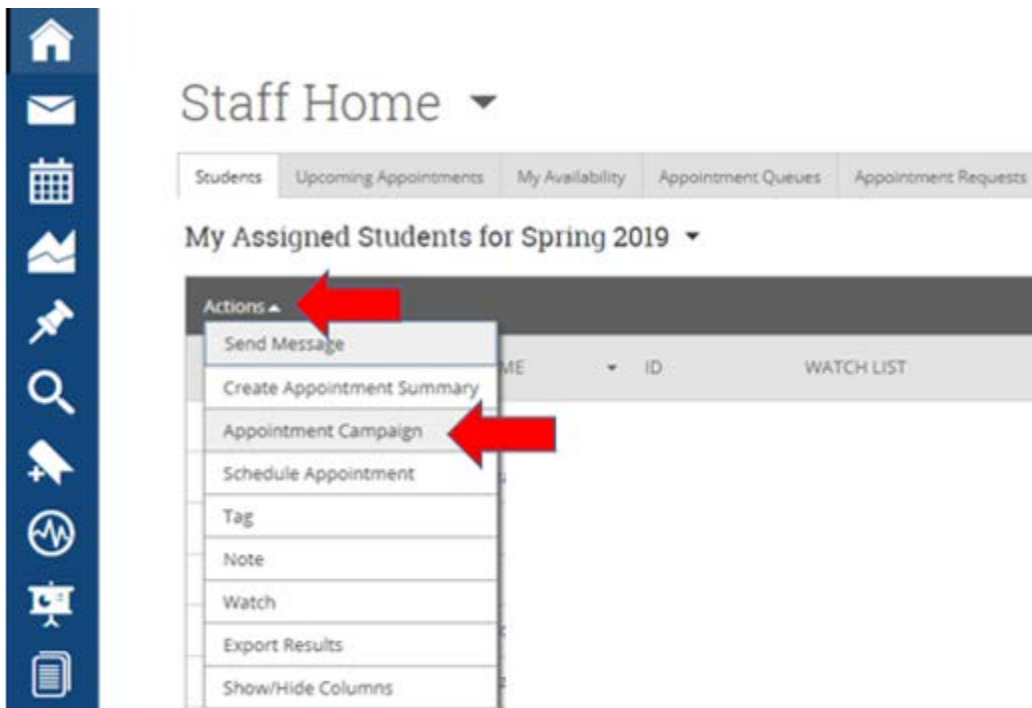
- d. Setting Up and Sending a Campaign
- e. Resending a Campaign to Non-Responders
- f. Appointment Summaries

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"/>	
Service: <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"/>	Katie Hansen	Appointment Availability: 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 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 <small>ADVISING 02/25/2019 - 03/16/2019</small>	Appts. Made (48%)
2193 Early Alert Pull 1 Loera <small>ADVISING 02/25/2019 - 03/16/2019</small>	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

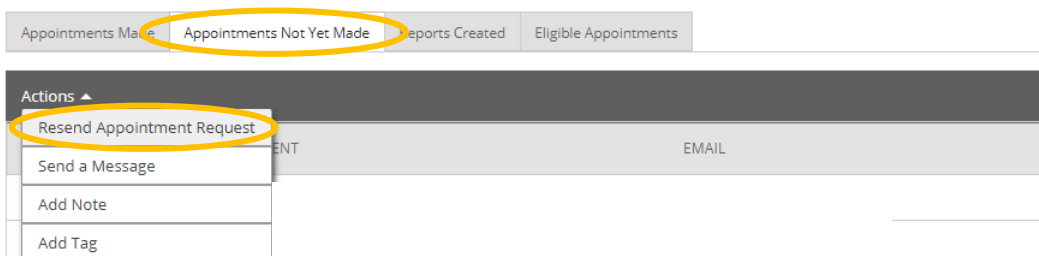
EMAIL

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



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).

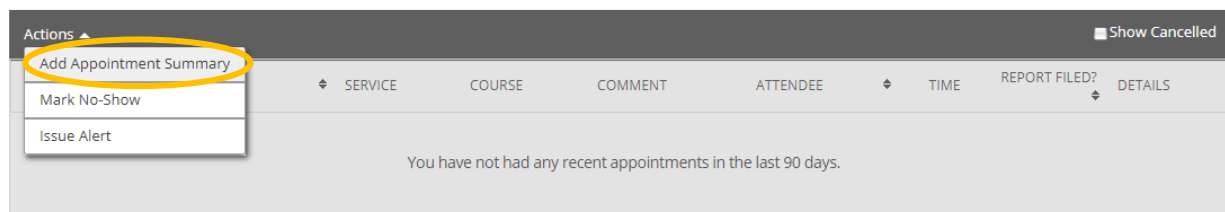
On the Staff Home Page, under the Reporting section, select your recent student appointment to fill out an appointment summary, or if the student did not show, you can also mark no-show.

Reporting

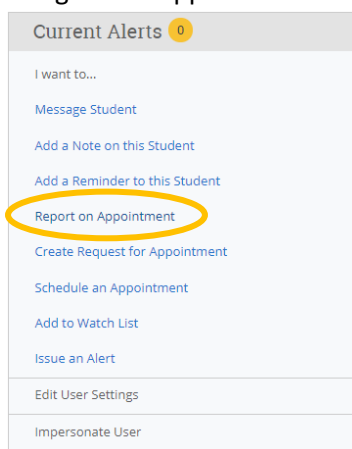
Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit: All care units



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.



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

B *I* Paragraph

Attachments

Attach 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.

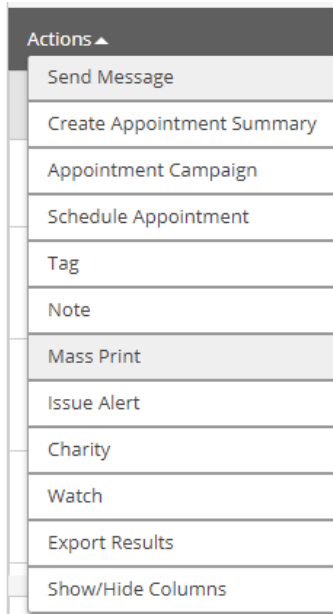
Search

New Search

The screenshot shows a search interface with the following elements:

- Saved Searches** (dropdown menu)
- Keywords (First Name, Last Name, E-mail, Student ID)?** (text input field)
- Type?** (dropdown menu with "Students" selected)
- 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**
- Success Indicators** (Concern Level, Success Markers)
- Search** (blue button, circled in yellow)
- My Students Only
- At-Risk Students Only
- Include Inactive

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



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
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:

Save

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

- 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”.

The screenshot shows the 'Advisor Home' page with a navigation sidebar on the left. The main content area has tabs for 'Students', 'Upcoming Appointments', 'My Availability', 'Advising Appointment Queues', and 'Advising Appointment Requests'. The 'Students' tab is active, and a dropdown menu is open for 'My Assigned Students For Fall 2018'. The dropdown menu lists 'MY STUDENTS' (with sub-items 'My Assigned Students for Fall 2018' and 'My Assigned Students All Terms') and 'WATCH LISTS' (with sub-items 'My 2187 APR Watch List', 'Krystal's EA Pull #1_10.09.18', and 'test'). The background shows a table with columns 'ID', 'WATCH LIST', and 'CUMUL', and a message 'No matching records found'.

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

Actions ▲
Send Message
Create Appointment Summary
Appointment Campaign
Schedule Appointment
Tag
Note
Mass Print
Issue Alert
Charity
Watch
Export Results
Show/Hide Columns