CardSmart Access and Training

CardSmart is an enterprise-level technology platform that links administrators, advisors, deans, faculty, other staff, and students in a coordinated care network designed to help schools proactively manage student success and deliver a return on education.

Access

In order to get access to CardSmart, please complete the following steps:

1. Complete the FERPA Quiz and Statement of Responsibility on Blackboard:

   Instructions can be found here: http://louisville.edu/enrollmentmanagement/peoplesoft-security-access

2. Complete the PeopleSoft Security Account Request Form:

   http://louisville.edu/it/departments/enterprise-security/forms/peoplesoft-cs-request

   Under "Permissions Requested" select "Academic Advising" then "EAB SSC Access"

Once the form is completed, the user will be able to access CardSmart in 1-2 business days. Users will use their same UofL single sign-on information.

The login URL for CardSmart is: louisville.campus.eab.com

Training

For Academic Advisors

Contact the CardSmart Power User in your unit:

Unit	Advisor	Email
A&S	Megan Clifton	Melark01@louisville.edu
A&S	Kourtney Hall	Kmdavi09@louisville.edu
Business	Katie Etheridge	Klethe01@louisville.edu
Dental Hygiene	Tana Didelot	Trgahl01@louisville.edu
Education	N/A	
Exploratory	Jessica Newton	Jrnewt05@louisville.edu
Honors	Kirsten Armstrong	Kaschm01@louisville.edu
Music	N/A	
Nursing	Andre Brewer	Arbrew03@louisville.edu
Public Health	Rachel Quick	R0mill05@louisville.edu
Social Work	Laurie O'Hare	Laohar01@louisville.edu
Speed	Natalie Oliner	N0olin01@louisville.edu

For faculty and staff members (non-academic advisors):

Contact Khotso Libe to arrange a 1.5 hour training session – ktlibe01@louisville.edu

I.   **Home page**
- A. Assigned Students
- B. Recent Advising Appointments (90 days)
- C. Upcoming Appointments
- D. Availability (set appointment and campaign availability)
- E. Quick Search

II.   **Student Profile (have student examples ready)**
- A. <u>Overview tab</u>
  1. Major History
  2. Advisors and Categories pulled from PeopleSoft
  3. Categories include: some Student Groups, Academic Standing, and Holds
  4. Tags can be created with a list that may not be captured in PeopleSoft; just need a list of Student IDs. E.g., MetroCollege.
- B. <u>Success Progress Tab</u>
  1. Predicted Influencers – factors impacting the risk level
  2. Success Markers – courses identified by faculty as "gateway courses"
- C. <u>Reports/Notes Tab</u>
  1. Notes can be hidden from students and can be used for document storage. Some users store petition information, exceptions approved by department, or sensitive information. [The "send message" feature communicates to the student and also stores the communication in the conversations tab.]
  2. **Advisor Reports** are made at the end of each appointment and document the time spent with a student.
     - a. **All reports should be objective and informative. Refrain from any personal sentiments about the student. Think about what is important for another advisor to know if they were to meet with the student next. If student resources or support office recommendations were made, include that information in the report. If particular classes or requirements were recommended, always include them.**
- D. <u>Class Info Tab</u>
  1. CardSmart version of the transcript
  2. Test scores at the bottom
- E. <u>Appointment Tab</u> – Upcoming appts, recent appts, and No-shows for the term.
- F. <u>Conversations Tab</u>
  1. Any communication made with the student from CardSmart is captured here. New appointment notifications, appointment reminders, campaign invites, etc. Some advisors primarily communicate through CardSmart to keep a digital trail of communication.
- G. <u>Staff Alerts</u> – Go over the "quick links"

III.   **Schedule an appointment**
- A. From "Staff Alerts", schedule an individual appointment
- B. Show how to <u>unlock unavailable times</u> and <u>times with conflict</u>

IV.   **Advanced Search**
- A. Go through the major headings (actually conduct a search)
- B. Export results
- C. Saved Search & Watch List
- D. Start an appointment Campaign from advanced search

V.   **Appointment Campaign**
- A. Go through the process

VI.   **Time permits** – Reminders, Major Explorer, Calendar, Progress Reports, etc.