FIU

Academic & Student Affairs

NEW Panther Success Network (PSN 2.0) Advisor Manual

Updated 3/28/2025

TABLE OF CONTENTS

PANTHER SUCCESS NETWORK IMPLEMENTATION QUICK START GUIDE

Terminology Changes

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

Tentative Platform Implementation Schedule

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

<u>**LOGGING INTO THE NEW PANTHER SUCCESS NETWORK**</u>

<table>
<tr>
<td>
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.**
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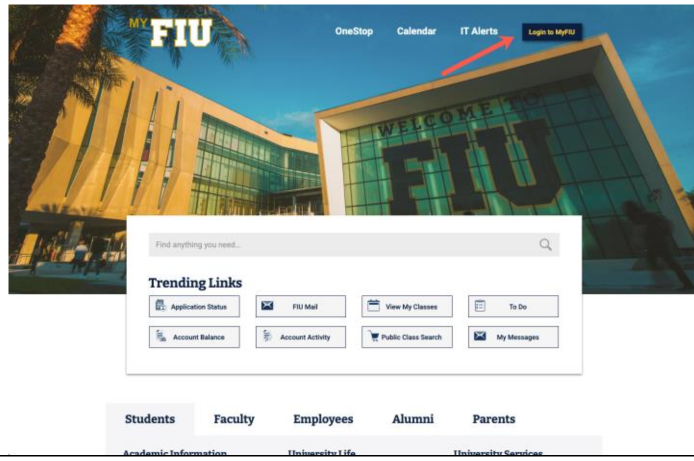

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<td>
Log in using your ***FIU Panther username and password.***
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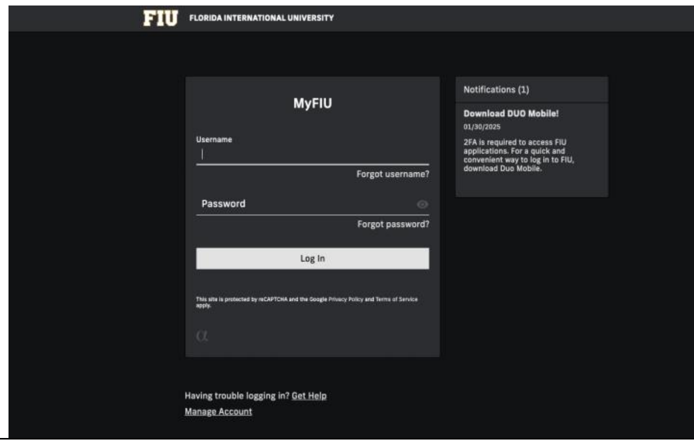

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Once you are logged in, select the ***Advisor*** option from the dropdown menu located at the top of your browser window.

Click on the ***Success Network tile.***
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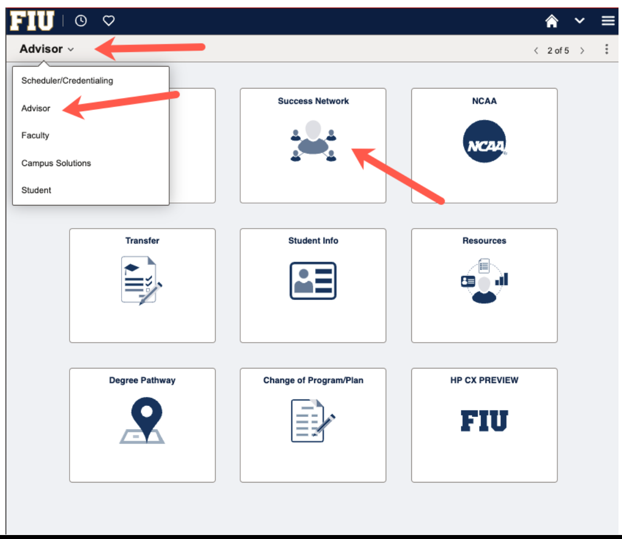

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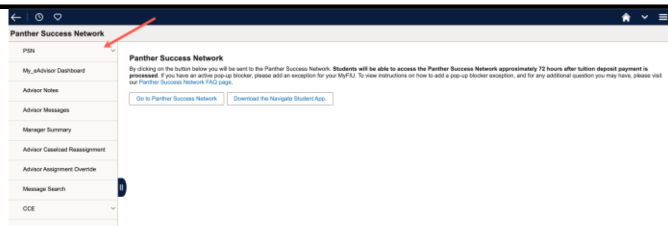
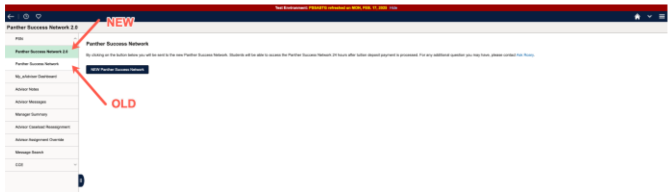
You will be redirected to the Success Network landing page.

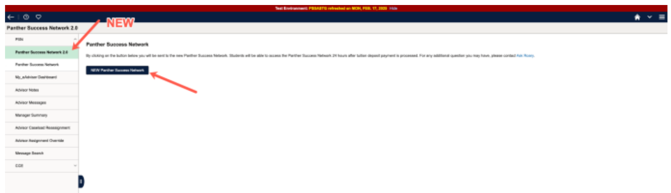
During the implementation transition, there will be two buttons on this page. Click on the PSN button to expand.

- **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 ***Dashboard*** will be your homepage to the NEW Panther Success Network.

From this page, you will see that each role you possess will have an assigned tab.

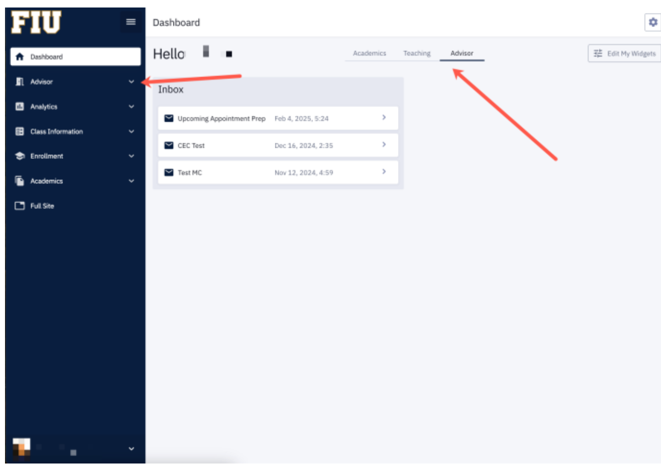
In the ***Advisor*** tab, you will find your Inbox. Here you will see your recently received messages sent by students on your assigned caseload.

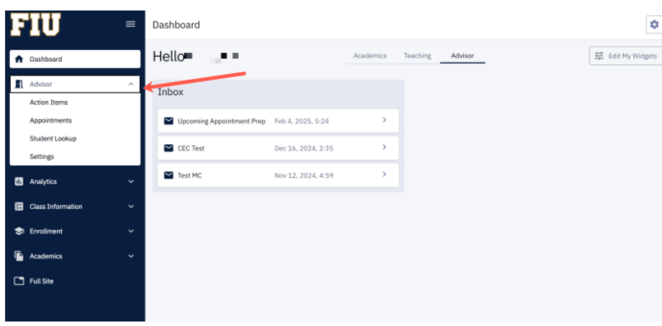
To the left, you will see the ***Main Menu.***

When expanded, the ***Main Menu*** will provide you with access to the areas of the PSN platform needed to perform your advising and administrative tasks.

Begin by clicking on the Advisor sub-menu.

Here you will find tabs that will redirect you to your ***Appointments, Action Items, the Student Lookup*** page or your Settings page.





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.

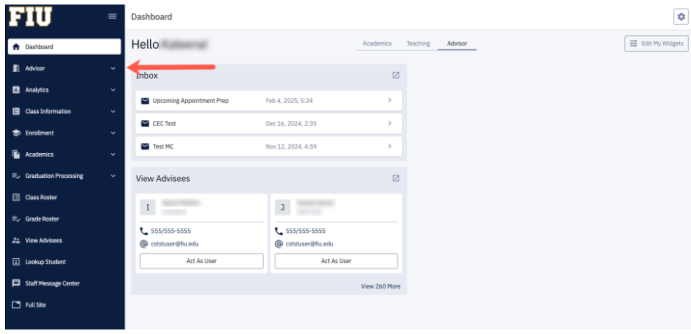
Each row can be expanded to provide more detail on each student, such as FIU OneCard photo, contact information, assigned staff, and a summary of student program/plan history.

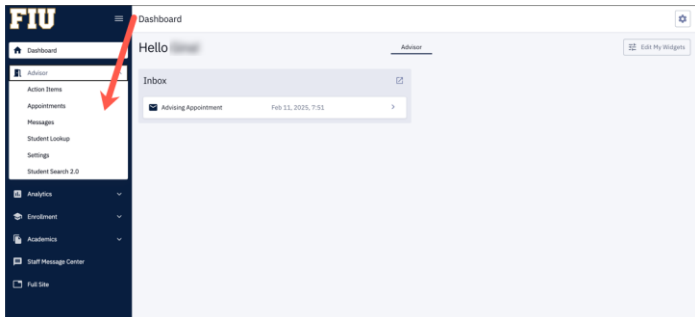
Within each row, you will:

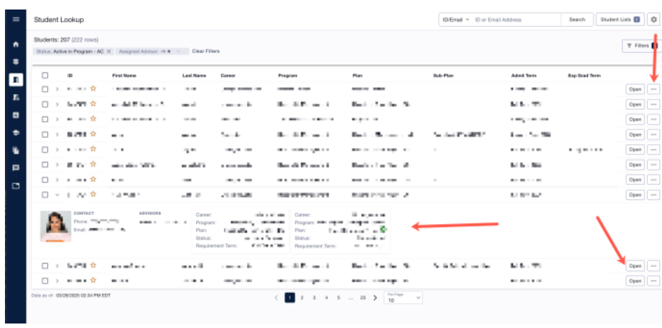
1)click on the ***Open*** button to the right of each row to be redirected to the Student Details (student profile) page

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







These functions can be done for students individually or in mass

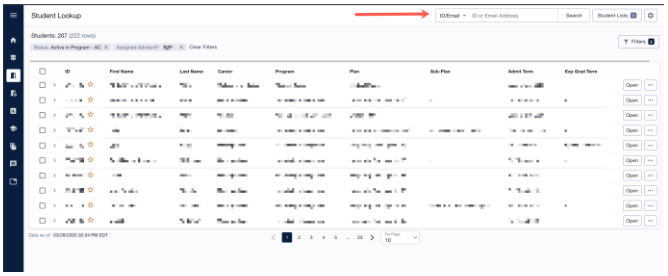
AND

3)view if a student has a ***Hold*** placed on their profile in Campus Solutions

THE SIMPLE SEARCH (QUICK SEARCH)

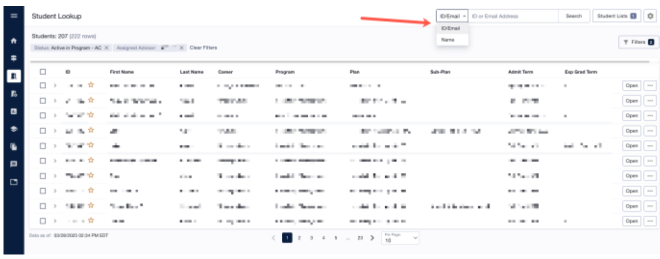
The ***Simple Search*** functions to provide an expedited way to navigate to Student Details pages.

The ***Simple Search*** function is conveniently located at the top of your browser window throughout the Panther Success Network platform. Pages such as the ***Student Lookup*** and ***Student Details*** page will feature the Simple Search box.



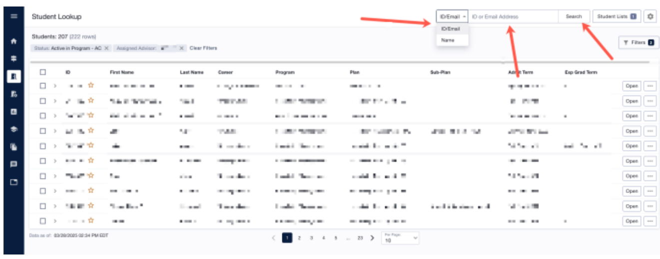
Currently, the ***Simple Search*** is limited only to students who are Active In Program.

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.



All students are searchable by name, Panther ID or email address.

You will find a dropdown menu where you can toggle between each type of identifier.



You are also not limited to searching only withing your assigned student population.

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.

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:

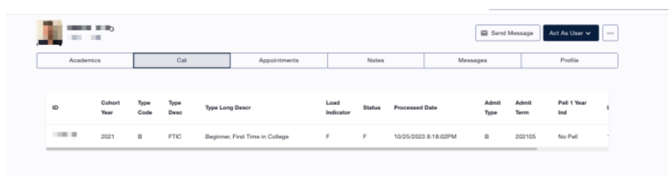
- Academics
- Categories (PSN 1.0 equivalent. Name to be finalized)
- Appointments
- Notes
- Messages
- Profile

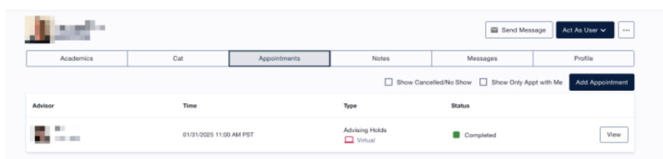
Within the first tab, the ***Academics tab***, you will find information pertinent to the students' Academic and Educational Career and Progress. Items such as important identifiers like Academic Plan history, Cumulative GPA, Cumulative units, Assigned Advisors, Class schedule, Grades, Student Groups,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





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

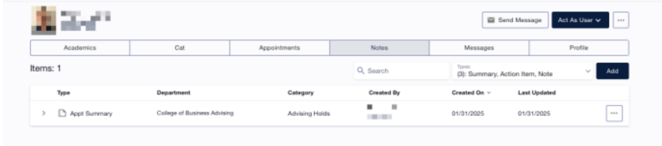
The fourth tab, ***Notes***, houses a combination of all documents attached to the student being viewed. Appointment summary reports, Notes (comments), course-based Action Items and non-course-based Action Items (departmental referrals) will be found here.

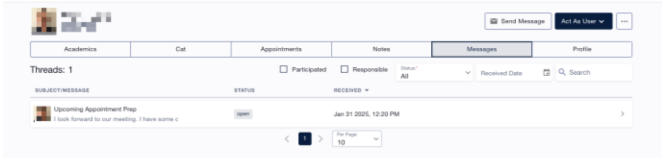
The fifth tab, ***Messages***, will provide you with access to all messages exchanged with the student. With future enhancements being made to this component of the platform, read only access will be established and your ability to edit a message thread is dependent on your security settings.

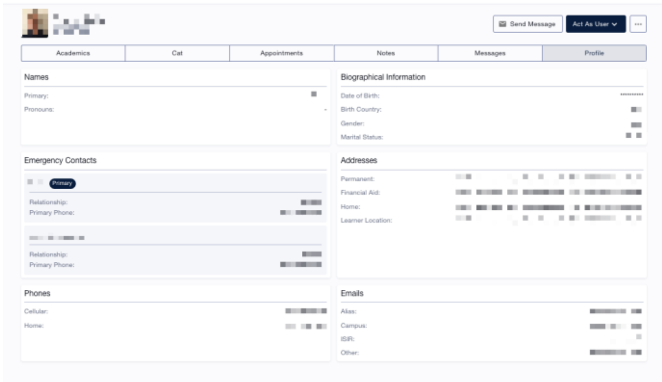
The last tab, ***Profile***, is where you will find contact and biographical information for this particular student.

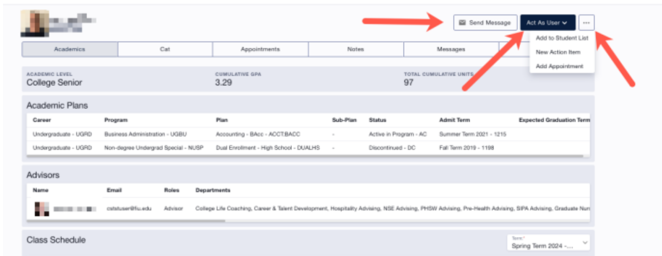
From within the ***Student Details*** page, you will be able to perform certain functions:

- 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





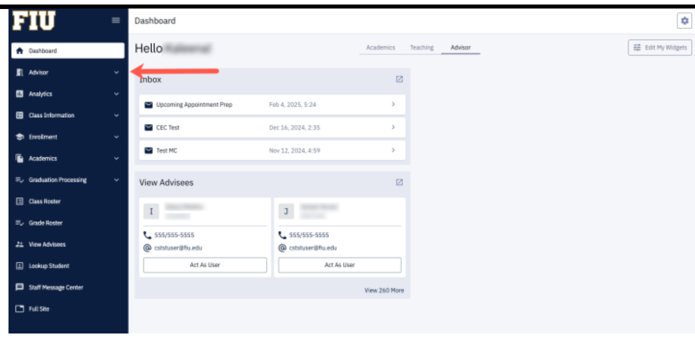




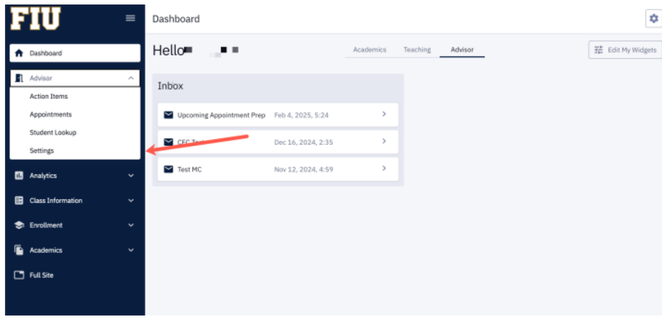
OUTLOOK CALENDAR SYNC

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.

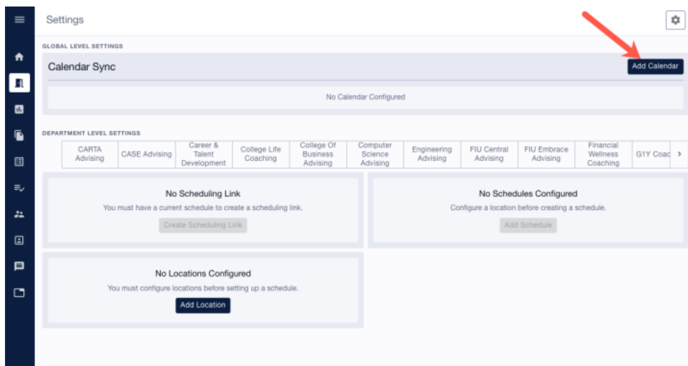


In this expanded bracket, you will now find ***Settings*** listed.

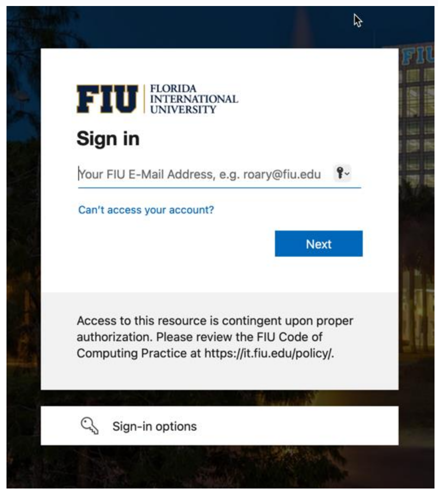


You will be redirected to your personal settings page. This is the page where you will create your Advisor Schedule and establish your Calendar Sync.

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

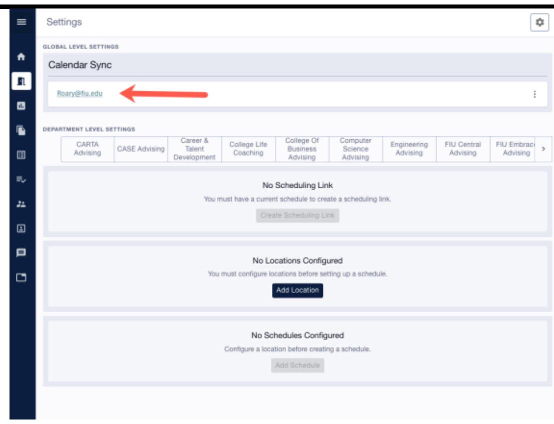


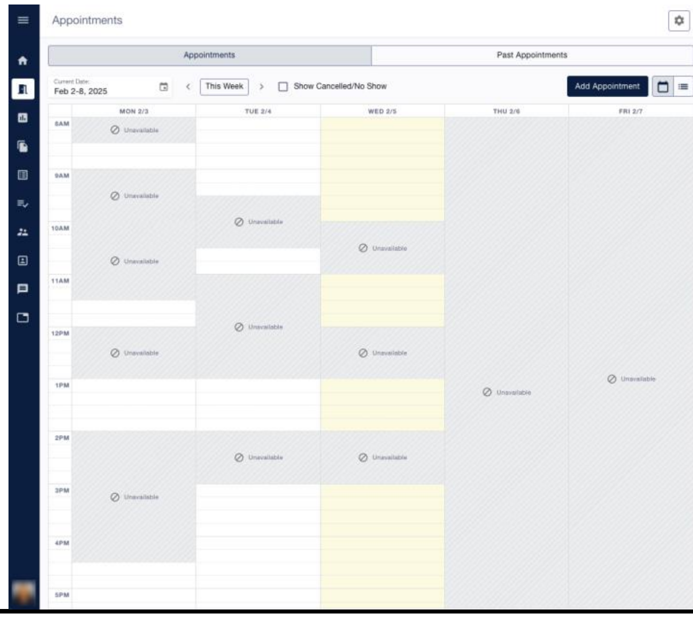
For the initial calendar sync, you will be prompted to enter your FIU credentials to confirm the connection between Outlook and the Panther Success Network (PSN) platform.



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

Any blocks or times already confirmed will read as “Unavailable” as seen in the image to the right.





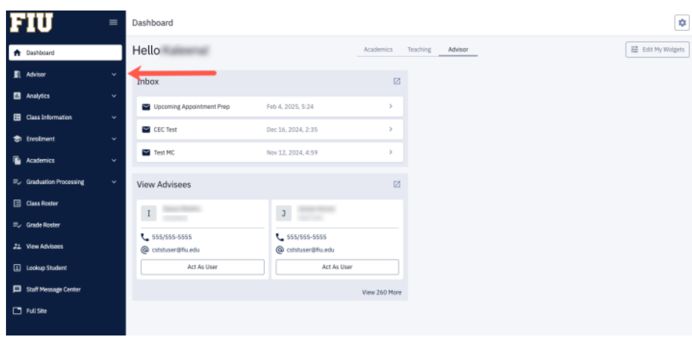
YOUR SCHEDULE (APPT AVAILABILITY)

Creating Locations for your Schedule (Appointment Availability)

Your ***Schedule*** will provide the Panther Success Network platform with essential information regarding your advising schedule.

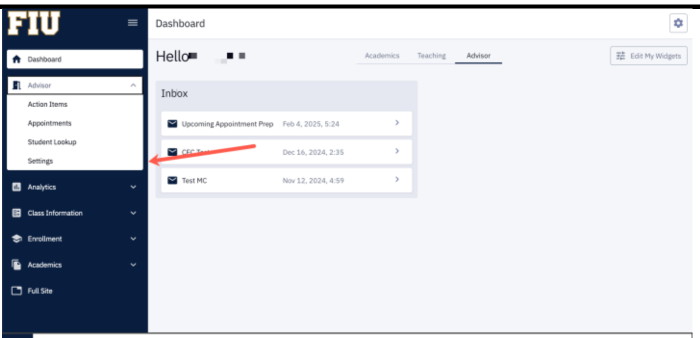
Your selection of dates and times in conjunction with the Outlook Calendar sync will provide the platform with the ability to communicate open appointment times to students when scheduling their advising sessions.

To create your ***Schedule***, first click on the **Advisor** submenu located on the lefthand side of your CX dashboard browser window.



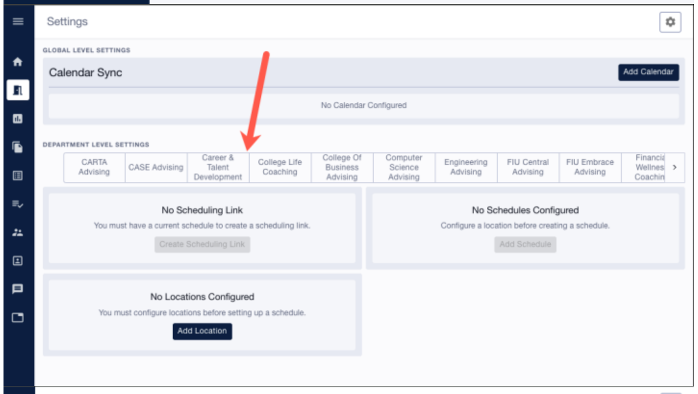
In this expanded bracket, you will now find ***Settings*** listed.

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.

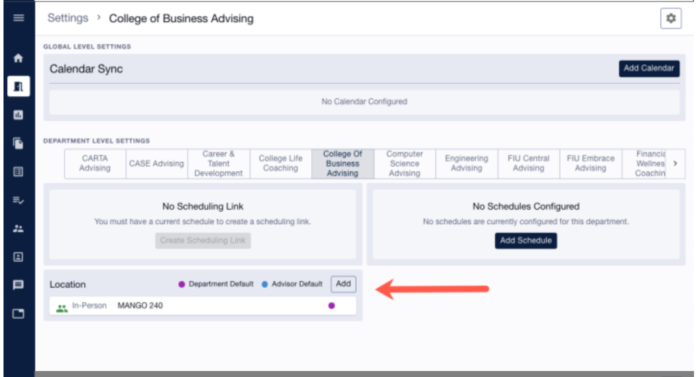


From the list of Departments listed, **select the Department that you belong to.** This Department is from where you will create and document advising sessions, send messages, and more.

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.



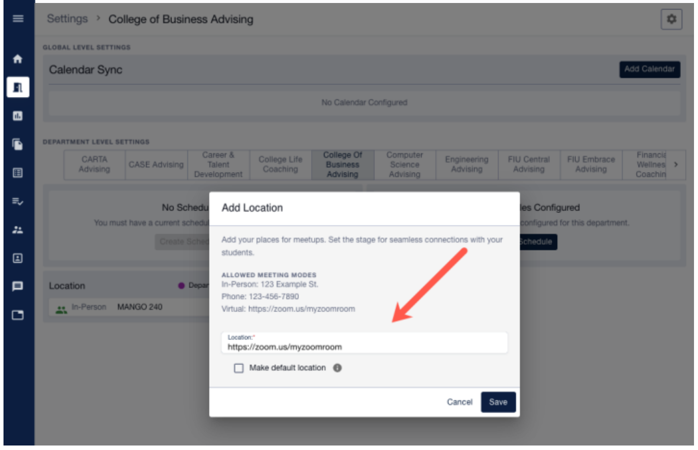
For each ***Department***, you will find Default Location(s) have been created. This will allow you to already have a ***standardized in-person location*** created on the platform.



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.

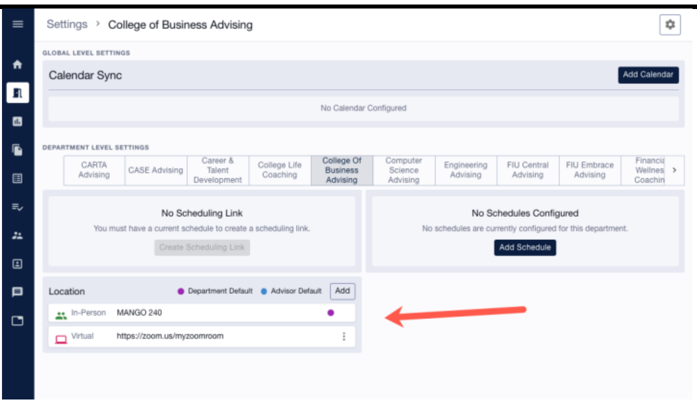
To add a new location, for virtual or phone advising sessions, click on the ***Add*** button. A pop-up will appear. Type in the Zoom URL that will be used in the text box.



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.



Creating your Schedule (Appointment Availability)

To create your ***Schedule,*** begin by selecting the Department where your advising sessions will be housed.

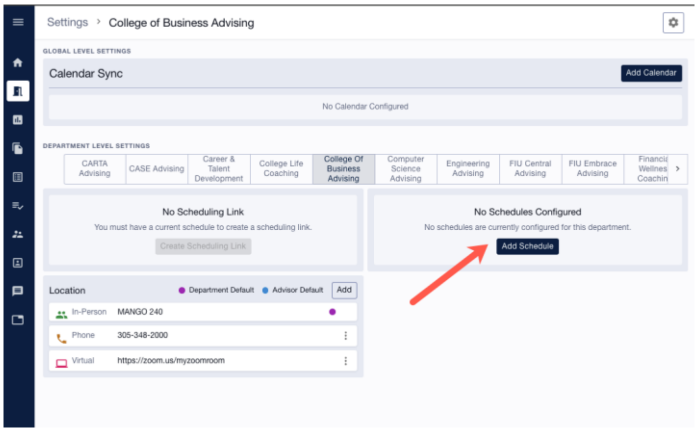
Click on the ***Add Schedule*** button.

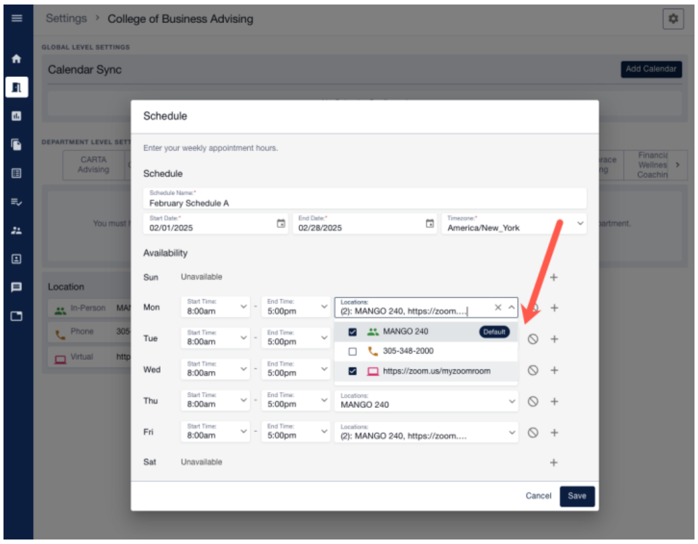
A pop-up will appear. You will now make the appropriate selections to reflect your chosen work schedule. Select the following:

- Date range
- Weekdays that advising sessions being offered
- Time ranges for each weekday
- Location(s) that apply to each line

When your selections are complete, click on the ***Save*** button to confirm.

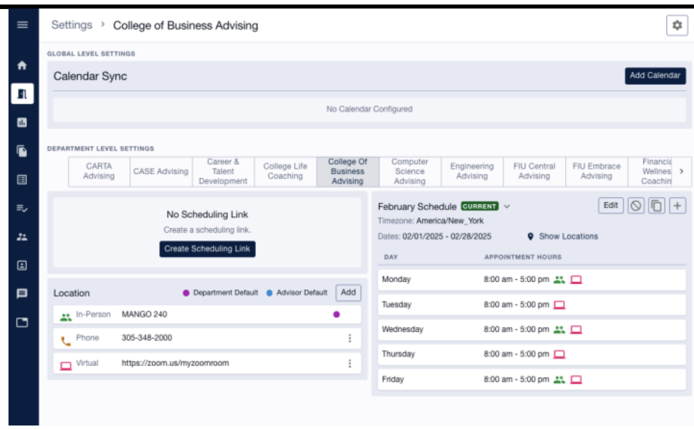
If you would like to create multiple schedules, repeat the overall process for each date range as needed.





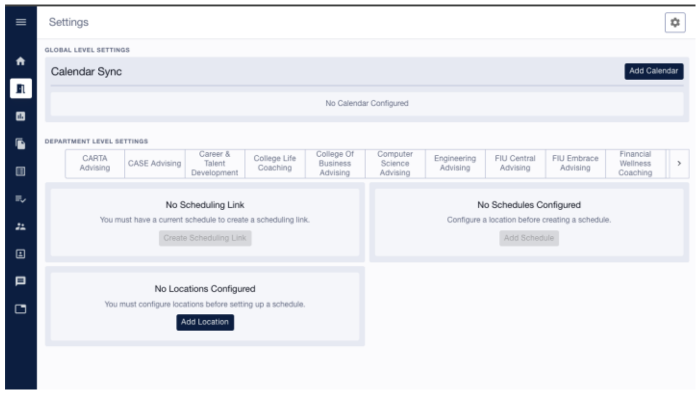
Note:
Moving forward, the advising community is to have their ***Schedule*** created for 1 whole semester at a time. This is to ensure that sufficient appointments are available for students to select from at all times. While your ***Schedule*** will be created for the term, students will only be able to schedule appointments

in accordance with departmental appointment restrictions and settings.



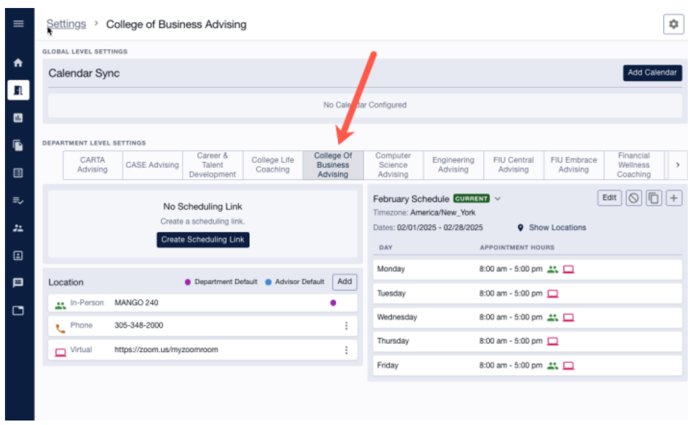
Editing your Schedule (Appointment Availability)

To edit your ***Schedule,*** begin by navigating to your ***Settings*** page.



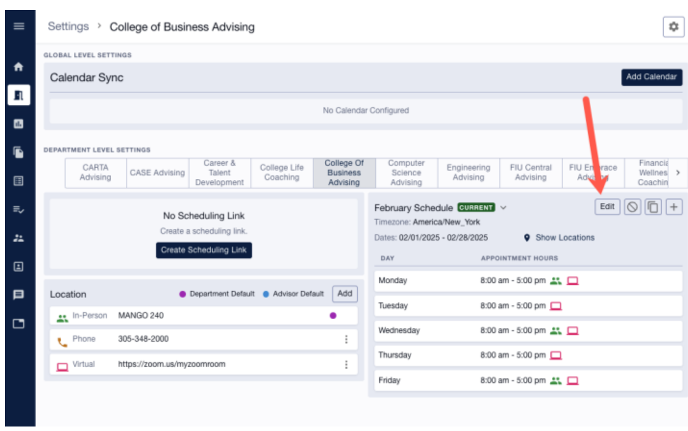
Select the ***Department*** where your ***Schedule*** was created.

You will now see the ***Schedule(s)*** that you have already created.



Click on the ***Schedule*** that you wish to edit.

Click on the ***Edit*** button.

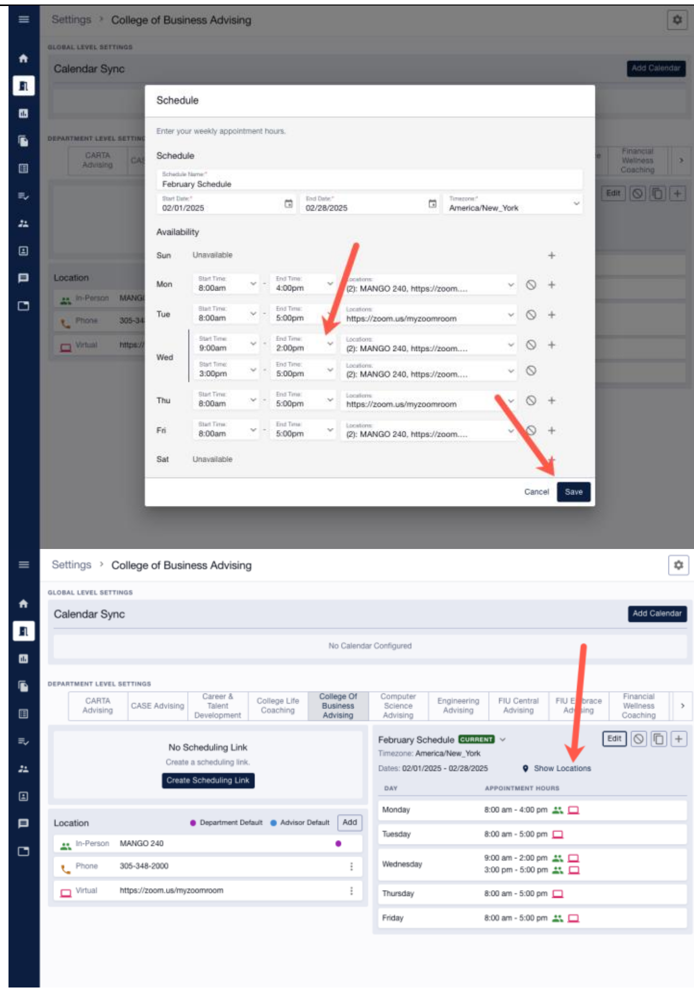


A pop-up with your ***Schedule*** will open.

Make all the necessary changes to reflect the advising session offering you wish to extend to students.

When you are satisfied with the changes made, click on the ***Save*** button to confirm.

Your edited ***Schedule*** will appear reflecting the new changes immediately.

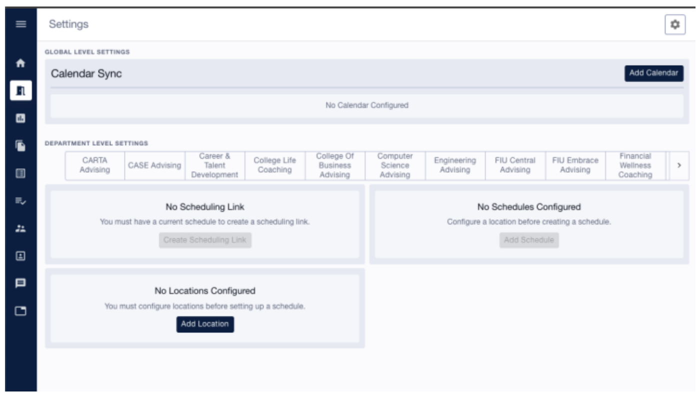


Deleting your Schedule (Appointment Availability)

To delete your ***Schedule***, begin by navigating to your ***Settings*** page.

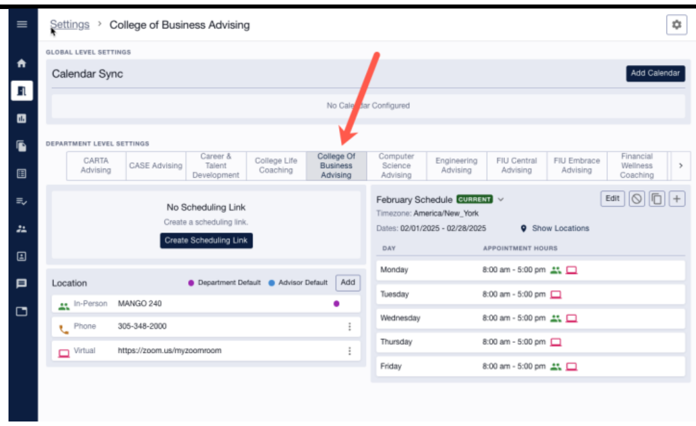
Select the ***Department*** where your ***Schedule*** was created.

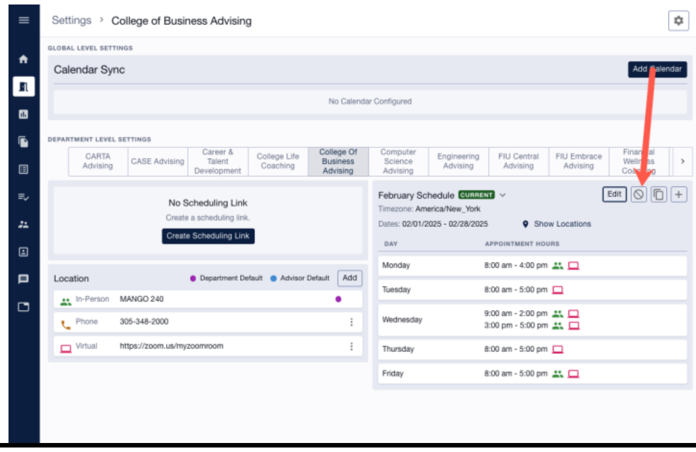
You will now see the ***Schedule(s)*** that you have already created.



Click on the ***Schedule*** that you wish to delete.

Click on the  button.





THE SCHEDULING LINK (PERSONAL AVAILABILITY LINK)

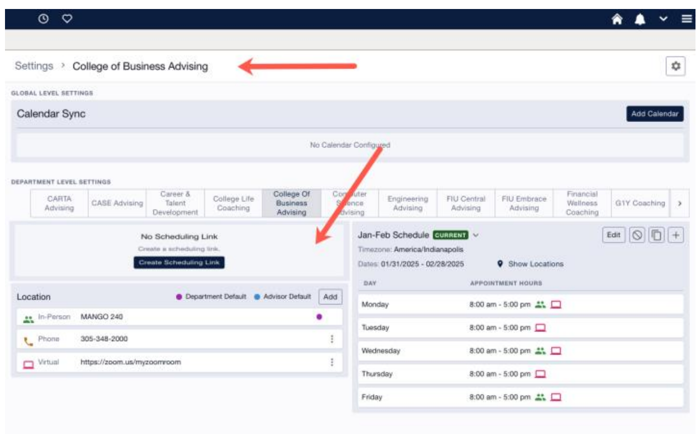
A ***Scheduling Link*** is available for you to provide to students to facilitate the scheduling of advising sessions.

The ***Scheduling Link*** will be tied to your ***Schedule*** and is customized to your availability within a department.

Each advisor will have their own Scheduling Link.

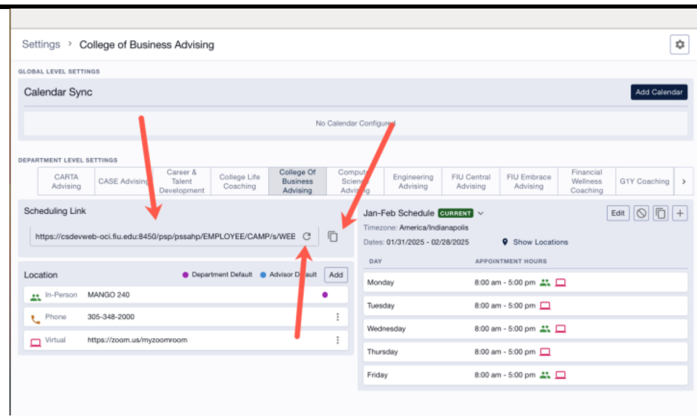
To create your ***Scheduling Link,*** navigate to your ***Settings*** page.

Click on the ***Create Scheduling Link*** button.



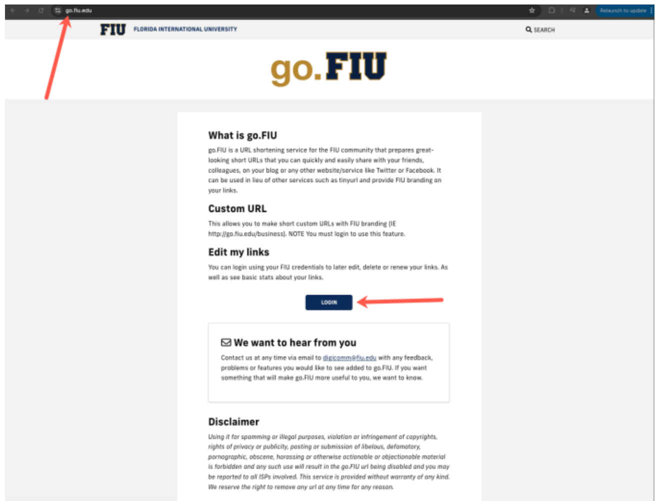
You will be able to copy this link and refresh it as needed.

Please note that if you should ever refresh your ***Scheduling Link,*** the previously created link will be deactivated and will no longer be tied to your Schedule.



CREATING YOUR FIU GO-LINK

To facilitate the distribution of your PSN Scheduling Link, a FIU Go-link can be created. Begin by navigating to https://go.fiu.edu
In your internet browser.



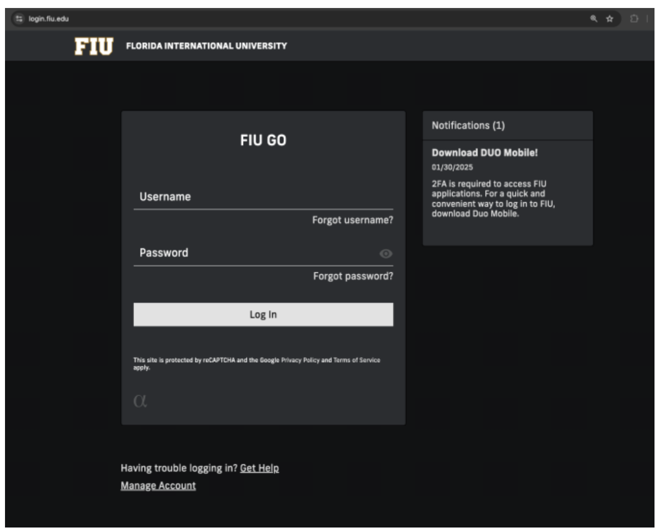
Click on the 

button.

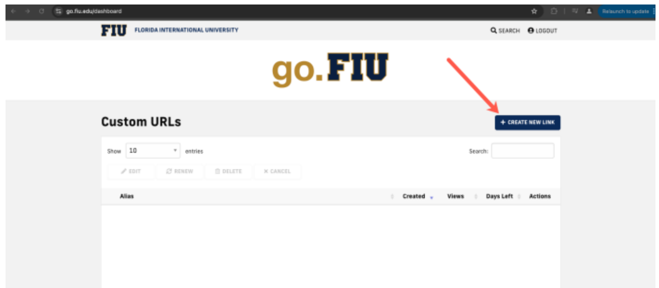
You will be redirected to the FIU GO login page.

Log-in using your FIU username and Password.

You will be asked to use two factor authentication.

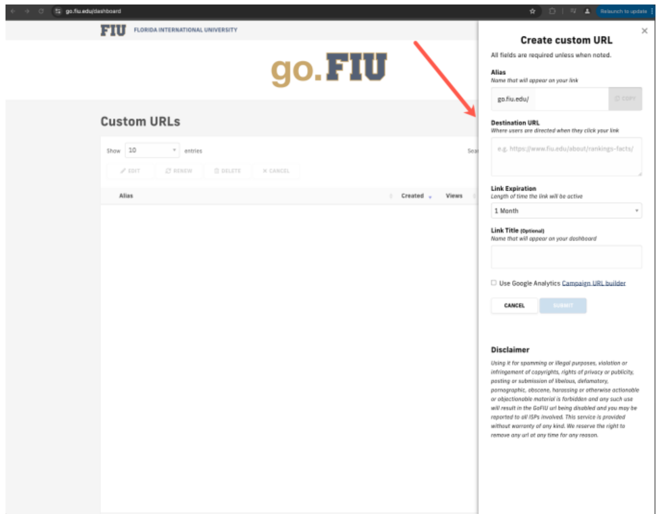


Once logged into the website, you will view your go.fiu Custom URLs Dashboard.



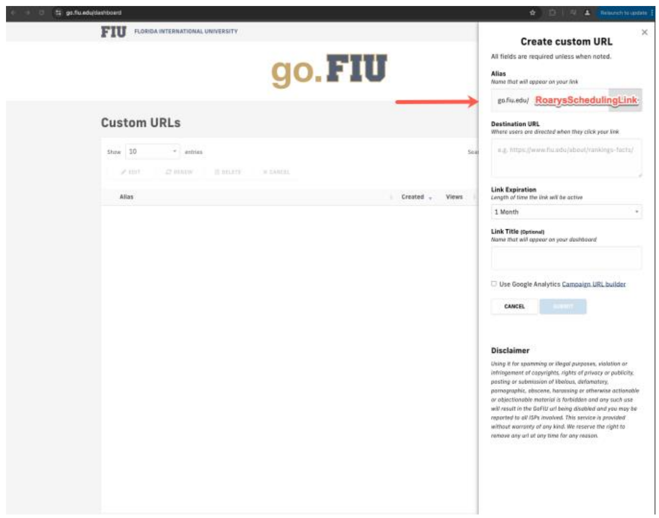
To create a new go-link, click on the **+ CREATE NEW LINK** button.

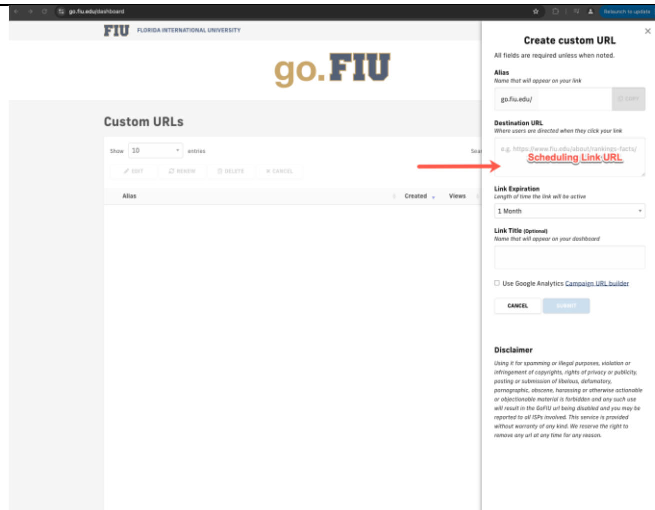
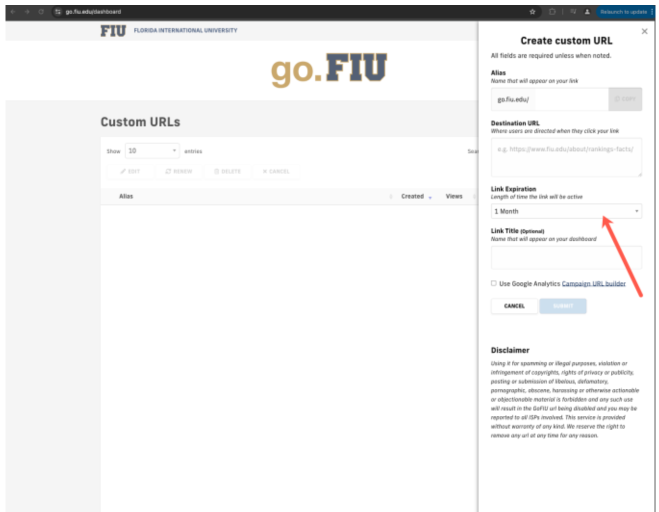
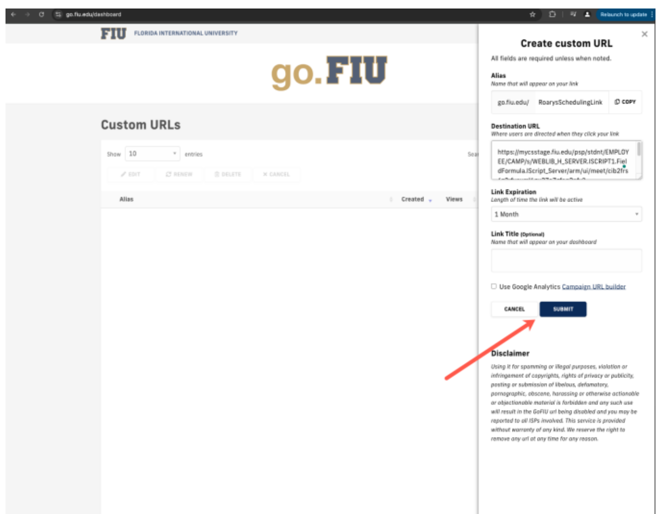
A pop-up will appear on the righthand side of the dashboard.



Begin by typing in your specified go-link's unique identifier.

For example: if you would like for your go-link to read go.fiu.edu/RoarysSchedulingLink, you will type in “RoarysSchedulingLink” into the Alias box to the right.



Next, Copy and Paste your Scheduling link into the Destination URL text box to the right.	
Determine how you would like this go-link to be active. You will be able to select between 1 month, 3 months, 6 months and 1 year from the dropdown menu.	
When ready, click on the SUBMIT button to create the 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

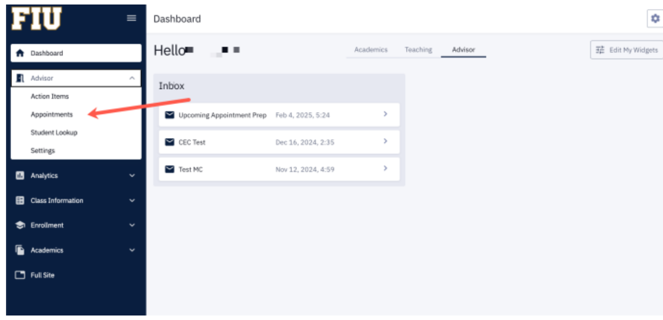
Additionally, if you click on an advising session, details such as the following will be available to you:

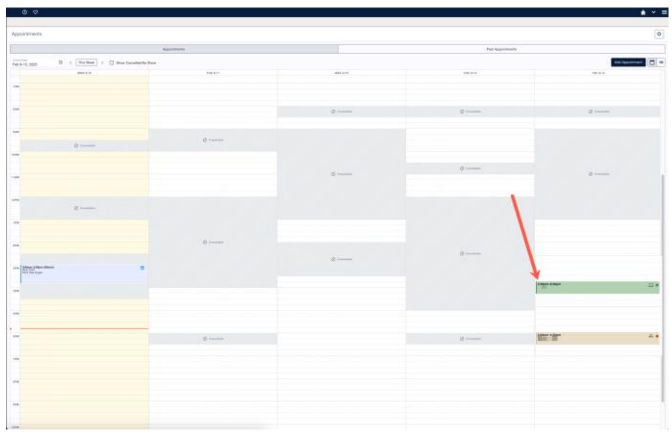
- Student Name & Panther ID
- Date/Time
- Modality
- Appointment reason and Comments

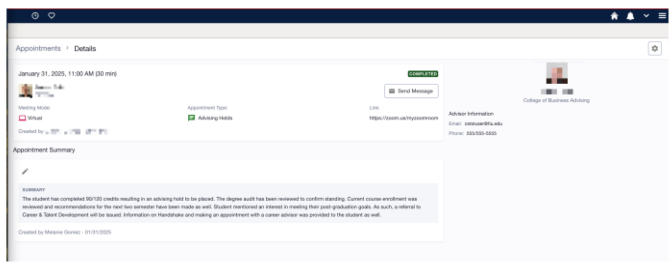
Advising sessions that have an attached Appointment Summary Report are classified as Completed and are marked with a Green Dot.

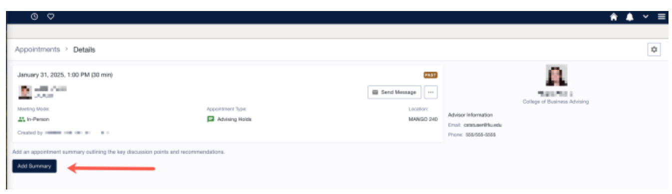
Advising sessions pending an Appointment Summary Report are considered Incomplete. These are marked with a Red Dot.

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

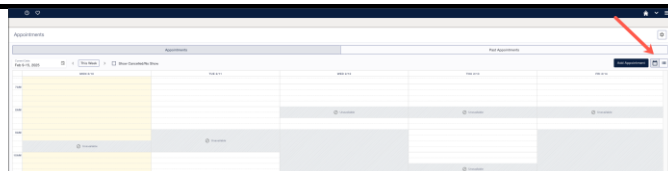








Appointments history can be viewed in Calendar or List format. To switch between these views, click on the  button found on the upper right corner of your PSN Appointments page.



THE MESSAGE CENTER

Viewing your Message Center (Conversations)

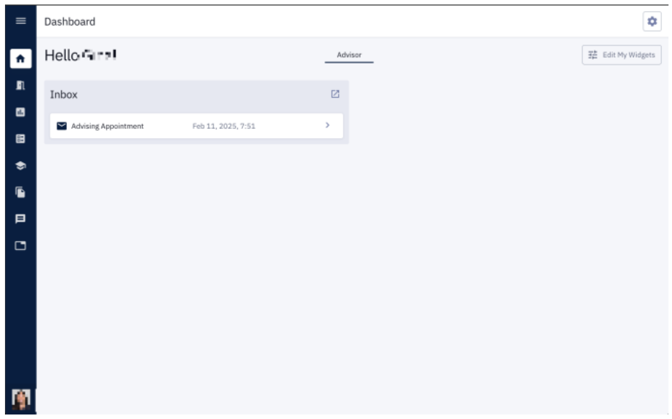
From your CX Dashboard, you will conveniently be able to access the entirety of the messages that have been exchanged from within your ***department*** on the platform.

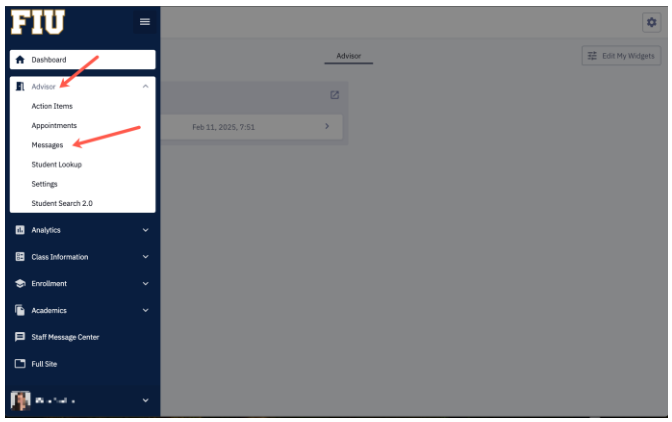
To navigate to your Inbox, begin by clicking on the ***Advisor*** menu so that it expands.

Click on the Messages option.

You will be redirected to your Inbox.

From your Inbox, you will have access to all ***Messages*** that originated inside of the ***Department*** selected when it was being composed.



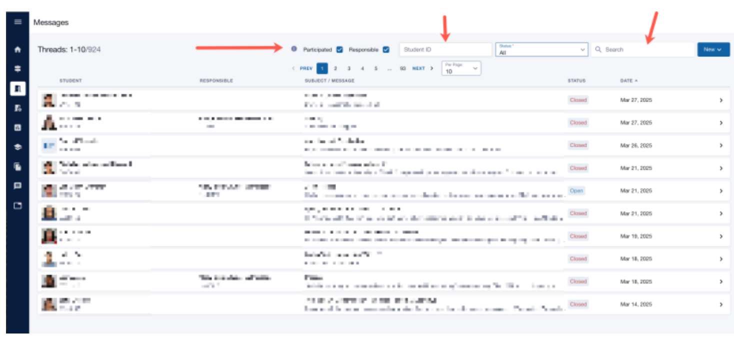


By default, you will find two boxes (Participated and Responsible) will be checked.

This setting is intended to filter out the messages that pertain to your personal advising responsibilities.

A message is designated as ***Responsible*** when you are the designated recipient of the message. By default, you will receive messages initiated by students only if you are a student's assigned academic advisor.

A message is designated as ***Participated*** when you contribute to the thread of messages. For example, a message that you receive and respond to is considered a thread where you are a participant.

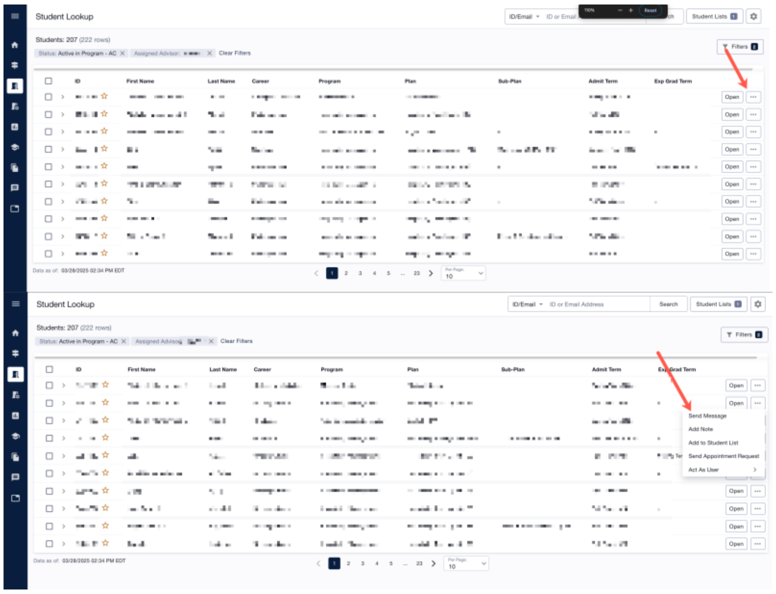


At the top of your ***Messages*** page, you will find the ability to search for students by Panther ID or Name.

Creating a new Message

New messages can be created from various locations on the Panther Success Network platform.

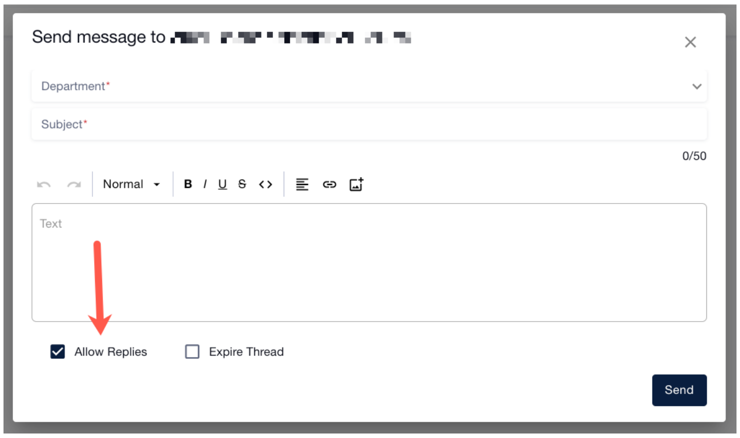
1) From the Student Lookup page



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 queries by selecting filters to identify students that match certain criteria.

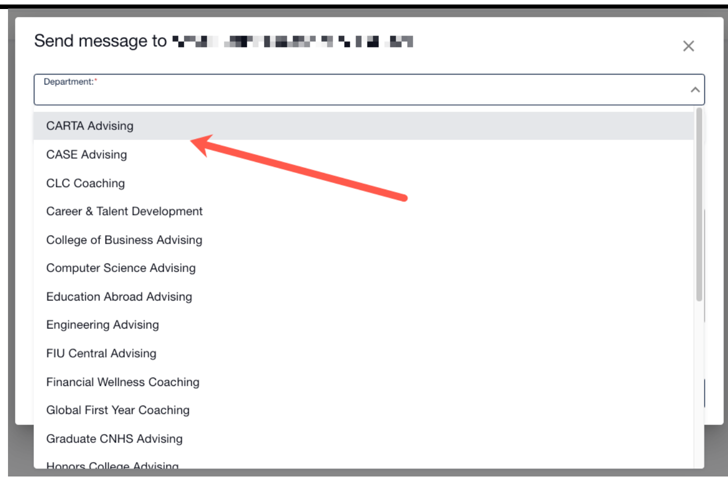
From your ***Student Lookup*** page, you will find the ··· button. You will find various functions can be performed by clicking on this button.

Select the ***Send Message*** option from the list of options.



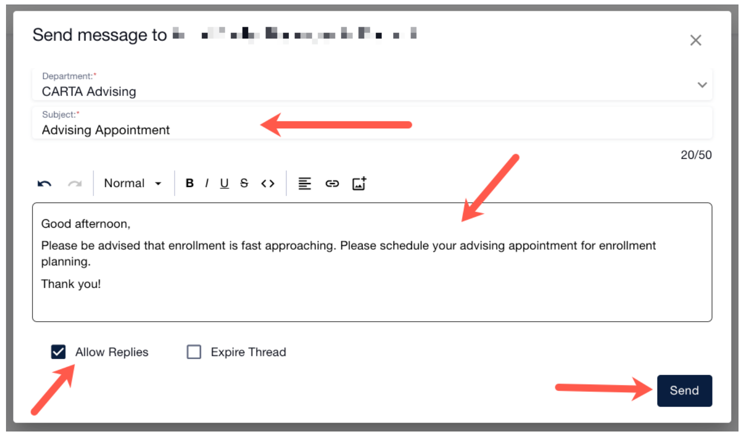
A pop-up will appear.

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.

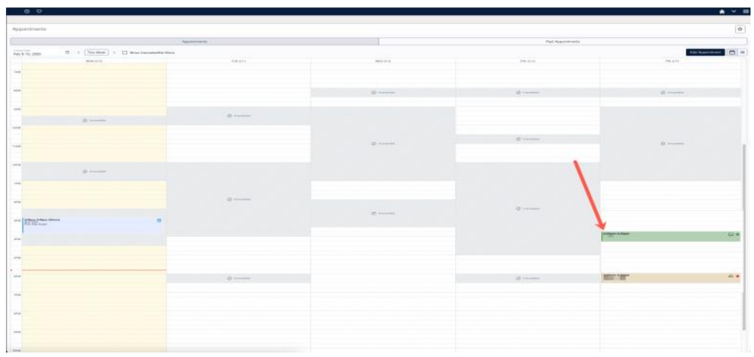
Click on the  button when you are done composing the message.



2) From your Appointments page

A shortcut is embedded inside each advising session on your ***Appointments*** page. Here, you can send a message to these students should it ever be necessary.

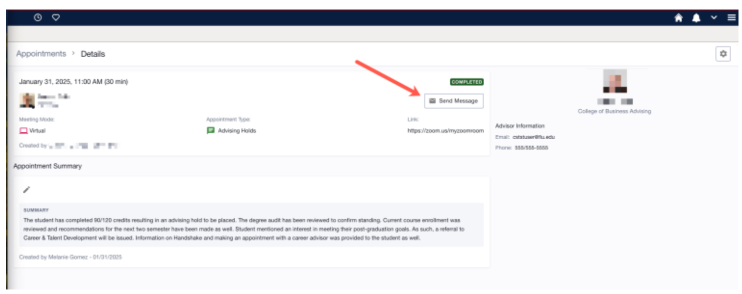
To begin, click on the appropriate advising session from your ***Appointments*** page.



Doing so will open the calendar event.

From inside the calendar event, you will be able to send a message to the student.

Click on the ***Send Message*** button.



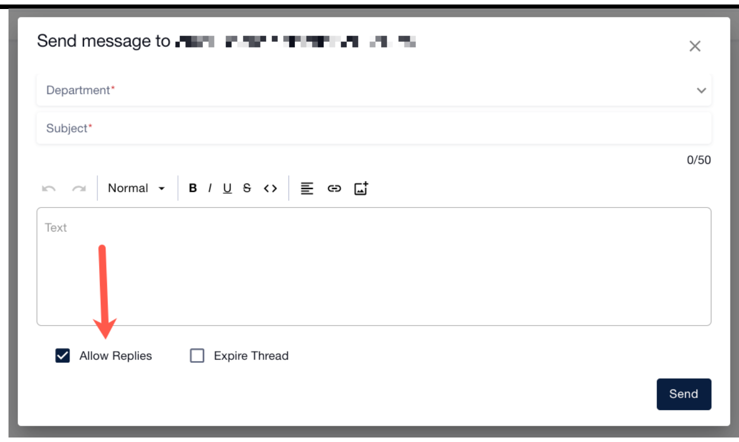
A pop-up will appear.

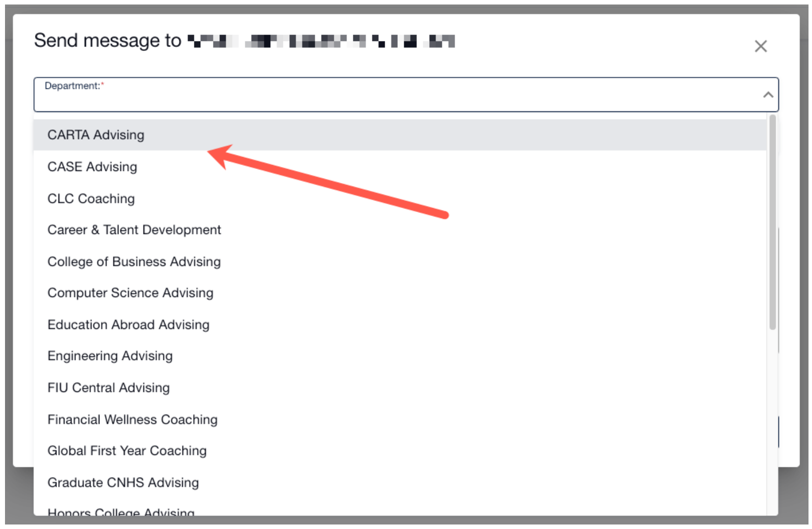
Begin by selecting the ***Department*** that you are composing this message for. You will find a dropdown menu of the ***Departments*** that you possess access to composing messages.

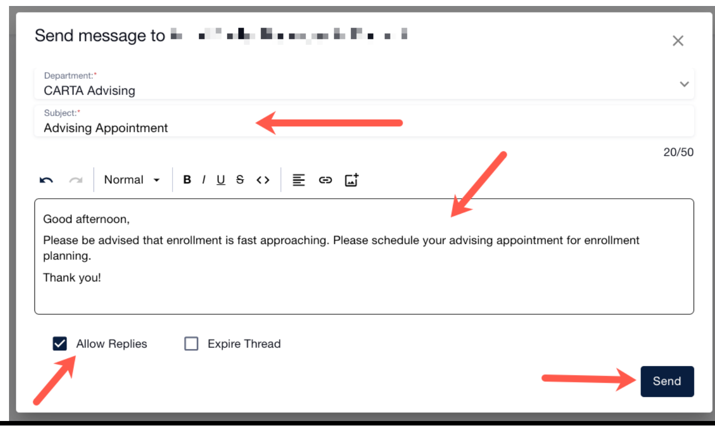
Compose the subject and body of the message.

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.***

When ready, click on the ***Send*** button.







Creating a new MASS Message

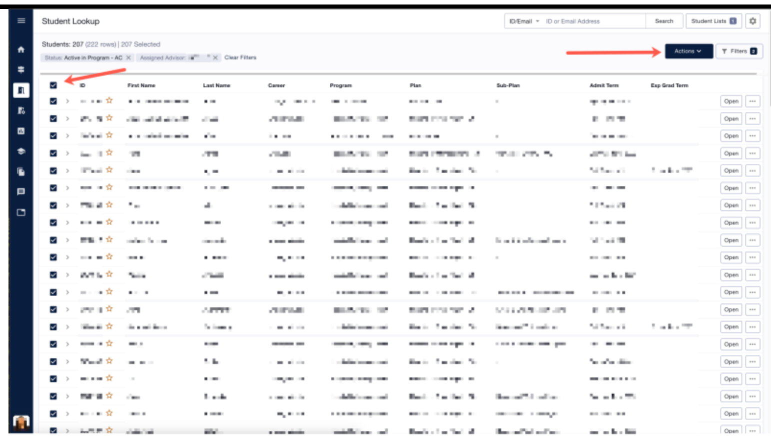
Using your ***Student Lookup*** page, sending a message to several students is simple to do.

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 

button located to the left of the ***Filters*** button.



Various options will open from this button.

Select ***Send Message*** from the list.

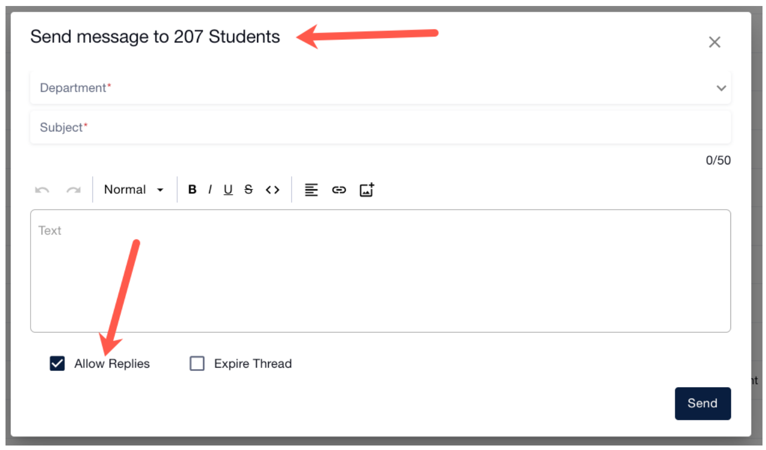
A popup will appear.

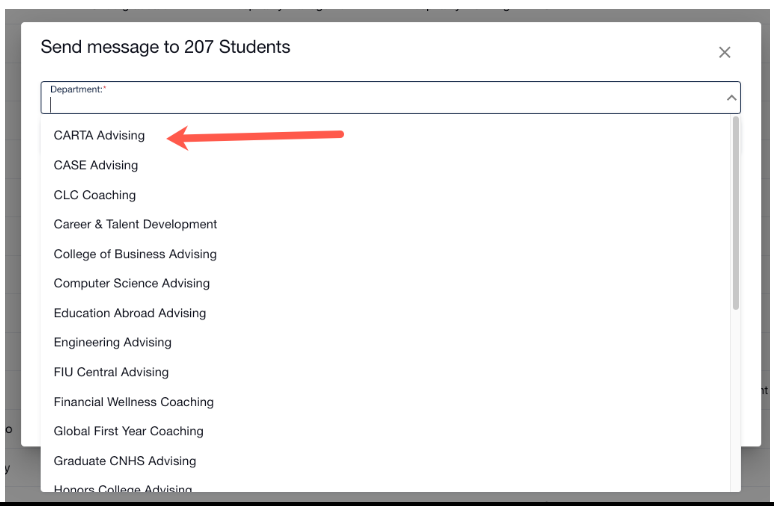
Select the ***Departmen***t from which you will be sending this message.

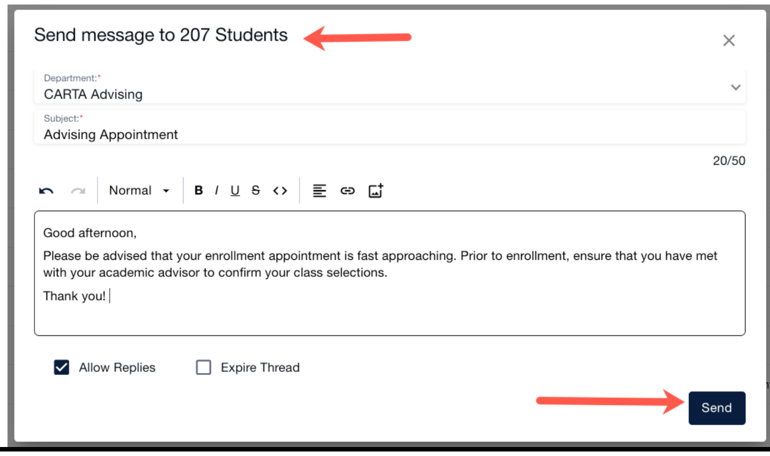
Compose the message intended for this group of students.

When ready, click on the ***Send*** button.

Students will receive this message as a blind copy.

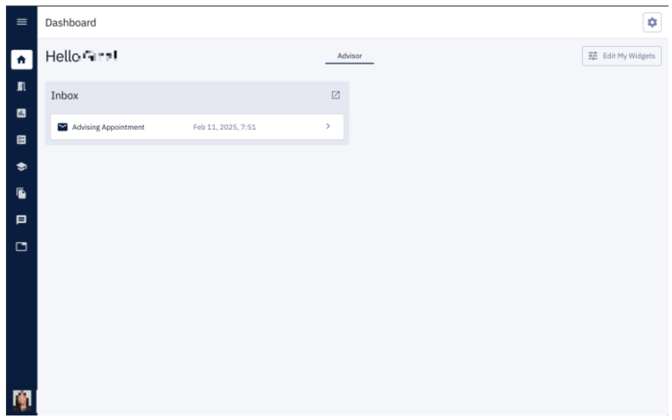






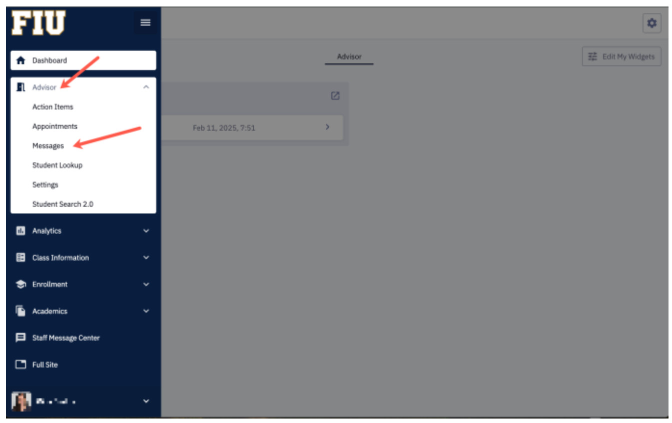
Responding to a Message Received from a Student

From your CX Dashboard, you will conveniently be able to access the entirety of the messages that you have exchanged in your Department.



To navigate to your Inbox, begin by clicking on the ***Advisor*** menu so that it expands.

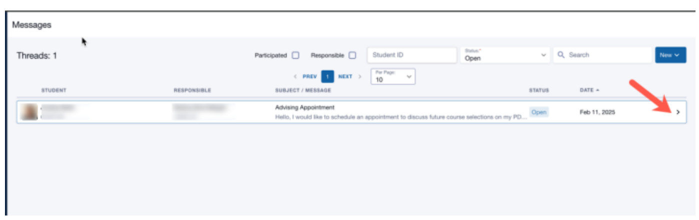
Click on the ***Messages*** option.



You will be redirected to your Inbox.

From your Inbox, you will have access to all ***Messages*** that originated inside of the Department selected when it was being composed.

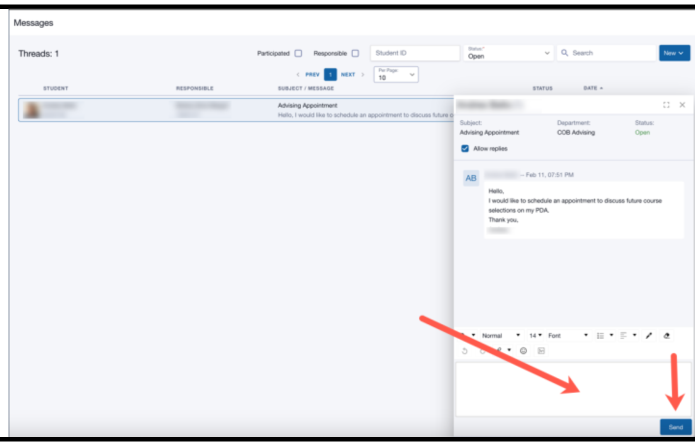
To respond to a message received, click on the message of interest.



A popup containing the message thread will appear.

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.

1) From your Appointments page

Begin by navigating to your ***Appointments*** page. You will see the ***Appointments*** page listed in the ***Advisor*** submenu on your *PSN Dashboard.*

Click on the ***Appointments*** option in the submenu.

You will be redirected to your ***Appointments*** page.

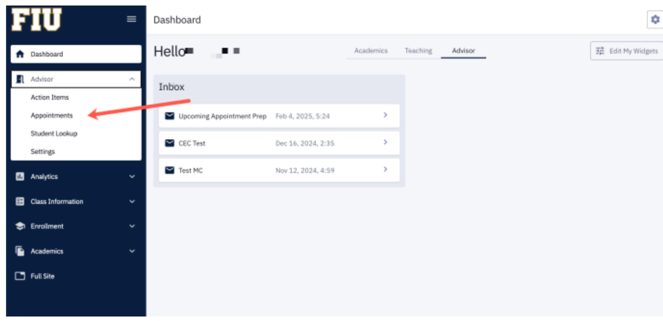
Located at the top right corner of the page, you will find the ***Add Appointment*** button.

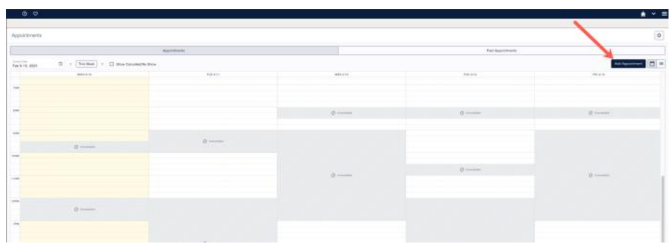
Click on the ***Add Appointment*** button.

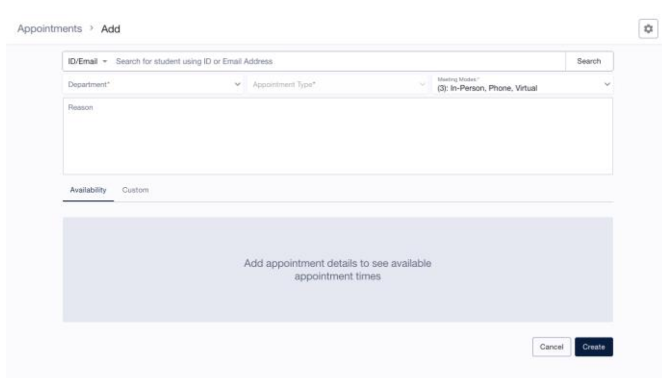
You will be redirected to provide scheduling details for this advising session.

Provide the following information:

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

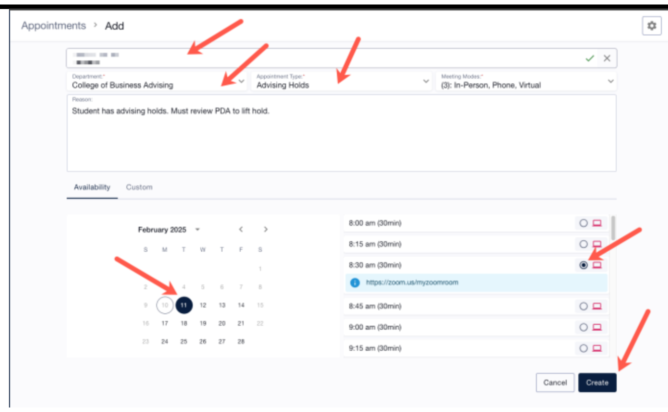






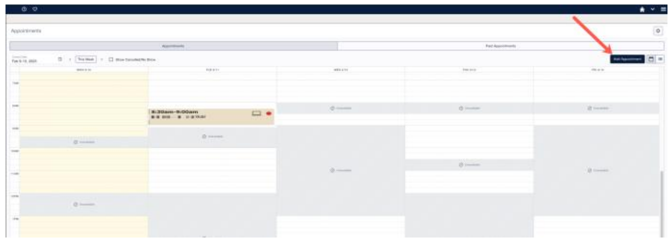
A calendar will appear listing available appointment times.

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



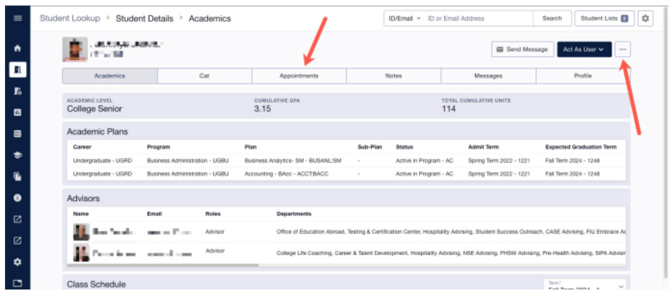
When ready, click on the ***Create*** button to confirm.

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.

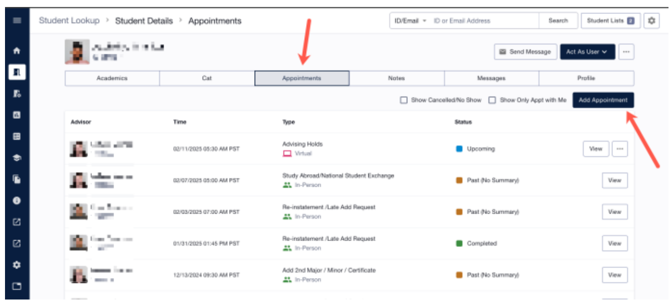


From inside the ***Student Details*** page, you will be able to schedule an advising session from one of two locations:

- The ***Add Appointment*** button in the Appointments tab

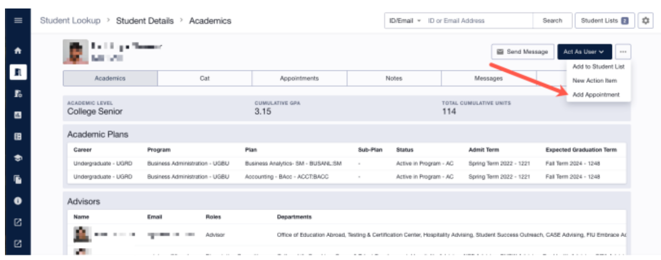
OR

- The ··· 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:

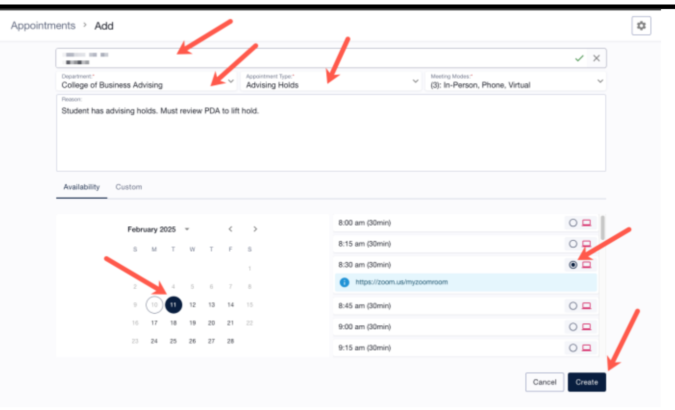
- Student name/Panther ID or FIU email address
- Department
- Appointment Type / Reason
- Modality
- Comments (if necessary)

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.

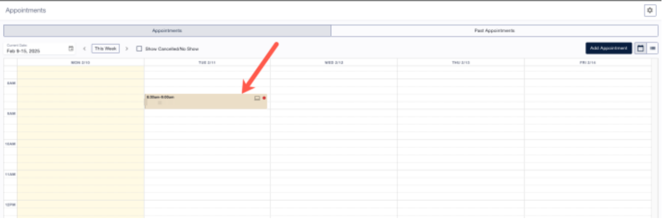


APPOINTMENT SUMMARY REPORTS

Creating an Advising Appointment Summary Report for a <u>Scheduled</u> Advising Session

Begin by navigating to your ***Appointments*** page and selecting an advising session that was previously scheduled.

Click on the calendar event you have selected.



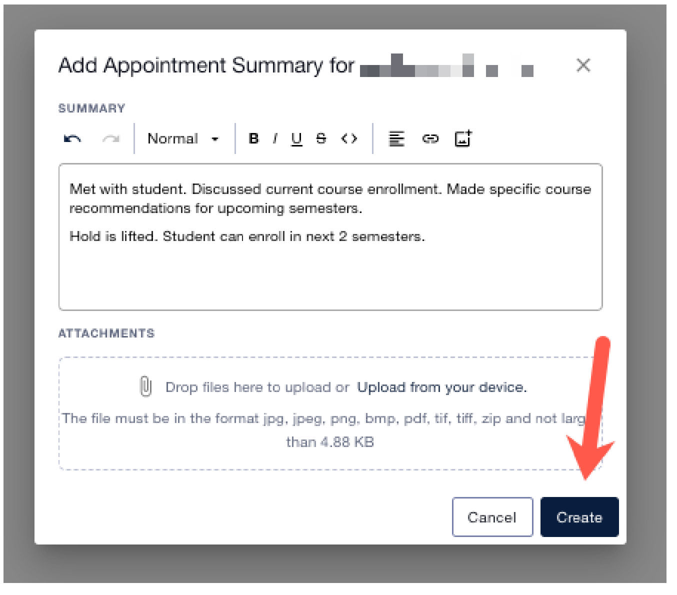
You will be redirected to the ***Appointment Details***.

Click on the ***Add Summary*** button.

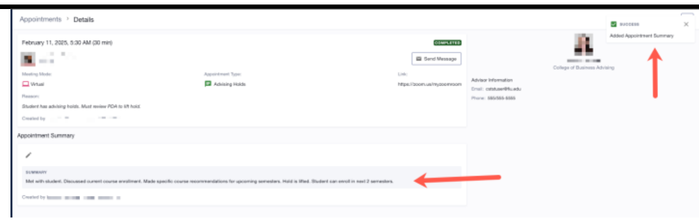
A popup will appear.

Type in the appropriate comments to document your conversation with the student.

Click on the ***Create*** button to submit the report.



The ***Appointment Summary Report*** comments will automatically appear below the appointment.



Creating an Advising Appointment Summary Report for a Drop-In Advising Session

Drop-In advising sessions, as we know, are not scheduled prior to the time that you meet with a student.

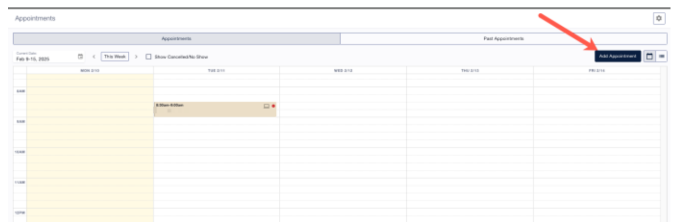
The process of documenting your drop-in advising session is like that of creating an advising session from the Calendar.

A drop-in advising session can be created through either:

1) your Appointments page

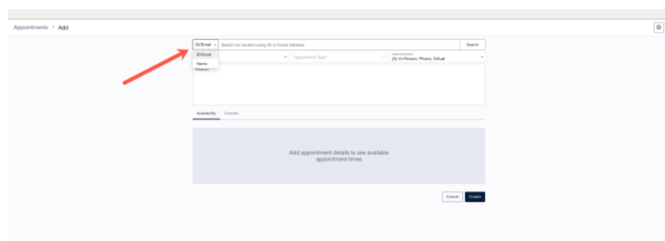
Begin by navigating to your ***Appointments*** page.

Click on the ***Add Appointment*** button located at the top right corner of your Appointments page above the Calendar.



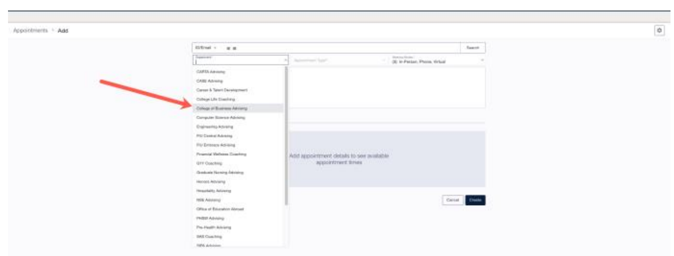
You will be redirected. To search for the student that you wish to create this appointment instance for, enter either the student's Name or Panther ID or FIU email address. Select the type of identifier you are entering by using the dropdown options menu.

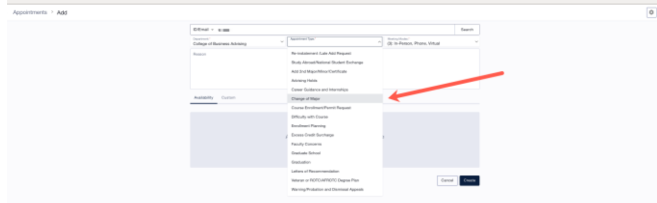
Click ***Search.***

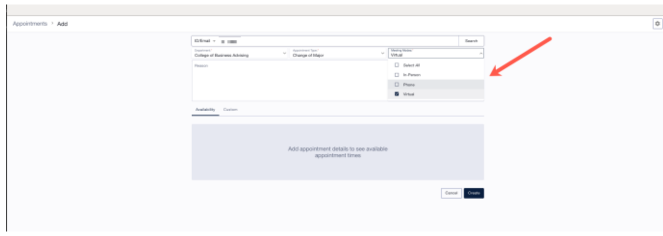


You will see three dropdown menus. Select from the menus below the ***Student Search*** bar:

- 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

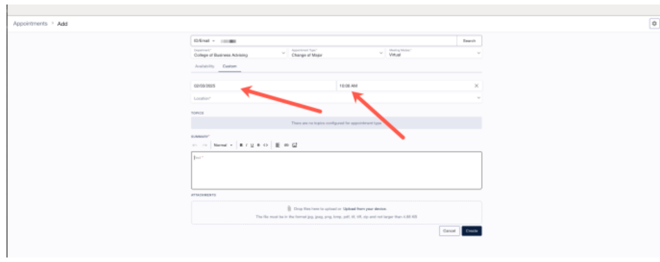




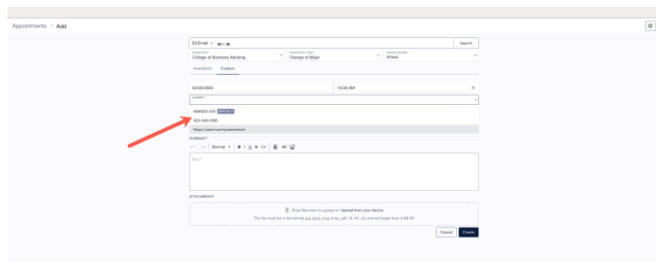


Click on the ***Custom*** tab.

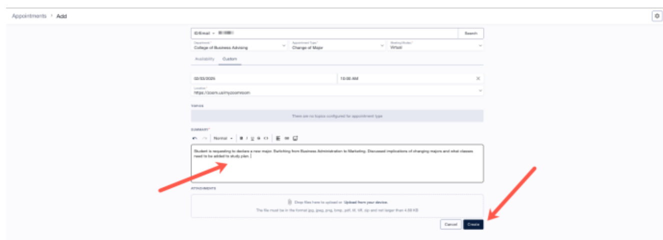
Specify the time and appropriate location where you met with the student.



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

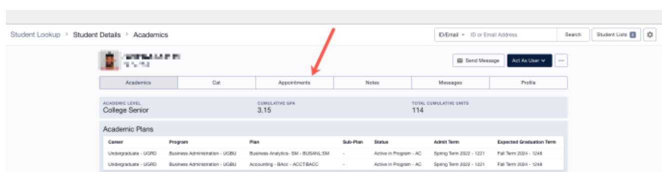


To confirm this ***Appointment Summary Report***, click on the ***Create*** button.



2) the Student Details page

Begin by navigating to the ***Student Details*** page for the student that you are creating a drop-in appointment summary report for.

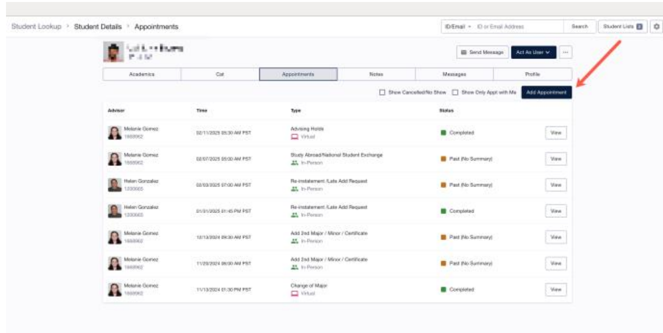


The ***Student Details*** page can be accessed either from your assigned student population on the ***Student Lookup*** page, the query results on the

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

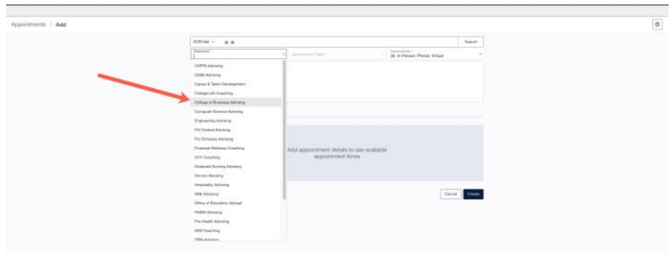
With the ***Student Details*** page open, click on the ***Appointments*** tab. You will now be looking at the Appointments History for this student.

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



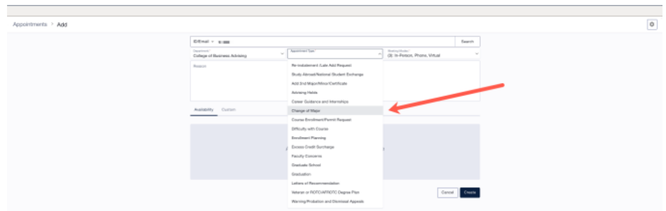
A popup will open with the appointment formulary.

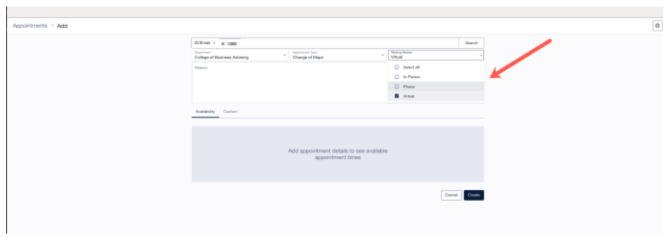
The platform will automatically pull in the student's information and tie it to this appointment.



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

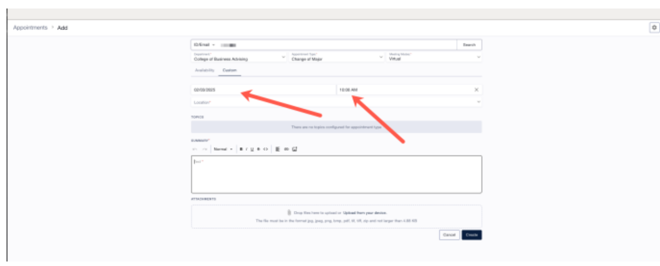
- the ***Department*** that this appointment pertains to from the dropdown menu ont he left
- the ***Appointment Type*** from the dropdown menu in the middle
- the ***Modality*** from the dropdown menu on the right

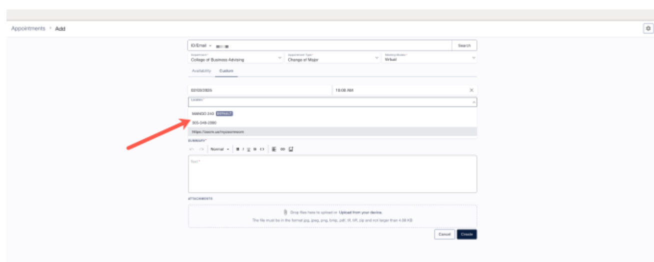




Click on the ***Custom*** tab.

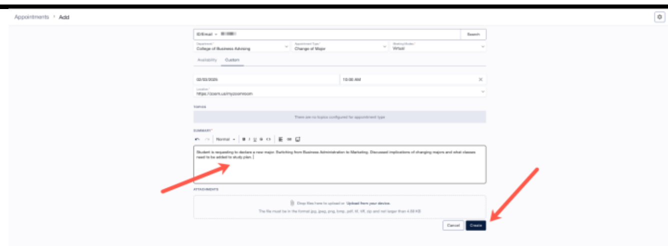
Specify the time and appropriate location where you met with the student.





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.



Marking an Advising Appointment Summary as a No-Show

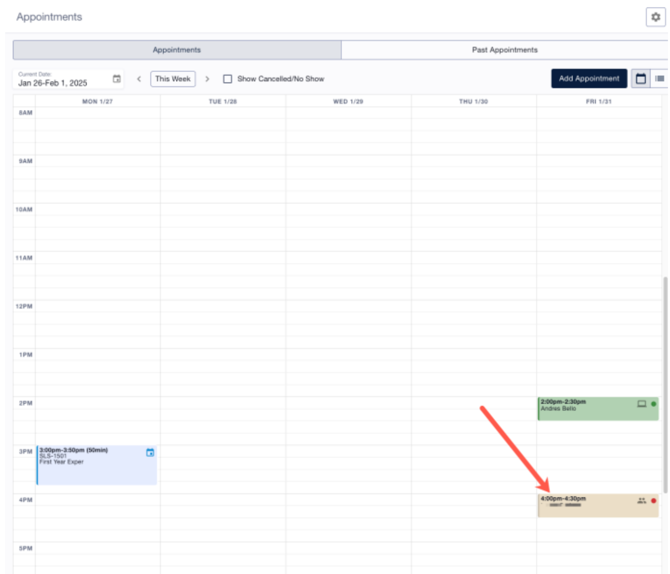
If a student does not attend a previously scheduled advising session, the calendar event can be marked as a ***No-Show.***

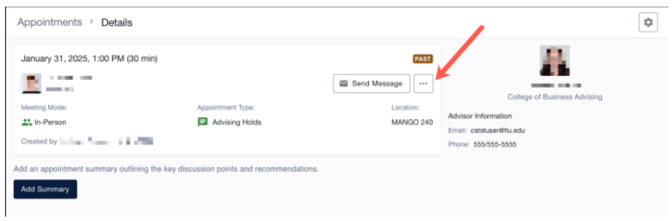
Begin by navigating to your ***Appointments*** page.

Click on the advising session that you wish to mark as a ***No-Show.***

Click on the calendar event.

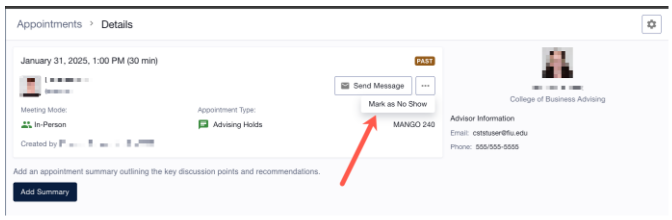
You will be redirected to the ***Appointment Details.***

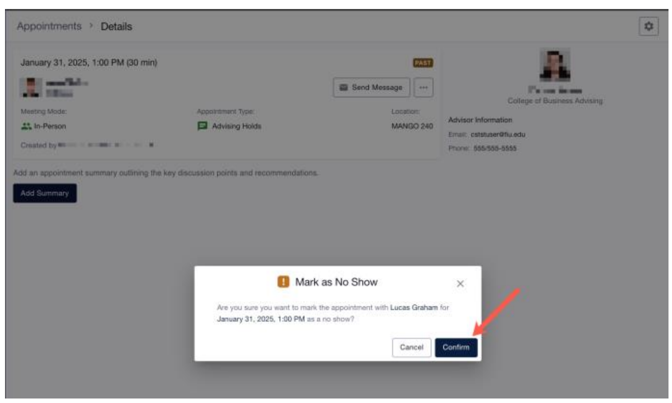


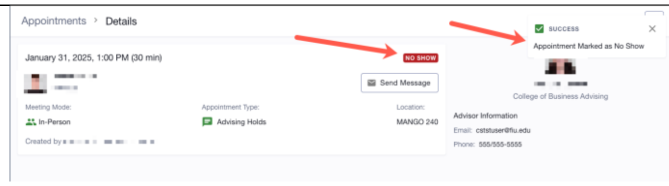


Click on the ... button located to the right of the ***Send Message*** button.

The ***Mark as No Show*** option will appear.







Click on the ***Confirm*** button.

The advising session will immediately reflect as a No Show.

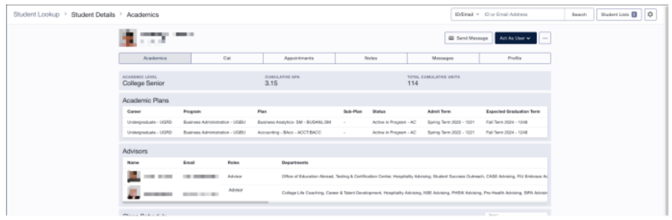
Editing an Advising Appointment Summary Report

Appointment Summary Reports can be edited by advisors.

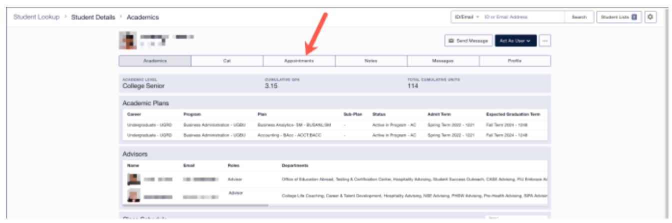
To edit an ***Appointment Summary Report***, begin by navigating to an appointment instance. Appointment instances can be accessed either from

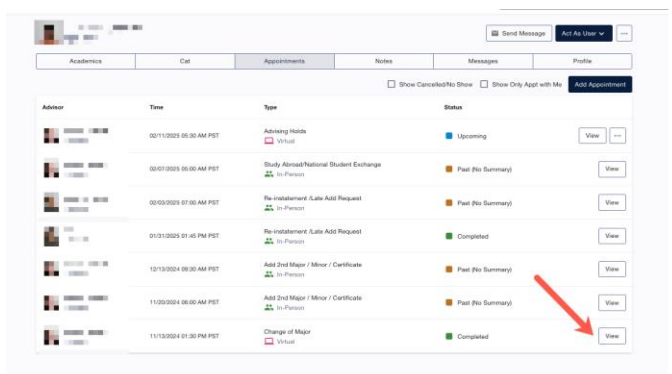
1) the ***Student Details*** page

Begin by navigating to the ***Student Details*** page for the appointment that you wish to edit.



On the ***Student Details*** page, you will find the Appointments tab.

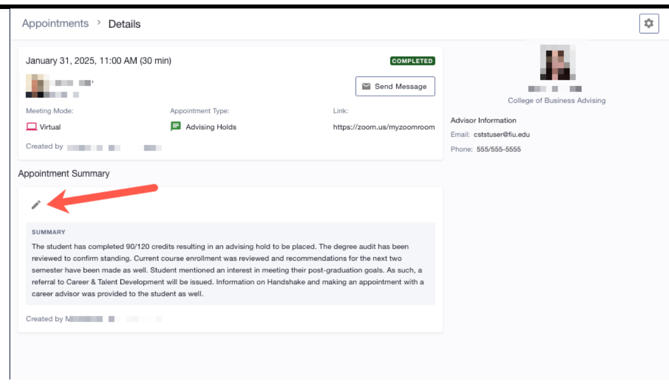


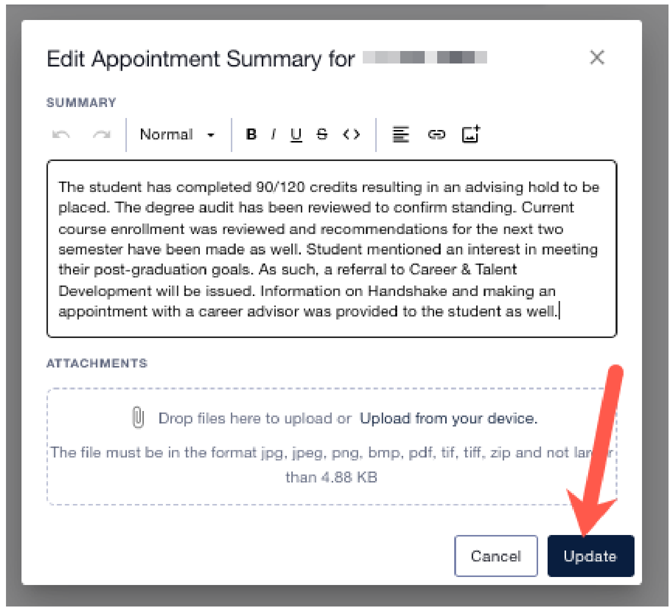


Click on the ***View*** button that pertains to the ***Appointment Summary Report*** you wish to edit.

Make the necessary edits.

Click on the ***Update*** button to confirm these changes.

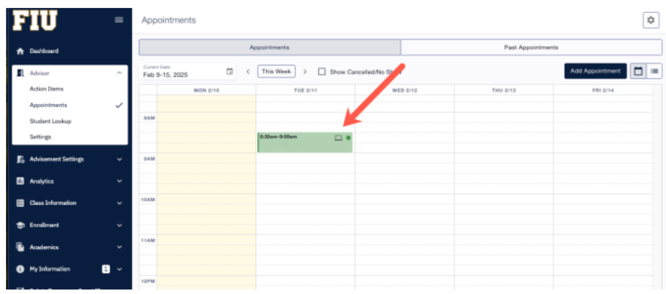




2) your Appointments page

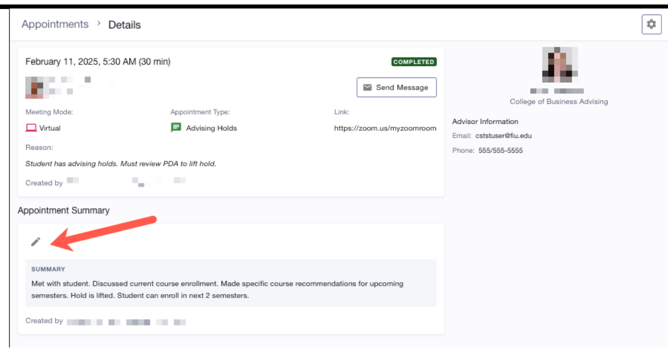
Begin by navigating to your ***Appointments*** page.

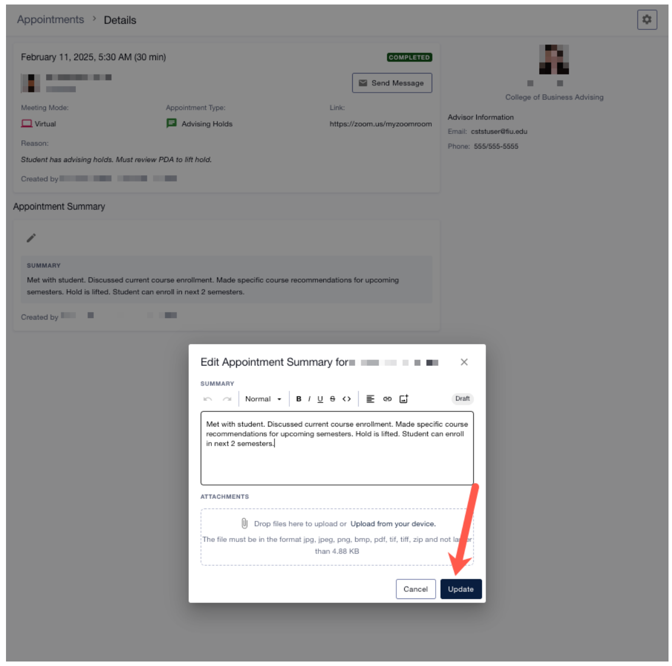
Select the ***Appointment*** whose ***Appointment Summary Report*** you wish to edit.



You will be redirected to the ***Appointment Details***.

Make the necessary edits and click on the ***Update*** button to confirm.





<u>ADVISING NOTES</u>

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 ***Advising Note*** by the university is to provide summary commentary and course recommendations following an Advising & Registration Day session with a student.

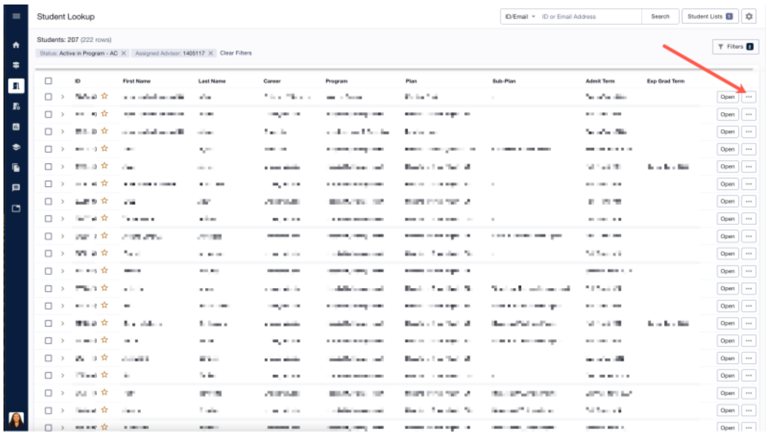
An ***Advising Note*** can be created through various avenues on the platform:

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.

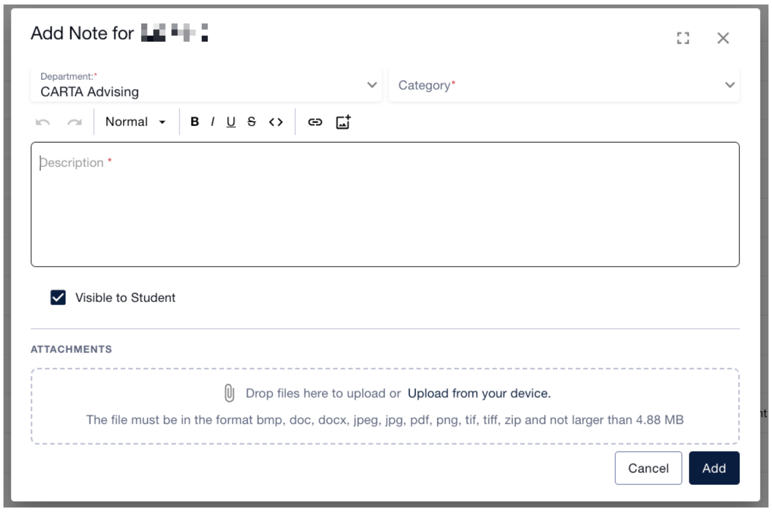
To create an ***Advising Note***, begin by selecting the student(s) that you would like to attach the Note to.

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



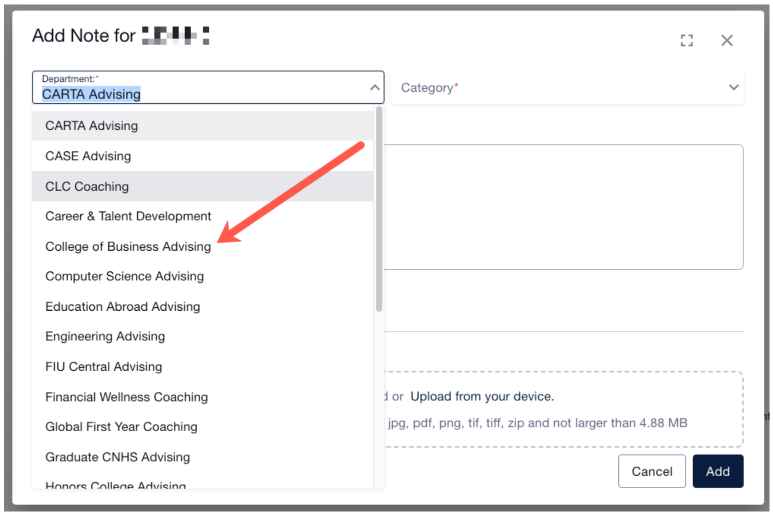
An ***Actions*** menu will open. Click on ***Add Note*** from the options listed.

A popup will appear.



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

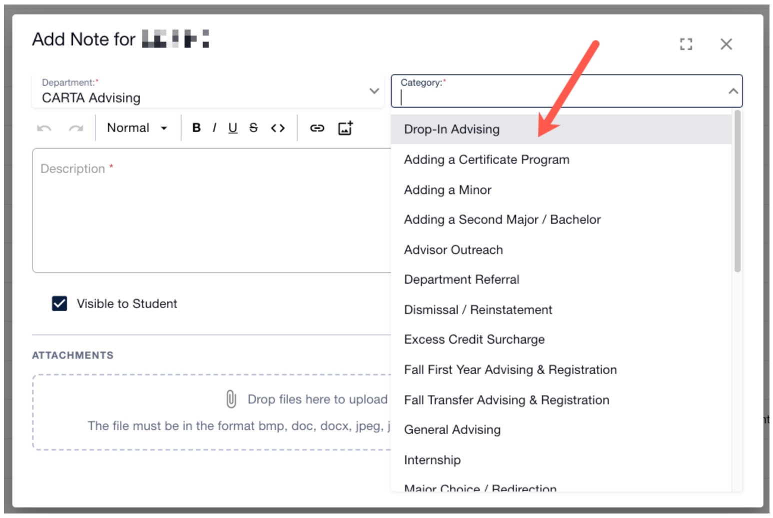
Select the ***Category (Note Reason)*** that applies to the ***Note.***



Compose the comment that will apply to this Note.

If needed, attach any file attachments to the Note.

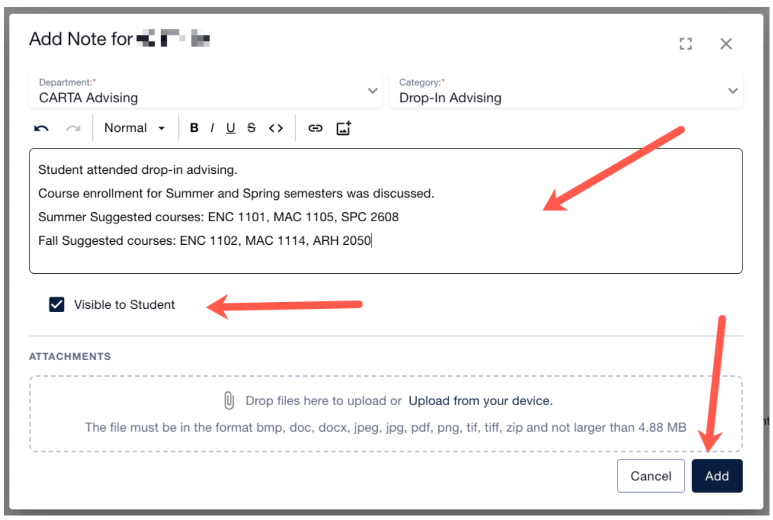
When ready, click on the ***Add*** button.



Note: Notes are by default visible to students when Visible to Student is selected.

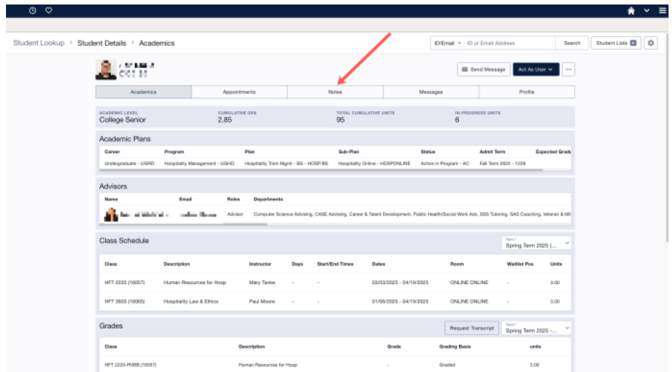
2) The Student Details page

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

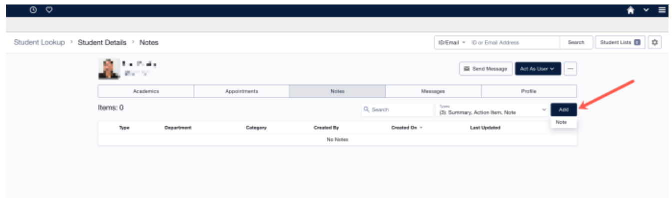


Click on the ***Add*** button located on the right-hand side of the ***Student Details*** page.

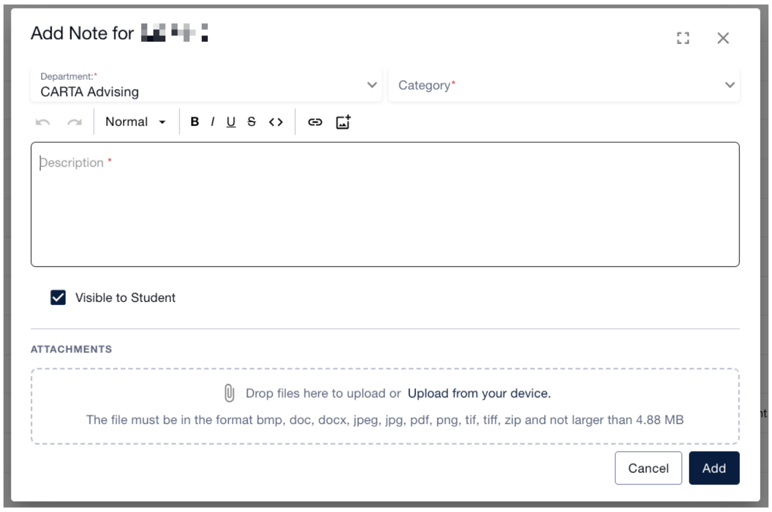
A pop-up will appear.



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



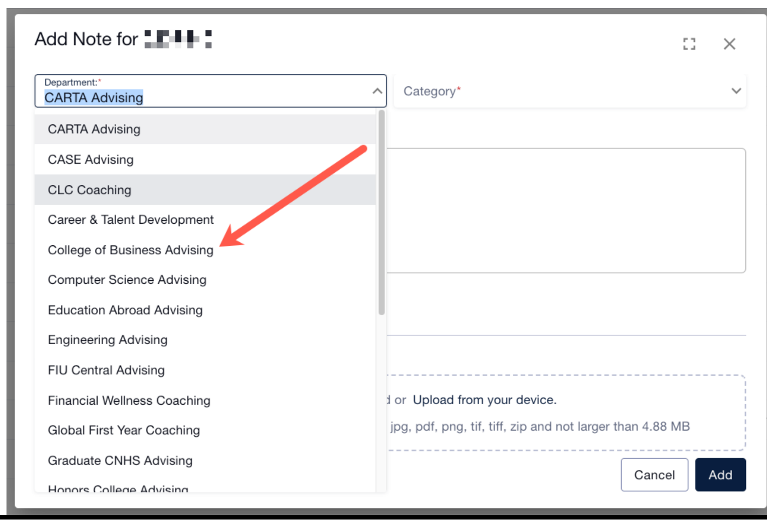
Select the **Category (Note Reason)** that applies to the **Note.**

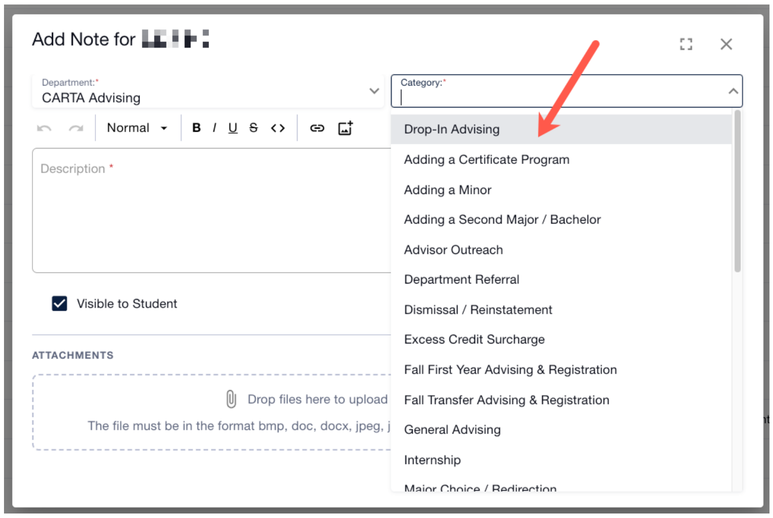


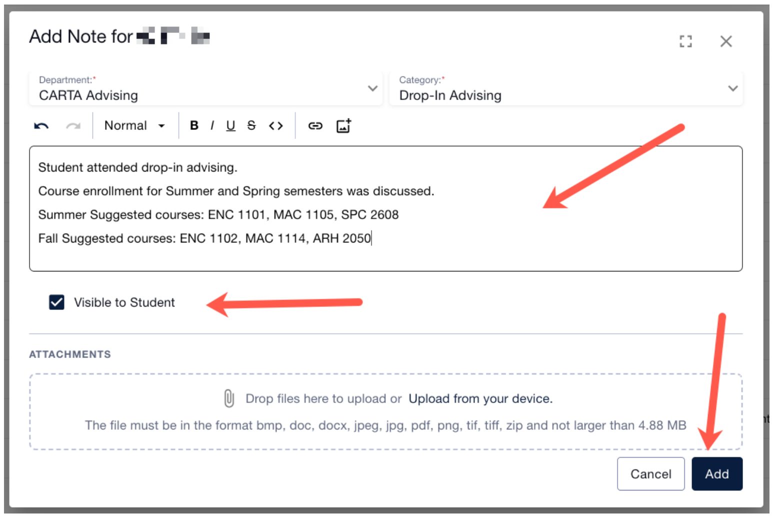
Compose the comment that will apply to this Note.

If needed, attach any file attachments to the Note.

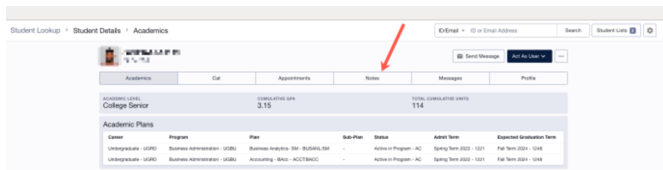
When ready, click on the ***Add*** button.







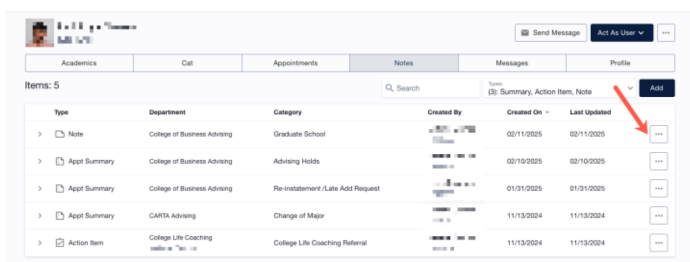
Editing an Advising Note



Begin by navigating to the ***Student Details*** page of the student whose Advising Note you wish to edit.

Click on the ***Notes*** tab.

Click on the  button located to the right of the ***Advising Note*** details.

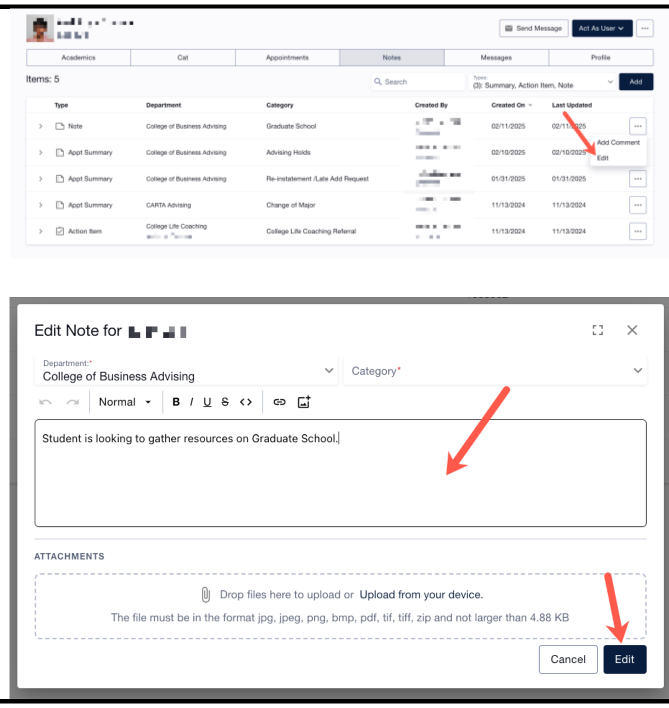


Select the ***Edit*** option.

The ***Advising Note*** popup will appear.

Make all the necessary changes to the Note.

When ready click on the ***Edit*** button to confirm.



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.

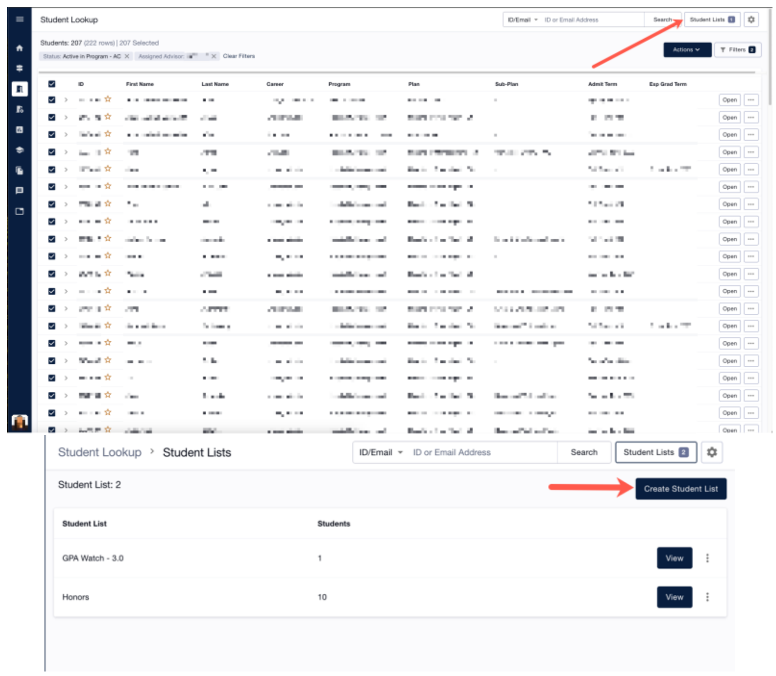
Click on the ***Student Lists*** button.

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

Here you will find your personal ***Student Lists***.

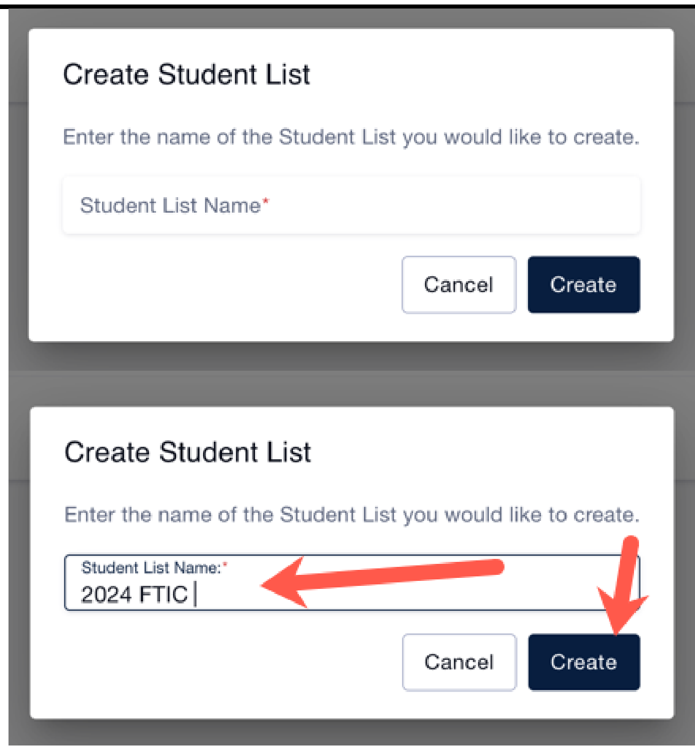
Note: ***Student Lists*** can only be seen by the user that created them.

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



A popup window will appear prompting you to name the new ***Student List.***

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



Adding a Student to a Student List (Watch List)

A student can be added to a ***Student List*** through various avenues on the platform:

1) From the ***Student Lookup*** page

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.

Begin by selecting a student from your assigned student population OR from the results that populate from a query.

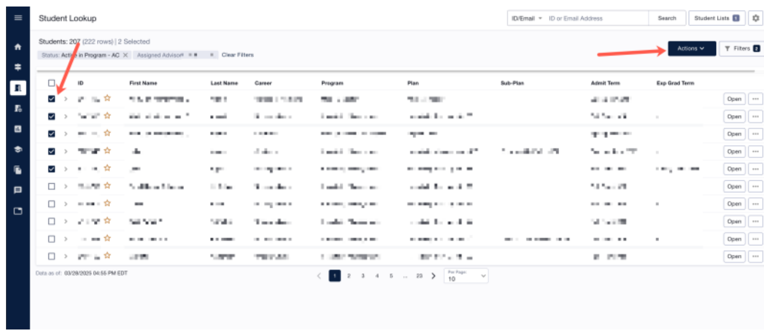
Next, click on the ··· button.

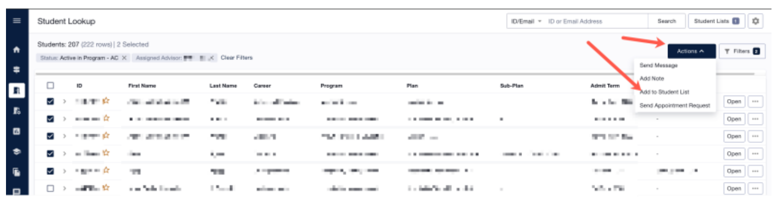
The ***Actions*** menu will open showing a list of functions that can be performed.

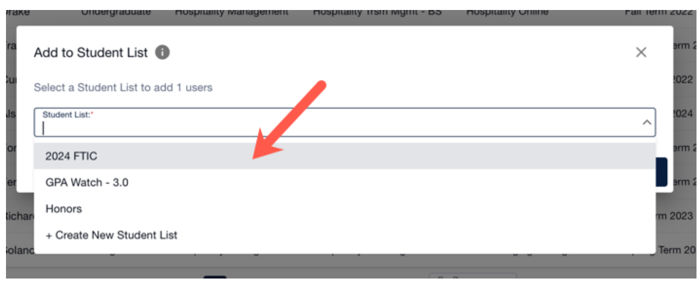
Click on the ***Add to Student List*** option.

A popup will appear. You will see that any previously created Student Lists will appear in the dropdown menu.

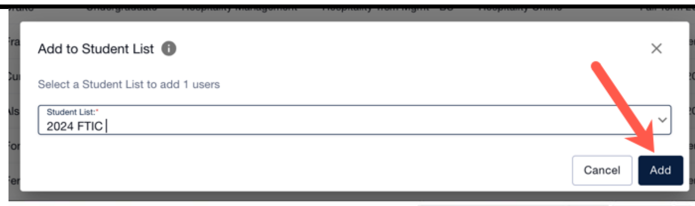
Select the ***Student List*** you wish to attach to this student.







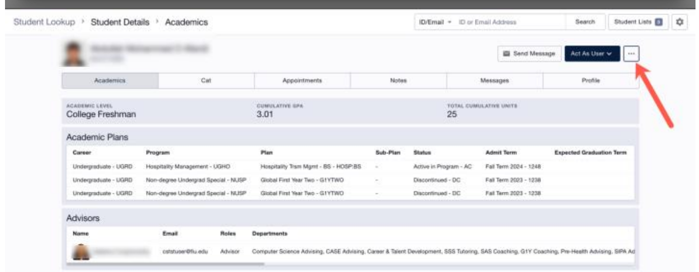
When ready, click on the ***Add*** button.



2) From the Student Details page

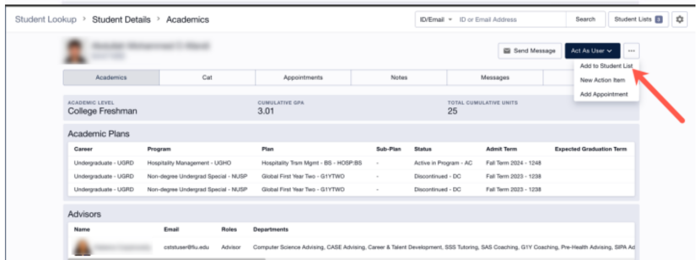
Begin by navigating to a ***Student Details*** page.

Next, click on the ··· button located in the top righthand corner of the page.

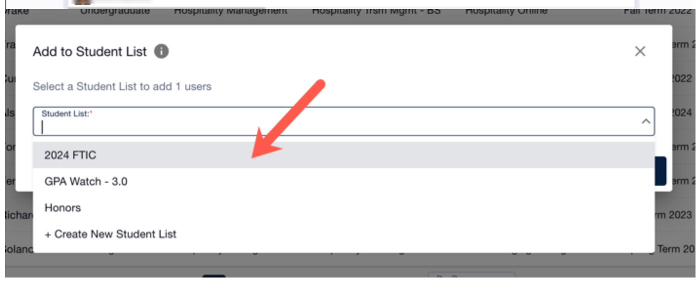


The ***Actions*** menu will open showing a list of functions that can be performed.

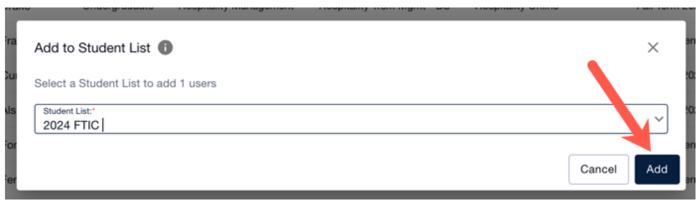
Click on the ***Add to Student List*** option.



A popup will appear. You will see that any previously created Student Lists will appear in the dropdown menu.



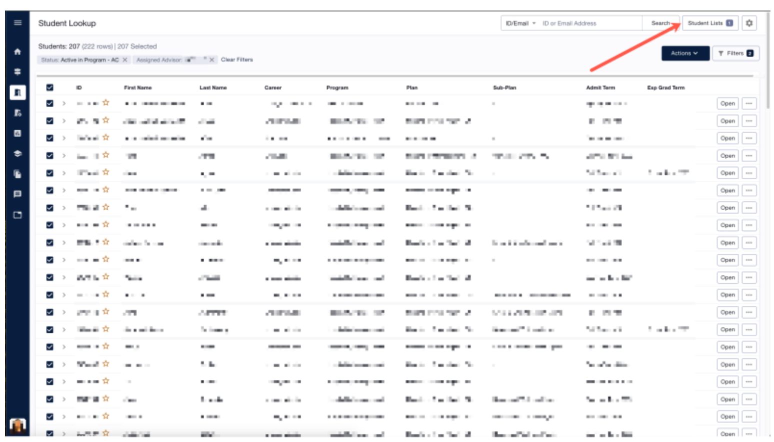
Select the ***Student List*** you wish to attach to this student.



When ready, click on the ***Add*** button.

3) From inside the Student List itself

Begin by navigating to the ***Student List*** page. Click on the Student List button located at the top righthand corner of your platform page. This button will be located on your Student Lookup or Student Details pages.



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

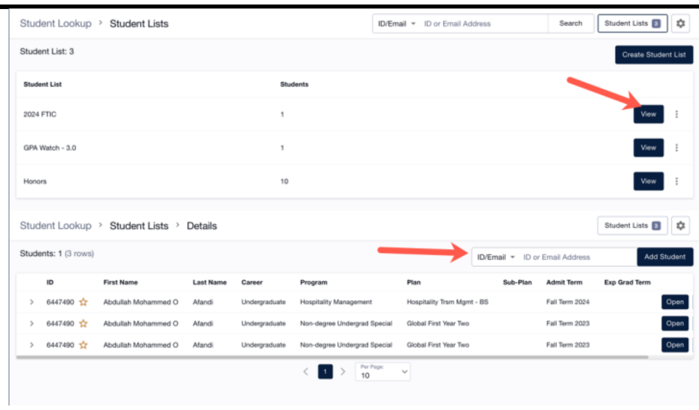
You will find all of your personal **Student Lists** here.

Click on the ***View*** button located to the right of the ***Student List*** you wish to add a student.

You will be redirected to the particular ***Student List*** you selected.

In the ***Search*** box, enter the student's name, Panther ID or email.

Click ***Add Student.***



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.

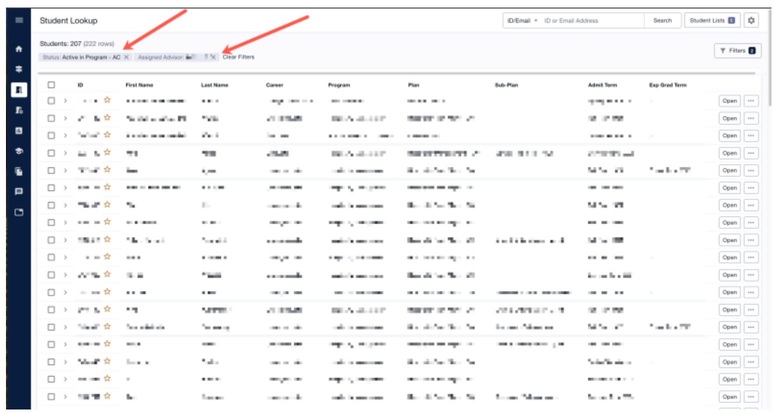
To perform a query, begin by clearing your assigned population by X-ing out the two filters automatically applied at the top of your ***Student Lookup*** page.

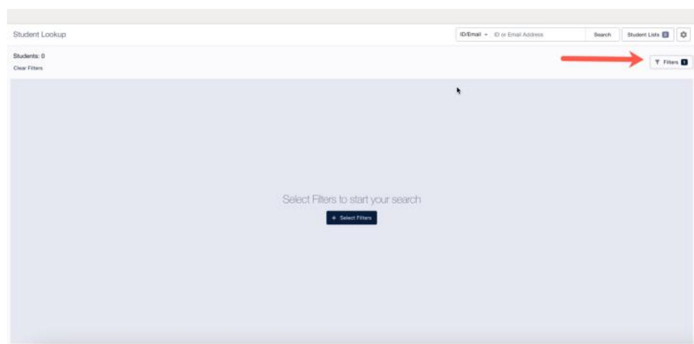
The population on this page will automatically refresh to show 0 students.

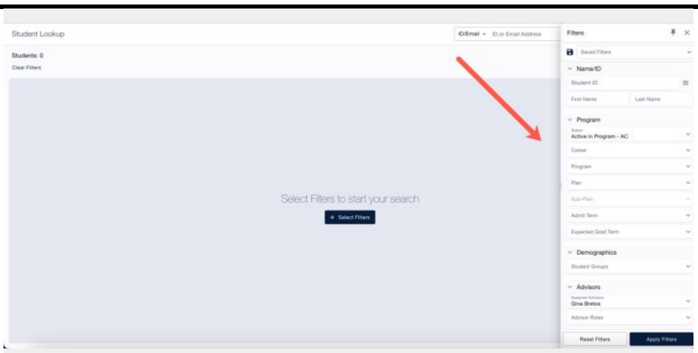
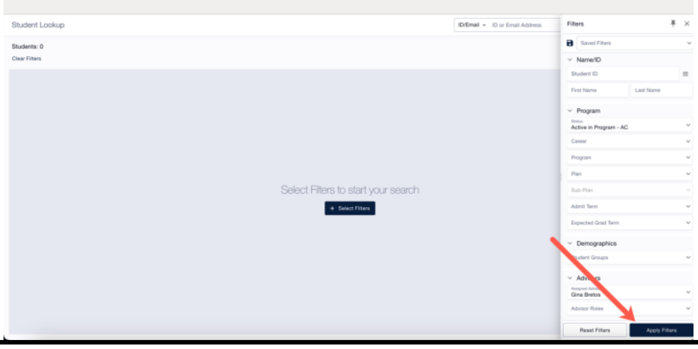
To view the available filters, click on the ***Filters*** button located on the right-hand side of the Student Lookup page.

Filters are categorized into subgroupings

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





To identify the population of interest, select the appropriate filters as needed.	
When ready, click on the ***Apply Filters*** button for processing.	

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