



Filter for and Reach Out to Students Based on Their Degree Plans

Use filters to identify students based on their plan status and progress, such as those who are awaiting plan approval or who do not yet have any plans.

1. In the **My Students** tab, ensure that the Connection is set to **Primary Advisor** and the Term is **Active**.
2. Click on the **Add Filters** button on the right side of the screen.

3. In the new window that appears, select the **Degree Plans** tab.
4. Select **Filter students using Degree Plans** and the criteria* by which to filter your students: the presence/absence of a plan, a plan's status, and/or the percentage of completed credits. Click **Submit**.

*IMPORTANT NOTES ABOUT FILTERING:

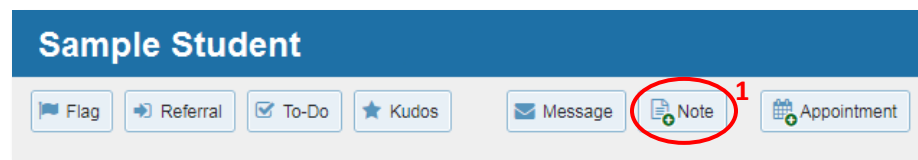
If a student has more than one plan, the results will include students who have *at least one plan* that meets the search criteria.

Status definitions:

- Approved – Plan has been approved with or without an expiration term
- Approval Requested – Plan has been modified by the student and is awaiting feedback
- Returned – Plan needs to be changed per the academic advisor and/or as a result of being off-track
- In Progress – Plan has been drafted but not yet approved, returned, nor awaiting approval
- Expired – Plan was previously approved but has reached the end of its expiration term

After filtering for advisees who meet the selected Degree Planner criteria, academic advisors may reach out to those students in a targeted manner. Depending on the purpose/goal of the outreach, it may be appropriate to contact students one-by-one or in groups (e.g., everyone with an expired plan).

Option 1: Reach Out to and Document for One Student at a Time

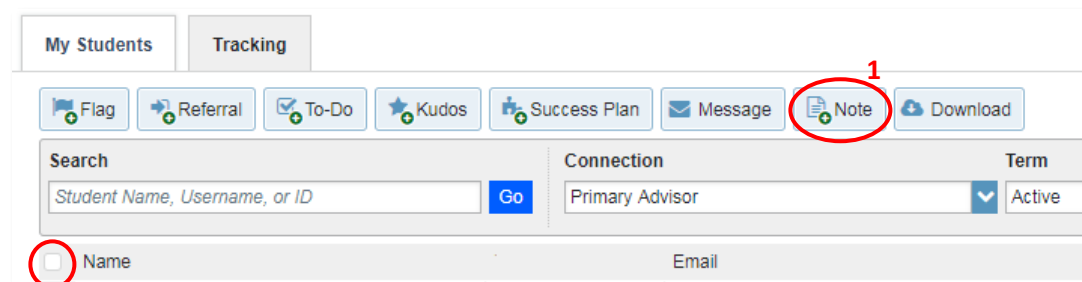


1. While in a student's SSN folder, click on the **Note** button.
2. Select **Advising Note** from the Note Type drop-down menu.
3. Write a **Subject** and **Note** just like you were writing a personalized email to the student.
4. Check the box next to **Send copy of note to student**.
5. Ensure that the **Shared** radio button is selected.
6. Click **Submit**.

The 'Create Note' form includes the following elements:

- Buttons: 'Never Mind' and 'Submit'.
- Fields: 'Note Type' (dropdown menu with 'Advising Note' selected), 'Date' (calendar icon, '10-12-2018'), 'Subject' (text input), and 'Note' (large text area). A red '3' has arrows pointing to the 'Subject' and 'Note' fields.
- Options: 'Send copy of note to yourself' (checkbox, unchecked), 'Send copy of note to student' (checkbox, checked, with a red '4' next to it).
- Text: '21 recipients selected' with a red arrow pointing to it and the text 'Only appears with option 2'.
- Options: 'Note Sharing' (radio buttons for 'Shared' and 'Private', with 'Shared' selected and a red '5' next to it).
- Text: 'FERPA Notice: This note is disclosable to the student under FERPA'.
- Text: 'Note Permissions: People with the following roles may be able to see this note if they have a relationship with the student(s):' followed by a list of roles: Academic Leadership, Academic Support, Athletic Coach, Back on Track Mentor, and Primary Advisor.
- Buttons: 'Never Mind' and 'Submit' (circled in red with a red '6' next to it).
- Text: '* Required fields'.

Option 2: Reach Out to and Document for Many Students at Once



1. While in your filtered roster, check the **boxes** next to each student you want to contact and click on the **Note** button at the top of the screen.
 - NOTE: Checking the box next to the Name column header will select all students on your entire roster (i.e., across multiple pages, if applicable).
2. Select **Advising Note** from the Note Type drop-down menu.
3. Write a **Subject** and **Note** just like you were sending a mass email to your advisees.
4. Check the box next to **Send copy of note to student**.
5. Ensure that the **Shared** radio button is selected.
6. Click **Submit**.