Caseload Management Features

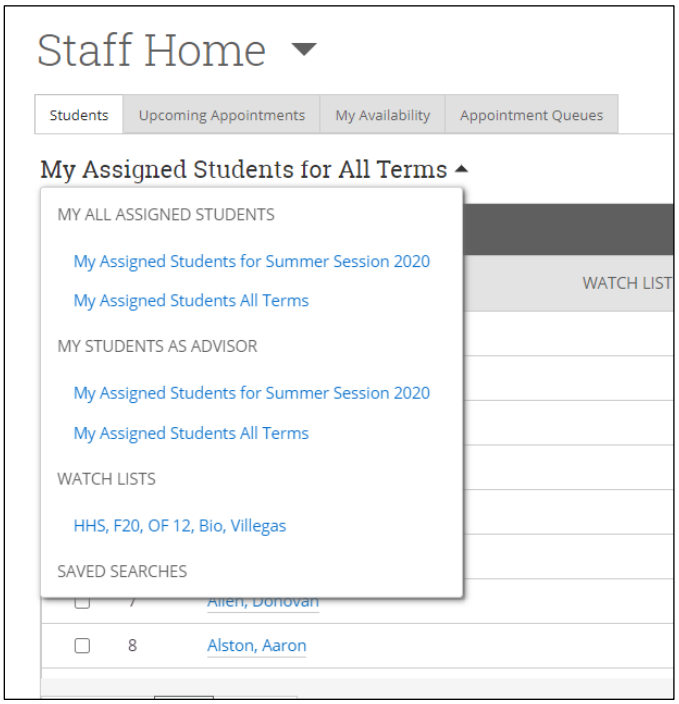
Date: 12/3/20

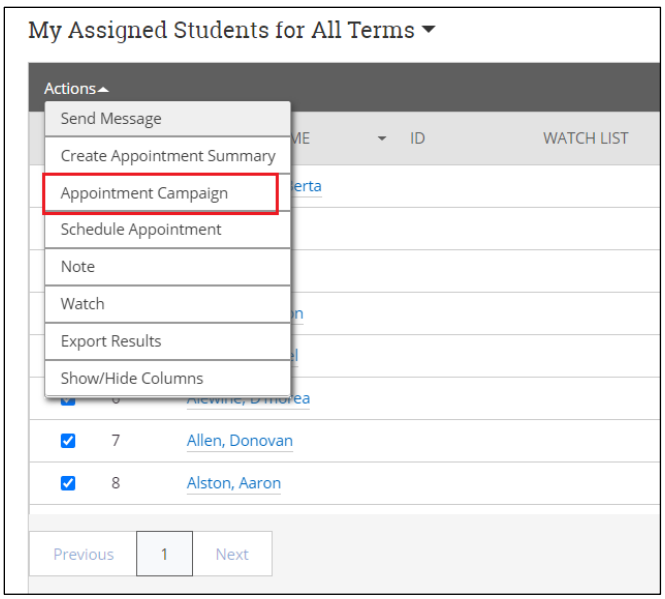
OVERVIEW
Advisors will have drop-down options to view their Student Lists and/or assigned student caseload list.

Advisor View

Advisor can select students from caseload list, such as:

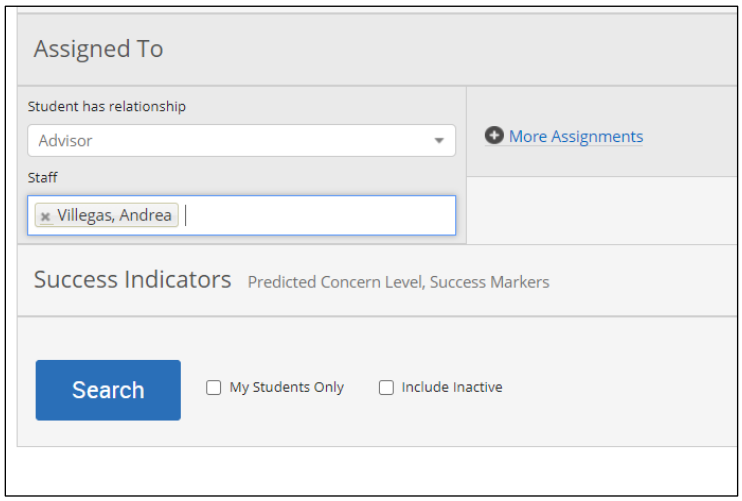
- Immediately create an appointment campaign
- Export students into excel
- Send a message





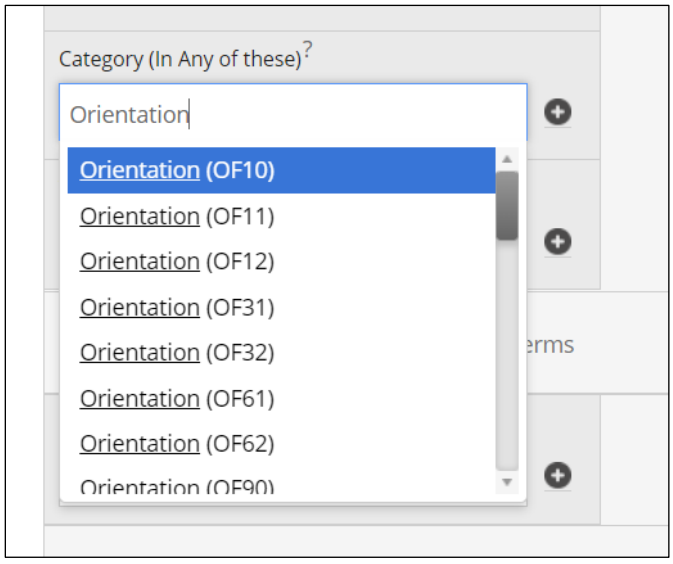
Advanced Search

Advisors can conduct an "Advanced Search" of their caseload to focus on a specific student population.



Combining Caseload filter and Orientation code

- Advisor can locate students in their caseload that have signed-up for a specific Orientation date. (This is applicable when orientation codes are in use for a specific Term)
- Advisor can then create a campaign for their incoming students to conduct a New Student Registration/Advising Appointment

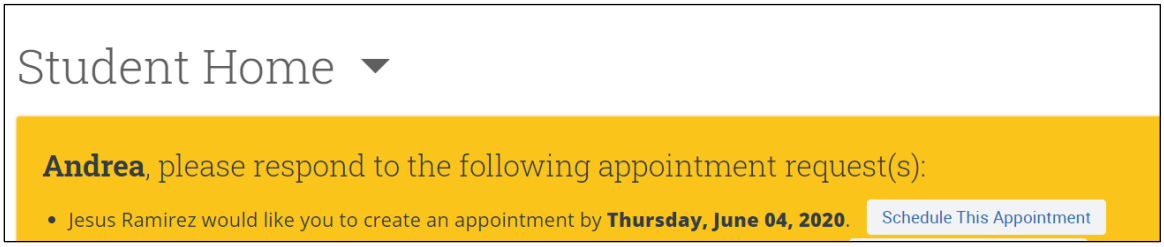


Student View

Advising Appointment Campaign

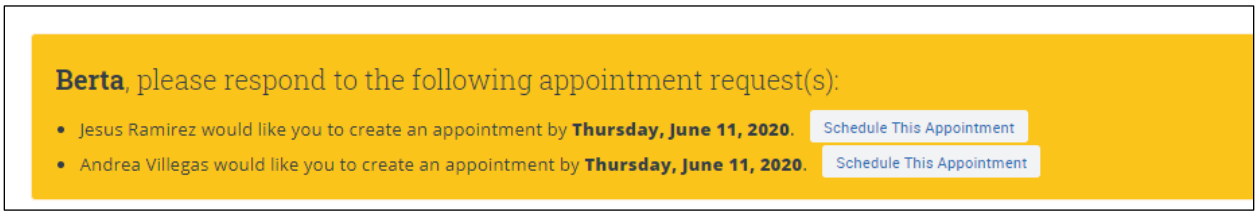
When a student is invited as part of an Advising Appointment Campaign, their Student Home page will have a yellow banner prompting them to click “Schedule this appointment”.

- The appointment deadline in the yellow banner is generated from your Campaign date range.
- Your student will only see advising appointment slots within your campaign dates/times. These correspond with the Campaign open availabilities which are setup up by individual Advisors.



For students with more than one assigned advisor in EAB, such as EOP and Honors students.

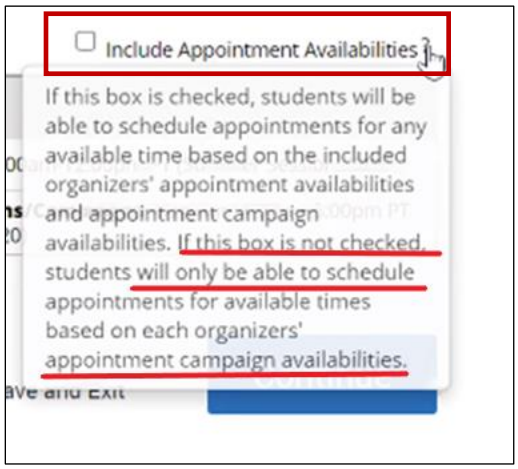
- The banner will display multiple advisor requests when the student is part of multiple active campaigns



Advisor Note

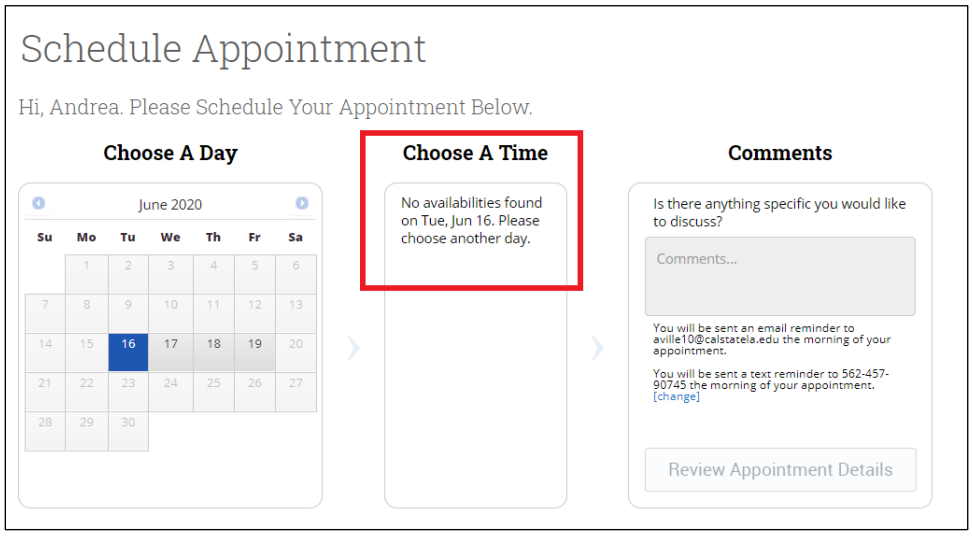
When the campaign organizer (i.e. Advisor/Center Manager) creates a campaign, the following box must be left unchecked, in order to restrict student visibility to only include campaign appointment availability.

Note: If the box is checked, the student will be able to see all advisor availability

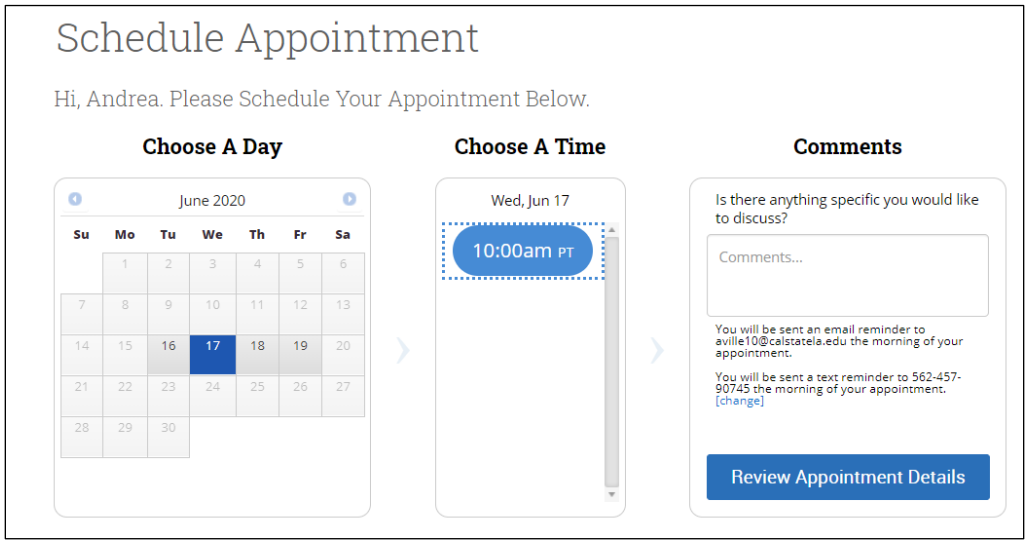


Student Selects appointment day & time:

If appointment times are filled for a specific date, it will prompt the student to select another date/time in your campaign.



Student finds and selects an available appointment time/date:



Student Confirms Scheduled Appointment

- Student will be sent appointment reminders via email & text message.
- Student will see your zoom link in the appointment details and reminders (applicable when zoom links are in use).

