

NEW Panther Success Network (PSN 2.0) Advisor Manual

Updated 3/28/2025

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PANTHER SUCCESS NETWORK IMPLEMENTATION QUICK START GUIDE

EAB / Navigate	Highpoint
Care Unit	Department
Conversations	Message Center
Student Profile	Student Details Page
PSN Homepage	Student Lookup
Category	Custom Attributes
Quick Search	Simple Search
Assigned Students	My Advisees
Appointment Availability	Schedule
Appointment Campaign	Appointment Request
Early Alert	Course Based Action Item
Department Referral	Non-Course Based Action Item
Watch List / Student List	Student List
Advanced Search	Student Lookup Filters

Terminology Changes

Tentative Platform Implementation Schedule

Implementation Phase	Date of Activation	Staff Population	Student Population
Pilot	February 17 th	Pilot advisors	Pilot students
Phase 1a	March 31 st	UGRD Academic Advisors	FTIC/TRF 1255 UGRD Admits
Phase 1b	April 21 st	UGRD Academic Advisors	All continuing UGRD students
Phase 2	April 21 st *	Student Support Depts (Coaching, Secondary advisors, etc.)	All UGRD students
Phase 3	April 21 st *	UGRD Faculty	
Phase 4	Summer 2025	GRAD Faculty & Admins	GRAD students

Platform Use During Implementation

Non-Implemented Student Population (PSN1.0/EAB/Navigate)	Implemented Student Population (PSN 2.0/Highpoint)
Appointments/Appointment Campaigns/Appointment Summary Reports	Appointments / Appointment Summary Reports
Appointment Availability / Calendar Sync	Schedule / Calendar Sync
Conversations	Notes
Notes	Student Lists
Calendar sync	Student Lookup Filters
Student lists	Saved Searches
Advanced Searches	
Early Alerts / Departmental Referrals (ALL STUDENTS)	

LOGGING INTO THE NEW PANTHER SUCCESS NETWORK

Accessing the NEW Panther Success Network	
To log into the Panther Success Network, visit https://my.fiu.edu Click on the Login to myFIU button.	
Log in using your <i>FIU Panther username and password.</i>	Academic Information University II for University Septicas
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	Having trouble logging in? Get.Help Manage.Account
Once you are logged in, select the Advisor option from the dropdown menu located at the top of your browser window.	Advisor ~ Scheduler/Credentaling
	Advisor Success Network NCAA Faculty 4
Click on the Success Network tile .	Campus Solutions Student
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	Degree Pathway Change of Program/Plan HP CX PREVIEW
	FIU FIU

You will be redirected to the Success Network landing page.

During the implementation transition, there will be two buttons on this page. Click on the PSN button to expand.

- **TOP button** Will redirect you to the **NEW** Panther Success Network. You will be utilizing this for:
 - Messages
 - Appointments
 - Notes
- BOTTOM button Will redirect you to the OLD Panther Success Network. You will be utilizing this for:
 - Early Alerts
 - Referrals

Click on the **NEW Panther Success Network** button to be redirected to your PSN dashboard.



THE ADVISOR/COACH DASHBOARD



YOUR ASSIGNED STUDENT POPULATION

To view your assigned student caseload, first click on the *Advisor* submenu located on the lefthand side of your browser window.

In this expanded bracket, you will now find **Student Lookup** listed.

Click on Student Lookup.

You will be redirected to the **Student Lookup** page.

On this page, you will find the student population assigned to you as Academic Advisor and will serve as your *Advisee Relationship Management (ARM)* homepage.

At first look, you will find information used to identify students like their Panther ID, full name, Career, Program, Plan, Sub-plan, Admit Term and Expected Grad Term.

Note: **Each student will possess one row per declared plan.** If a student has multiple declared plans, there will be one row per declared plan.

Each row can be expanded to provide more detail on each student, such as FIU OneCard photo, contact information, assigned staff, and a summary of student program/plan history.

Within each row, you will:

1)click on the **Open** button to the right of each row to be redirected to the Student Details (student profile) page

2)be able to perform various functions through the *Actions* menu. This is a shortcut function where you can

- Send a message
- Add a student to a Student List
- Create an Action Item
- Add a Note



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These functions can be done for students individually or in mass AND 3)view if a student has a *Hold* placed on their profile in Campus Solutions

THE SIMPLE SEARCH (QUICK SEARCH)

The <i>Simple Search</i> functions to provide an expedited way to navigate to Student Details pages. The <i>Simple Search</i> function is conveniently located at the top of your browser window throughout the Panther Success Network platform. Pages such as the <i>Student Lookup</i> and <i>Student Details</i> page will feature the Simple Search box.	BudderLickskip BudderLickskip BuderLickskip BuderLickski
Currently, the <i>Simple Search</i> is limited only to students who are Active In Program.	Student Lockup Definite Definit Definite Definite Definite Definite Definit
Soon, however, you will be able to use this search function for any student with a Panther ID, whether they are Active In Program, Future Term Admits, Discontinued, Graduated, etc.	Image: state
All students are searchable by name, Panther ID or email address.	Budart Lodup
You will find a dropdown menu where you can toggle between each type of identifier.	Norm Norm Three Three 0 0 Reference (0) Reference (0) Reference (0) Reference (0) 0 Reference (0)
withing your assigned student population.	Image: 1 1<
To use the Simple Search , select from the drop down menu what identifier will be entered and type in the student's Panther ID, name or email address.	
Click on the Search button.	
You will be automatically redirected to the appropriate Student Details page.	

THE STUDENT DETAILS PAGE (PROFILE PAGE)

Each student found on the Panther Success Network will have their own dedicated **Student Details** page.

The *Student Details* page will be where you will find the following documentation:

- Appointment history
- Notes
- Message history
- Action Items

At the top of the *Student Details* page, you will find six tabs:

- Academics
- Categories (PSN 1.0 equivalent. Name to be finalized)
- Appointments
- Notes
- Messages
- Profile

Within the first tab, the *Academics tab*, you will find information pertinent to the students' Academic and Educational Career and Progress. Items such as important identifiers like Academic Plan history, Cumulative GPA, Cumulative units, Assigned Advisors, Class schedule, Grades, Student Groups, Holds and Honors/Awards.

Note: the ability to view *Holds* listed is dependent on your ability to see/manage specific Holds.

The second tab, currently named *Categories*, will be the home for custom attributes. These custom attributes will be used to identify students pertaining to special populations. These identifiers will serve similar functions to the identifiers on the current Panther Success Network platform.

The third tab, *Appointments*, houses the Appointment history for a particular student. Here you will access all advising sessions, whether scheduled or drop-in, and the associated Appointment Summary Report. As an advisor, you will have access to view all Appointments, no matter the department the student met with.

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In this tab, you will also have access to schedule an advising session if needed.

The fourth tab, *Notes*, houses a combination of all documents attached to the student being viewed. Appointment summary reports, Notes (comments), course-based Action Items and non-course-based Action Items (departmental referrals) will be found here.

The fifth tab, *Messages*, will provide you with access to all messages exchanged with the student. With future enhancements being made to this component of the platform, read only access will be established and your ability to edit a message thread is dependent on your security settings.

The last tab, *Profile*, is where you will find contact and biographical information for this particular student.

From within the *Student Details* page, you will be able to perform certain functions:

- Send a Message
- Schedule an Appointment
- Create a non-course-based Action Item
- Add the student to a Student List
- Act as the Student and view their CX Dashboard

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OUTLOOK CALENDAR SYNC

Syncing your Outlook Calendar to your Panther Success Network (PSN) Calendar allows you to have up to date reflection of open appointment times to allow for everyday management of your work calendar. It is through this function that openings and blocks will be interpreted to provide students with available times when scheduling their advising sessions.

To sync your PSN calendar, first click on the *Advisor* submenu located on the lefthand side of your browser window.

In this expanded bracket, you will now find **Settings** listed.

You will be redirected to your personal settings page. This is the page where you will create your Advisor Schedule and establish your Calendar Sync.

Click on the *Add Calendar* button indicated in the image on the right.



Once confirmed, you will soon be able to see calendar blocks from your Outlook Calendar on your Panther Success Network (PSN) Calendar.





YOUR SCHEDULE (APPT AVAILABILITY)

Creating Locations for your Schedule (Appointment Availability)		
Your Schedule will provide the Panther Success Network platform with essential information regarding your advising schedule.	Dashborrd	٥
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To create your Schedule , first click on the Advisor submenu located on the lefthand side of your CX	Consequences C	
dashboard browser window.		

In this expanded bracket, you will now find **Settings** listed.

You will be redirected to your personal settings page. This is the page where you will create your Advisor Schedule and establish your Calendar Sync.

From the list of Departments listed, **select the Department that you belong to.** This Department is from where you will create and document advising sessions, send messages, and more.

A **Department** has been created for each College's Advising Department to allow for appointment settings, limitations and restrictions can reflect each unit's business practices.

For each **Department**, you will find Default Location(s) have been created. This will allow you to already have a <u>standardized in-person location</u> created on the platform.

You will add a *Virtual Location* that will be tied to all advising sessions scheduled to take place via Zoom.

If your selected **Department** facilitates advising sessions by phone, a location can be created to reflect the phone number you will use.

To add a new location, for virtual or phone advising sessions, click on the *Add* button. A pop-up will appear. Type in the Zoom URL that will be used in the text box.

The platform will automatically recognize the format of the Location information entered and assign whether it is a *Virtual* or *Phone* location.

Click on the Save button to confirm.

The new Location will appear listed immediately.

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A pop-up with your Schedule will open. Make all the necessary changes to reflect the advising session offering you wish to extend to students.	String: > Colego of Business Advising Central Sync Schedde String: > Colego of Business Advising String: > Colego of
When you are satisfied with the changes made, click on the Save button to confirm.	Bay APPointMetri Houliss Location Department Delust Advisor Advisor Advisor De
Your edited Schedule will appear reflecting the new changes immediately.	Proday 8:00 am - 5:00 pm 🚉 🗖
Deleting your Schedule (Appointment Availability)	
To delete your Schedule , begin by navigating to your Settings page.	Settings classing Classing
Select the <i>Department</i> where your <i>Schedule</i> was created.	
You will now see the Schedule(s) that you have already created.	



THE SCHEDULING LINK (PERSONAL AVAILABILITY LINK)

A Scheduling Link is available for you to provide to students to facilitate the scheduling of advising sessions.	Settings > College of Business Advising Calendar Sync K60 Calendar Sync K60 Calendar Sync
The Scheduling Link will be tied to your Schedule and is customized to your availability within a department.	Nie Calender Conforged
Each advisor will have their own Scheduling Link.	Location © Department Default Advisor Defa
To create your Scheduling Link, navigate to your Settings page.	Vrtual https://zoom.us/mpicoentroom E Trustedy 8.00 am - 5.00 pm E Fréday 8.00 am - 5.00 pm E
Click on the Create Scheduling Link button.	

Settings > College of Business Advising ۵ Calendar Sync You will be able to copy this link and refresh it as needed. Edit 🚫 🛅 + Please note that if you should ever refresh your Scheduling Link, the previously created link will be 8:00 am - 5:00 pm 🚢 🛄 42 deactivated and will no longer be tied to your 8:00 am - 5:00 pm 💻 305-348-200 e. 8:00 am - 5:00 pm 🚢 🗖 Schedule. 8:00 am - 5:00 pm 🛄 8:00 am - 5:00 pm 🚢 🛄

To facilitate the distribution of your PSN Scheduling Link, a FIU Go-link can be created. FIU Q 55 Begin by navigating to https://go.fiu.edu go.FIU In your internet browser. What is go.FIU Custom URL Edit my links ☑ We want to hear from you Click on the LOGIN button. You will be redirected to the FIU GO login page. FIU FLORIDA INTERNATIONAL UNIVER FIU GO Log-in using your FIU username and Password. Use You will be asked to use two factor Log in authentication. ble logging in? Get Hel

CREATING YOUR FIU GO-LINK





THE CALENDAR

Your *Calendar*, or Appointments page, will be an essential page to knowing what your upcoming daily advising sessions schedule looks like.

Here you will be able to see:

- Details surrounding your Schedule (advisor availability)
- Calendar blocks via the Outlook Calendar sync
- Open advising session times
- Scheduled advising sessions

Additionally, if you click on an advising session, details such as the following will be available to you:

- Student Name & Panther ID
- Date/Time
- Modality
- Appointment reason and Comments

Advising sessions that have an attached Appointment Summary Report are classified as Completed and are marked with a Green Dot.

Advising sessions pending an Appointment Summary Report are considered Incomplete. These are marked with a Red Dot.

You will also be able to attach an *Appointment Summary Report* from here as well.



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Appointments history can be viewed in Calendar of	Res-rs, NIS D (Washing > 1) the	Counted for Store		14.14	70 FT
List format. To switch between these views, click on					
List format. To switch between these views, click off	-		© transm	() includes	Q incase
the important button found on the upper right corpor		() reason			
the button found on the upper right comer				() Constant	
of your PSN Appointments page.					

THE MESSAGE CENTER

Viewing your Massage Contex (Convergations)			
viewing your message Center (Conversations)	= Dashboard		
From your CX Dashboard, you will conveniently be	Hello Grat	Advisor	=
able to access the entirety of the messages that	In Takey		
able to access the entirety of the messages that	Arbisint Aposistment	Eeh 11 2025 7-51	
nave been exchanged from within your department	Advising Appendition	P80 A.4, 4040, 1-2A	
on the platform.	\$ [6		
To navigate to your inbox, begin by clicking on the			
Advisor menu so that it expands.			
Click on the Messages option.			
	191		
You will be redirected to your Inbox.			
	FIII =		
From your Inbox, you will have access to all	★ Dashboard	Advisor	
Messages that originated inside of the Department	Advisor		
selected when it was being composed.	Action Items		
5 · · · · · · · · · · · · · · · · · · ·	Appointments Messages	Feb 11, 2025, 7:51	
	Student Lookup		
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By default, you will find two boxes (Participated and	Full Site		
Responsible) will be checked	Maria v		
	45		
This sotting is intended to filter out the messages			
this setting is intended to inter out the messages	_		
nat pertain to your personal advising	Messages Threads: 1-10/924		anar' y Q Securit
esponsibilities.		C PREV 2 3 4 5 50 NEXT > 100 mm	518745 DATE
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A message is designated as <i>Responsible</i> when you	• Access 12	and the second sec	Closed Mar 2
are the designated recipient of the message. By	 March and and final March and and final 	Manufacture and an ended in the second	Cosed Mar
lefault you will receive messages initiated by	 ■ 4.5 mm 35 	TAN PROPERTY AND A CONTRACT OF	Open Mar
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A message is designated as <i>Participated</i> when you			
contribute to the thread of messages. For example			
a maccage that you receive and respond to is			
a message mar you receive and respond to is			
considered a thread where you are a participant.			

At the top of your <i>Messages</i> page, you will find the ability to search for students by Panther ID or Name.	
Creating a new Message	
New messages can be created from various locations on the Panther Success Network platform.	Student Loolup Other + 0 = final Index Link 0 Budents 207 027 covid Student 207 027 covid Index Link 0 Budents 207 027 covid Student 207 027 covid Index Link 0
1) From the Student Lookup page	$ \begin{array}{ c c c c c c c c c c c c c c c c c c c$
The Student Lookup page serves two functions on the Panther Success Network; as the central	□ ≥
homepage where you will see your assigned student advisees list OR as the page where you will perform gueries by selecting filters to identify students that	bin a v Balter Lolap Buler Lol
match certain criteria.	Image: Description of the first section of the first s
button. You will find various functions can be performed by clicking on this button.	6 > all & 0 As. THE MARK
Select the Send Message option from the list of options.	Send message to Transmission Department* Subject* 0/50 Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text
A pop-up will appear.	
Begin by selecting the <i>Department</i> that you are composing this message for. You will find a	

dropdown menu of the Departments that you	
nossess access to composing messages	Send message to •••••••••••••••••••••••••••••••
possess access to composing messages.	Department."
	CARTA Advising
	CASE Advising
Compose the subject and body of the message.	CLC Coaching
	Career & Talent Development
Send	College of Business Advising
Click on the button when you are done	Computer Science Advising
composing the message.	Engineering Advising
	FIU Central Advising
	Financial Wellness Coaching
	Global First Year Coaching
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	Honors College Artusing
	Send message to
	Department.*
	CARTA Advising
	Advising Appointment
	20/50 ► ~ Normal - B/US↔ E ⇔ L
2) From your Appointments page	Good afternoon,
2) From your Appointments page	Please be advised that enrollment is fast approaching. Please schedule your advising appointment for enrollment
A shartest is such added in side as shart shiring	planning. Thank you!
A shortcut is embedded inside each advising	
session on your <i>Appointments</i> page. Here, you can	Allow Replies 🔲 Expire Thread
send a message to these students should it ever be	
necessary.	
To begin, click on the appropriate advising session	
from your Appointments page.	60 A **
	-
	de anna
Doing so will open the calendar event.	
5 1	
From inside the calendar event, you will be able to	
send a message to the student	0 mm 0 mm 6 mm 6 mm
Click on the Sand Massage button	
Click of the Send message bullon.	© ▷ ♠ ▲ ▾ ≡
	Appointments > Details
	ت المعنية عند 11:00 AM (20 ma)
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A pop-up will appear.	Hoad Market Market
	Appointment Summary
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	revend of executionality in the test bis means the bis merits (bishef methods as intered is nearly bit or polypointing paid, A and A, where to Cancer 12 bishef Testighters will be bished. Interesting as appointers with a saver photor site product to the student as well. Concertable bishef Testighters and a saver photor site product to the student as well.
	Viewe is weater sender - POTVDBS

Begin by selecting the Department that you are composing this message for. You will find a dropdown menu of the Departments that you possess access to composing messages. Compose the subject and body of the message.	Send message to Department* Subject* Of0 Normal • B / U S ↔ E œ C* Text Text Itext
Note: To allow the student receiving the message to reply to the message, check off the Allow Replies option at the bottom of the message window.	Send message to •••• • • • • • • • • • • • • • • • •
When ready, click on the Send button.	Carcer & Talent Development College of Business Advising Computer Science Advising Education Abroad Advising Engineering Advising FIU Central Advising Global First Year Coaching Global First Year Coaching Graduate CNHS Advising Homos College Advising Homos College Advising Construction Construction College Advising Base of a state of a
Creating a new MASS Message	
Using your <i>Student Lookup</i> page, sending a message to several students is simple to do.	
Begin by selecting the population of students that you wish to distribute this message to.	

From your assigned student population, you can **"Select All"** by clicking on the box indicated in the image on the left. This will select all students assigned to you.

Then, click on the Actions V left of the *Filters* button.

button located to the

Status	Activ	07 (222 rows) e in Program - #	207 Selected	Clear Filters				_			Y FR
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¥	>	\$			1000	$\mathcal{L} = \{ (1, 2, \dots, 2^{n-1}) \mid i \in [1, 2^n] \}$					Ope
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Various options will open from this button.

Select Send Message from the list.

=	Student I	Lookup						ID/Email = ID or Email /	Address	Search Student	Lists 🔲 🌣
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A popup will appear.

Select the *Departmen*t from which you will be sending this message.

Compose the message intended for this group of students.

When ready, click on the Send button.

Students will receive this message as a blind copy.

Send message to 207 Students	×
Department*	~
Subject*	
	0/50
Normal - B/US (> E C> 🖬	
Text	
Allow Replies Expire Thread	_
	Send

	~
Department:"	^
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CASE Advising	
CLC Coaching	
Career & Talent Development	
College of Business Advising	
Computer Science Advising	
Education Abroad Advising	
Engineering Advising	
FIU Central Advising	
Financial Wellness Coaching	
Global First Year Coaching	
Graduate CNHS Advising	
Honors College Advising	



You will now be able to type a response to the message.

Click **Send** when ready to confirm the message.



SCHEDULING APPOINTMENTS

Scheduling an Advising Appointment on Behalf of a Student	
Scheduling an advising session on behalf of a student can be done from two locations on the PSN platform.	Dashboard D Dushaard Hello= Academics Tuaching Advisor 葉 Editby Weiger
1) From your Appointments page	Action home Appendixment Appendixment Prep Feb 4, 2025, 524
Begin by navigating to your <i>Appointments</i> page. You will see the <i>Appointments</i> page listed in the <i>Advisor</i> submenu on your <i>PSN Dashboard.</i>	Latings If CC Vert Dire 16, 2024, 2:55 > Mulpics Test NC Nov 22, 2024, 4:59 > Case Information Mulpics Construction Mulpics Mulpics Mulpics
Click on the Appointments option in the submenu.	L False
You will be redirected to your Appointments page.	
Located at the top right corner of the page, you will find the <i>Add Appointment</i> button.	
Click on the Add Appointment button.	
You will be redirected to provide scheduling details for this advising session.	Appointments > Add Description Description
 Provide the following information: Student name/Panther ID or FIU email address Department 	Heaton Availability Custom Add appointment details to see available
 Appointment Type / Reason Modality Comments (if necessary) 	apportment times

A calendar will appear listing available appointment times.

Available appointment times will be reflective of both the student and advisor's calendars.

When ready, click on the *Create* button to confirm.

The advising session just created will immediately appear on your Appointments page.

2) From inside a Student Details page

Begin by navigating to a students' *Student Details* page.

From inside the **Student Details** page, you will be able to schedule an advising session from one of two locations:

 The Add Appointment button in the Appointments tab

OR

 The isotropy located at the top right corner of the Student Details page.

From either avenue, you will:

Click on the Add Appointment button.

You will be redirected to provide scheduling details for this advising session.

Provide the following information:

- Student name/Panther ID or FIU email address
- Department
- Appointment Type / Reason
- Modality
- Comments (if necessary)



A calendar will appear listing available appointment times.

Available appointment times will be reflective of both calendars.

When ready, click on the *Create* button to confirm.

The advising session just created will immediately appear on your Appointments page.

			✓ ×
College of Business Advising	Appointment Type: Advising Holds	(3): In-Person, Phone, Virtual	~
Peason: Student has advising holds. Must review PDA to lift h	nold.		
Availability Custom			
February 2025 👻 <	> 8:00 am (3	0min)	••
S M T W T F	s 8:15 am (3	Omini)	0 🖓
	8:30 am (3	0min)	•
2 4 5 6 7	8 B https://www.com/action/actio	//zoom.us/myzoomroam	
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16 17 18 19 20 21	22 9:00 am (3	0min)	00
23 24 25 26 27 28	9:15 am (3	Omin)	0 -

APPOINTMENT SUMMARY REPORTS



	Approximates > Details
automatically appear below the appointment.	Image: Control integration Image: Control integration </td
Creating an Advising Appointment Summary Report for a <u>Drop-In</u> Advising Session	
Drop-In advising sessions, as we know, are not scheduled prior to the time that you meet with a student.	
The process of documenting your drop-in advising session is like that of creating an advising session from the Calendar.	
A drop-in advising session can be created through either:	Apportunits
1) your Appointments page	
Begin by navigating to your Appointments page.	
Click on the Add Appointment button located at the top right corner of your Appointments page above the Calendar.	
You will be redirected. To search for the student that you wish to create this appointment instance for, enter either the student's Name or Panther ID or FIU email address. Select the type of identifier you are entering by using the dropdown options menu.	Appendixents * Add
Click Search .	
 You will see three dropdown menus. Select from the menus below the <i>Student Search</i> bar: the <i>Department</i> that this appointment pertains to from the dropdown menu ont he left the <i>Appointment Type</i> from the dropdown menu in the middle the <i>Modality</i> from the dropdown menu on the right 	Approximate * Aut



Student Lookup page OR through the *Simple Search* located at the top of your ARM homepage.

With the *Student Details* page open, click on the *Appointments* tab. You will now be looking at the Appointments History for this student.

Click on the *Add Appointment* button located at the top right corner of the page.

A popup will open with the appointment formulary.

The platform will automatically pull in the student's information and tie it to this appointment.

You will see three dropdown menus. Select from the menus below the Student Search bar:

- the *Department* that this appointment pertains to from the dropdown menu ont he left
- the *Appointment Type* from the dropdown menu in the middle
- the *Modality* from the dropdown menu on the right



Click on the *Custom* tab.

Specify the time and appropriate location where you met with the student.

Lastly, provide the necessary comments and an attachment to document your interactions with the student.

To confirm this *Appointment Summary Report,* click on the *Create* button.





	Appointments > Details
	January 31, 2025, 11:00 AM (30 min)
	Send Message
	Meeting Mode: Appointment Type: Link: Computer C
	Enail: cotstaev@lu.edu Created by Phone: 555/556-5555
Click on the Update button to confirm these	Appointment Summary
changes.	
	SUMMARY
	The student has completed 90/130 credits resulting in an advising hold to be placed. The degree audit has been reviewed to confirm standing. Current course enrollment was reviewed and recommendations for the next two comments the way may be an advising the standing of the standing advising advisiting advisiting the standing advisition of the standing of the stan
	sentences have been made as we account interview an interview in interview poor glacocount gass, no soci, a referral to Career & Talent Development will be issued, information on Handshake and making an appointment with a career activity was provided to the student as well.
	Created by M
	Edit Appointment Summary for
	SUMMARY
	▷ ~ Normal - B/ U 용 ↔ 툴 영 다
	The student has completed 90/120 credits resulting in an advising hold to be
	placed. The degree audit has been reviewed to confirm standing. Current
	course enrollment was reviewed and recommendations for the next two
	semester have been made as well. Student mentioned an interest in meeting their post-graduation goals. As such, a referral to Career & Talent
	Development will be issued. Information on Handshake and making an
	appointment with a career advisor was provided to the student as well.
	ATTACHMENTS
	Drop files here to upload or Upload from your device.
	The file must be in the format ipa, ipea, pna, bmp, pdf, tif, tiff, zip and not lar
	than 4.88 KB
	Cancel Update
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button to confirm.	

Appointments > Details
February 11, 2025, 5:30 AM (30 min) COMPLETE Image: State of the
Created by
SUMMARY Me with student, Discussed current course enrollment. Made specific course recommendations for upcoming semietism. Hold is lifted. Student can enroll in next 2 semiesters.
Appointments > Details
February 11, 2025, 5:39 AM (30 min)
Moting Mode: Approximate Type: Link: Moting Mode: Provide Type: Advisor Information Reason: Provide Type: Provide Type: Student Ass advalarg holds. Multi review PDA to Rt hold. Provide Type:
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Edit Appointment Summary form
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ADVISING NOTES

Creating an Advising Note
An Advising Note is meant to place a comment on a student profile without having an associated Appointment on a student or advisor's calendar.
A common use of an <i>Advising Note</i> by the university is to provide summary commentary and course recommendations following an Advising & Registration Day session with a student.
An <i>Advising Note</i> can be created through various avenues on the platform:
1) The Student Lookup page

Either from your list of assigned student population or the results of a query, you will be able to create a *Note* from this page. A Note can be created for individual students as well as for multiple students at once.

To create an *Advising Note*, begin by selecting the student(s) that you would like to attach the Note to.

Click on the mext to the student(s) that were selected.

An *Actions* menu will open. Click on *Add Note* from the options listed.

A popup will appear.

Select the *Department* from the dropdown menu to indicate which department created the Note.

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Select the Category (Note Reason) that applies to the Note.

Compose the comment that will apply to this Note.

If needed, attach any file attachments to the Note.

Note: Notes are by default visible to students when

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When ready, click on the *Add* button.

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2) The Student Details page

Begin by navigating to the Notes tab found in the Student Details page for the student.

Click on the Add button located on the right-hand side of the Student Details page.

A pop-up will appear.

Select the *Department* from the dropdown menu to indicate which department created the *Note*.





Select the **Category (Note Reason)** that applies to the **Note.**

Compose the comment that will apply to this Note.

If needed, attach any file attachments to the Note.

When ready, click on the *Add* button.

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STUDENT LISTS (WATCH LIST)

Creating a Student List (Watch List)

A **Student List** allows you to identify students that for one reason or another require particular special attention. By maintaining a list of this nature, you will have a way to keep watch over or monitor students. Student Lists can also allow for you to perform certain functions like sending messages in mass, add a Note, opening an Action Item, and more.

To create a *Student List*, begin by navigating to your Student Lookup page.

Towards the top right corner, you will find the *Student Lists* button.

Click on the Student Lists button.

You will be redirected to the Student Lists page.

Here you will find your personal *Student Lists*.

Note: *Student Lists* can only be seen by the user that created them.

Click on the *Create Student List* button located at the upper righthand corner of the platform window.

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Adding a Student to a Student List (Watch List)	
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From your Student Lookup page, you will be able to use the Actions menu as a shortcut to add a student to a Student List.	
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STUDENT LOOKUP FILTERS PAGE (ADVANCED SEARCHES PAGE)

Using the Student Lookup Filters (Advanced Search)

By default, your **Student Lookup** page will populate your assigned student population, should you possess one.

The **Student Lookup** page doubles as your central population page as well as the page where you will be performing queries to identify student populations using set criteria as filters.

To perform a query, begin by clearing your assigned population by X-ing out the two filters automatically applied at the top of your *Student Lookup* page.

The population on this page will automatically refresh to show 0 students.

To view the available filters, click on the *Filters* button located on the right-hand side of the Student Lookup page.

Filters are categorized into subgroupings

- Name/ID
- Program
- Demographics
- Advisors
- Academics
- Enrollment History
- Enrolled Units

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If you have questions after reviewing this tutorial, please contact Advising Technology at <u>advtech@fiu.edu</u>.