

Caseload Management Features

Date: 12/3/20

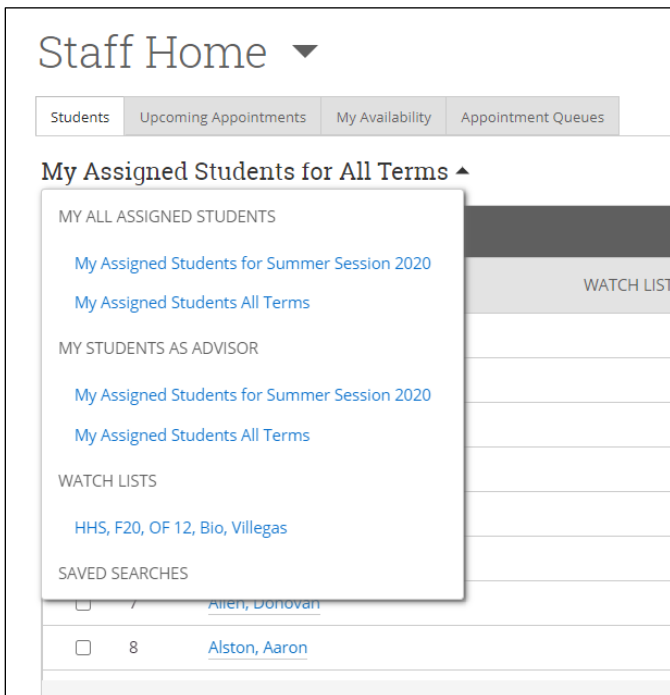
OVERVIEW

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



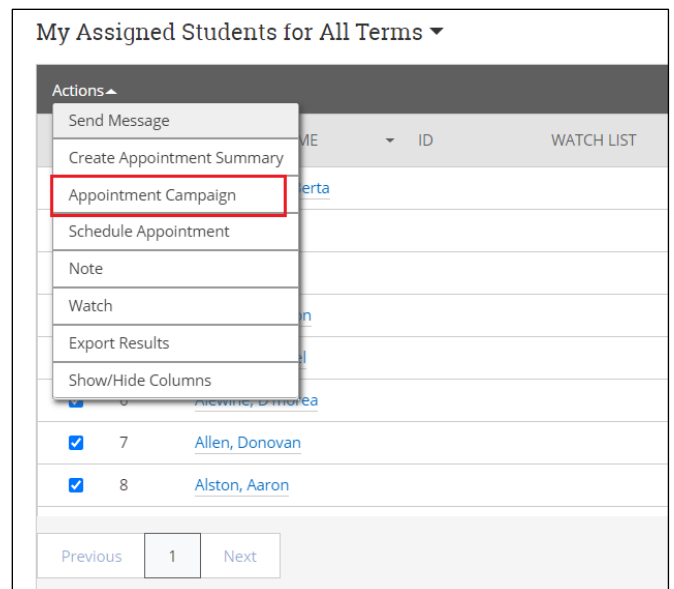
Staff Home ▾

Students | Upcoming Appointments | My Availability | Appointment Queues

My Assigned Students for All Terms ▲

- MY ALL ASSIGNED STUDENTS
 - [My Assigned Students for Summer Session 2020](#)
 - [My Assigned Students All Terms](#)
- MY STUDENTS AS ADVISOR
 - [My Assigned Students for Summer Session 2020](#)
 - [My Assigned Students All Terms](#)
- WATCH LISTS
 - [HHS, F20, OF 12, Bio, Villegas](#)
- SAVED SEARCHES

<input type="checkbox"/>	7	Allen, Donovan
<input type="checkbox"/>	8	Alston, Aaron



My Assigned Students for All Terms ▾

Actions ▾

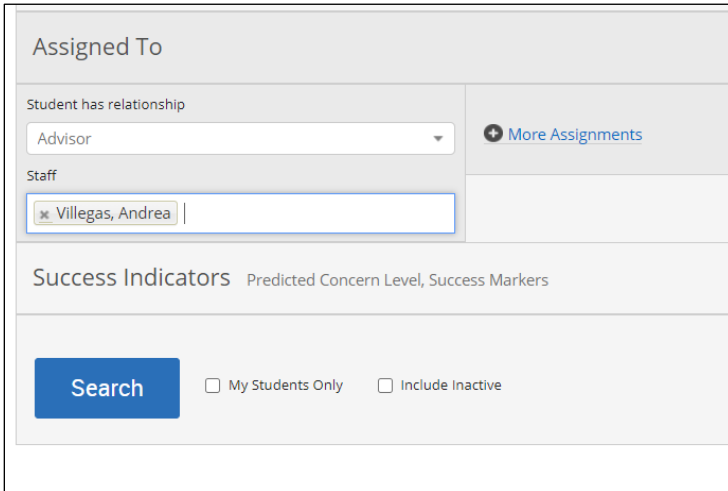
- Send Message
- Create Appointment Summary
- Appointment Campaign**
- Schedule Appointment
- Note
- Watch
- Export Results
- Show/Hide Columns

	ME	ID	WATCH LIST
<input checked="" type="checkbox"/>	7	Allen, Donovan	
<input checked="" type="checkbox"/>	8	Alston, Aaron	

Previous | 1 | Next

Advanced Search

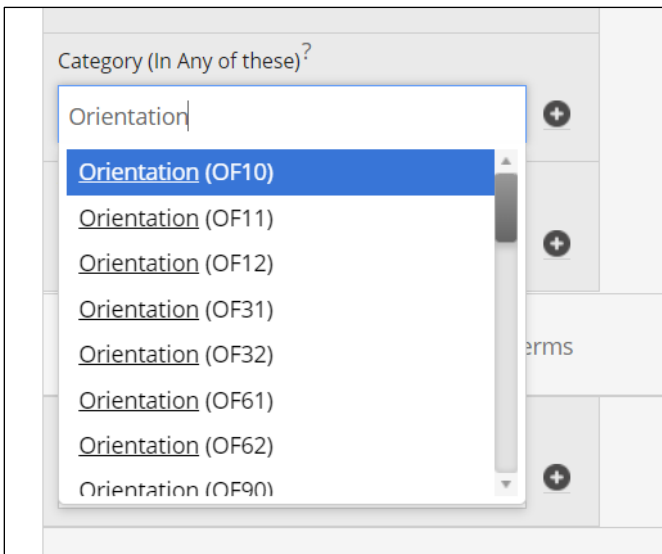
Advisors can conduct an “Advanced Search” of their caseload to focus on a specific student population.



The screenshot shows the 'Assigned To' section of the search interface. It includes a 'Student has relationship' dropdown menu set to 'Advisor', a 'Staff' search box containing 'Villegas, Andrea', and a 'Success Indicators' section with options for 'Predicted Concern Level' and 'Success Markers'. A blue 'Search' button is located at the bottom left, and there are checkboxes for 'My Students Only' and 'Include Inactive' at the bottom right.

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



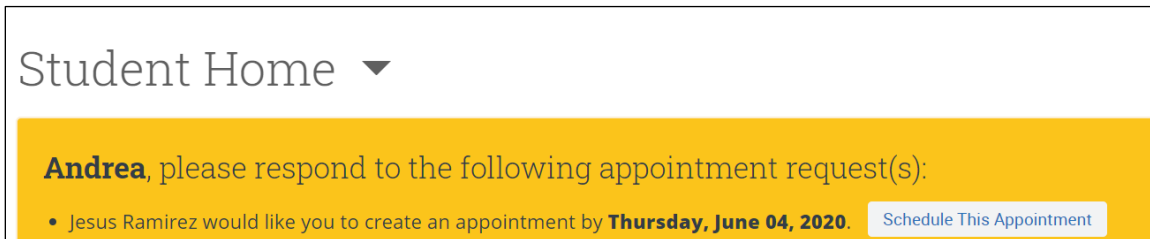
The screenshot shows a dropdown menu titled 'Category (In Any of these)?'. The search input contains 'Orientation'. The dropdown list includes the following items: 'Orientation (OF10)', 'Orientation (OF11)', 'Orientation (OF12)', 'Orientation (OF31)', 'Orientation (OF32)', 'Orientation (OF61)', 'Orientation (OF62)', and 'Orientation (OF90)'. The 'Orientation (OF10)' item is highlighted in blue. There are plus signs to the right of the dropdown list.

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.



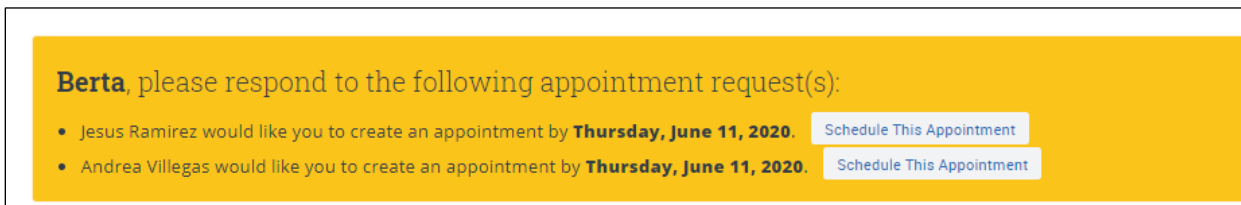
Student Home ▼

Andrea, please respond to the following appointment request(s):

- Jesus Ramirez would like you to create an appointment by **Thursday, June 04, 2020**. [Schedule This Appointment](#)

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



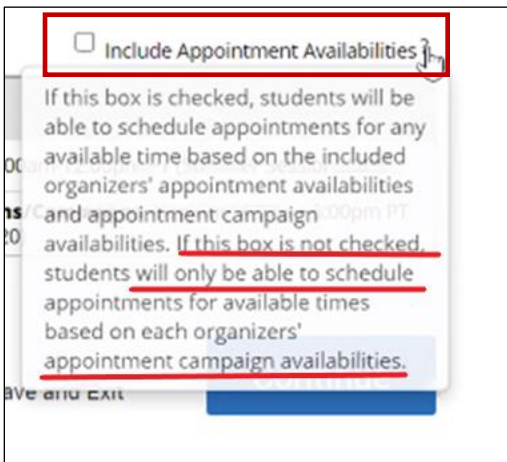
Berta, please respond to the following appointment request(s):

- Jesus Ramirez would like you to create an appointment by **Thursday, June 11, 2020**. [Schedule This Appointment](#)
- Andrea Villegas would like you to create an appointment by **Thursday, June 11, 2020**. [Schedule This Appointment](#)

Advisor Note

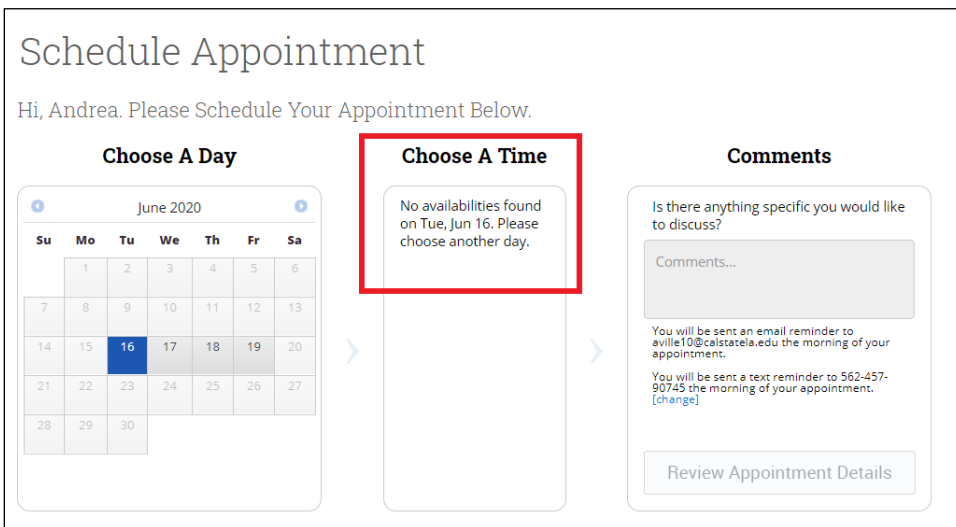
When the campaign organizer (i.e. Advisor/Center Manager) creates a campaign, the following box must be left unchecked, in order to restrict student visibility to only include campaign appointment availability.

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:

Schedule Appointment

Hi, Andrea. Please Schedule Your Appointment Below.

Choose A Day

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Choose A Time

Wed, Jun 17

10:00am PT

Comments

Is there anything specific you would like to discuss?

Comments...

You will be sent an email reminder to aville10@calstatela.edu the morning of your appointment.

You will be sent a text reminder to 562-457-90745 the morning of your appointment. [\[change\]](#)

[Review Appointment Details](#)

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).

Congratulations Andrea! Your appointment has been scheduled.

Appointment Details

Who: Andrea Villegas with Andrea Villegas

Why: General Advising

When: Wednesday, June 17
10:00am - 11:30am PT

Where:
College of Health and Human Services Advising Center

Additional Details:

Please click the zoom link for your group online New Student Registration Lab appointment.

<https://calstatela.zoom.us/j/3740499716>

Reminders: Email at aville10@calstatela.edu
Text at 562-457-90745