University of Louisville

CardSmart Guide

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Introduction

CardSmart, formerly GradesFirst, is the University of Louisville's name for SSC-Campus, a product of the Education Advisory Board's (EAB) Student Success Collaborative (SSC). This program is a Student Success Management System (SSMS) designed to link advisors, faculty, and other staff to students. It allows advisors to proactively manage their advisee caseloads and advising centers to manage their appointments.

Logging In

While learning to navigate CardSmart, you may use the **training site**, using your U of L user ID and password at the following link:

https://louisville-training.gradesfirst.com

To access the **live site**, log in at the following link (bookmark this for regular use):

https://louisville.campus.eab.com/

EAB | Campus
Student Success Collaborative™

User Name:

Password:

Log in to Campus

or

Return to Kiosk Mode

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Browser: Firefox 56 on Windows.

For support, please contact SSCCampusTechSupport@eab.com

Advisor Home

When you first log in, you will see your **Advisor Home** page. From here you can access:

A. Various CardSmart features using the red toolbar to the left,
B. Your **assigned students** (by currently enrolled or all assigned), **upcoming appointments**, **set appointment availability**, and **advising queue**,
C. **Quick search** for CardSmart profiles,
D. **Quick links** to schedule events, the download center for reports you have run, and appointment campaigns,
E. View your upcoming **Reminders** you have set for students,
F. A quick view of your soonest **upcoming appointments**, and
G. Your **recent advising appointment reports** created.

See the screenshot below for a labelled overview of these components:

Toolbar

The red toolbar of icons to the left of each CardSmart page link to the following features:

- Advisor Home,
- Conversations,
- Calendar,
- Cases,
- Campaigns,
- Reminders,
- Advanced Search,
- Lists & Searches,
- Institution Reports,
- Reporting,
- Administration.

These will each be explained separately further along in the manual.
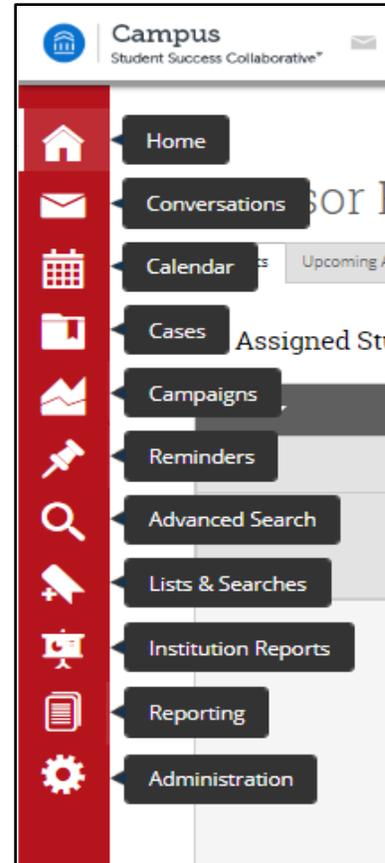
Assigned Students

The assigned students section defaults to display your assigned students that are enrolled for the current semester. You can change this to display all of your assigned students (currently enrolled or not), by clicking the drop down box and then selecting "My Assigned Students All Terms". This drop down also allows you to view your Watch Lists and Saved Searches.
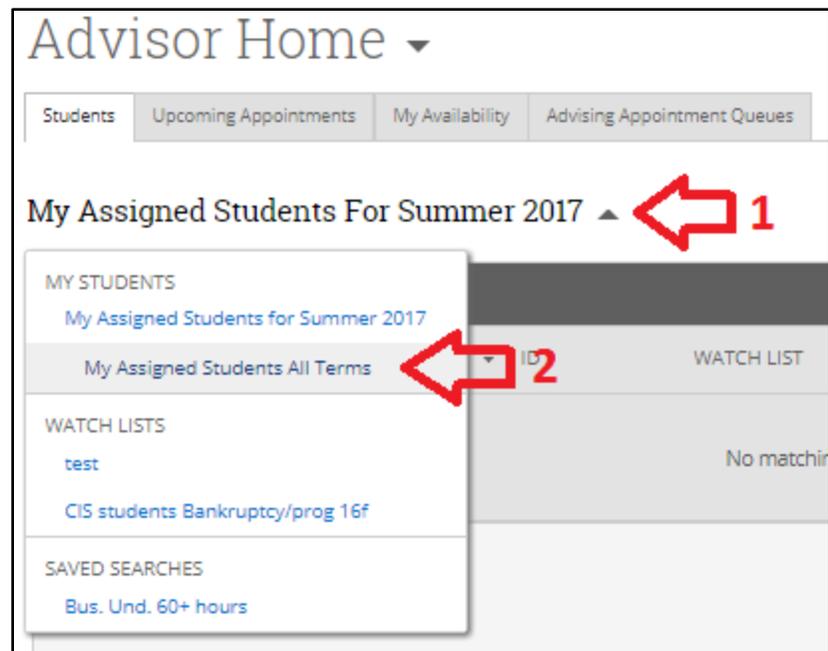
Upcoming Appointments

The upcoming appointments tab will allow you to view all of your scheduled upcoming appointments in a list and include links to the students' CardSmart profiles and the details of the appointment (date, time, location, comments, appointment reason, etc). By selecting students from this list, you can use the **Actions** drop down to message students, add an advising report, or cancel appointments. You can message multiple students and cancel multiple appointments at a time using this feature, but adding an advising report can only be done one at a time.

Advisor Home ▾

| Students | Upcoming Appointments | My Availability | Advising Appointment Queues |

Upcoming Advising Appointment

Actions ▾						☐ Show Cancelled
☐	DATE	ATTENDEE	REASON	COMMENT	REPORT FILED?	DETAILS
☐ 1/1	06/30/2017 10:00a - 11:00a	Student, Test	AA Career Planning	Katie Etheridge: test	Not Yet.	Details

Setting Advisor Availability

The **My Availability** tab displays the days, times, dates, location, and types of appointments for which you will be available and allows you to add, edit, or remove these availabilities. Here you will also be able to edit your appointment constraints, such as default appointment length and amount of time a student must schedule an appointment in advance.

Advisor Home ▾

| Students | Upcoming Appointments | My Availability | Advising Appointment Queues |

📅 Edit Appointment Constraints

Times Available

Actions ▾						
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	SUBJECT	
○	Mon, Tue, Wed, Thu, Fri	10:30a-11:30a	Forever	Business	AA External Transfer For Appointments	Edit
○	Mon, Tue, Wed, Thu, Fri	11:30a-12:00p	Forever	Business	AA Acad. Planning/Registration, AA General Appt. Camp. For Appointments	Edit
○	Mon, Tue, Wed, Thu, Fri	9:30a-10:00a	Forever	Business	AA Acad. Planning/Registration, AA Add/Change Major/Minor, AA Career Planning, AA Co-Curricular, AA Degree Audit, AA External Transfer, AA Flight Plan Milestones, AA General Appt. Camp., AA No Reason Specified, AA Student Success For Drop-Ins	Edit
○	Mon, Tue, Wed, Thu, Fri	9:00a-9:30a	Forever	Business	No listed Student Services	Edit

Click the "Actions" drop down under "My Availability" to add, edit, or remove your availabilities. Availability types determine if you are available for drop-ins, appointments, or campaigns. You can set these availabilities to be active for a particular semester, run for a range

of dates, or continue until you delete them ("forever"). The "appointment reasons" that you enter (such as "AA Student Success" or "AA Degree Audit") will limit the reasons for appointments that can be scheduled during that time. This is important when sending appointment campaigns because only the reasons listed under each of your times will show as available for students viewing a campaign sent for a particular reason (such as "AA Student Success"). Your campaign reason must align with your appointment availabilities reason if you wish to make those times available to students via campaign. For example, if I send a campaign to new transfer students with the reason set to "AA External Transfer", the availability of 9:30 to 11:30 (pictured below) will not show up for the students receiving the campaign because I have not listed that appointment reason.
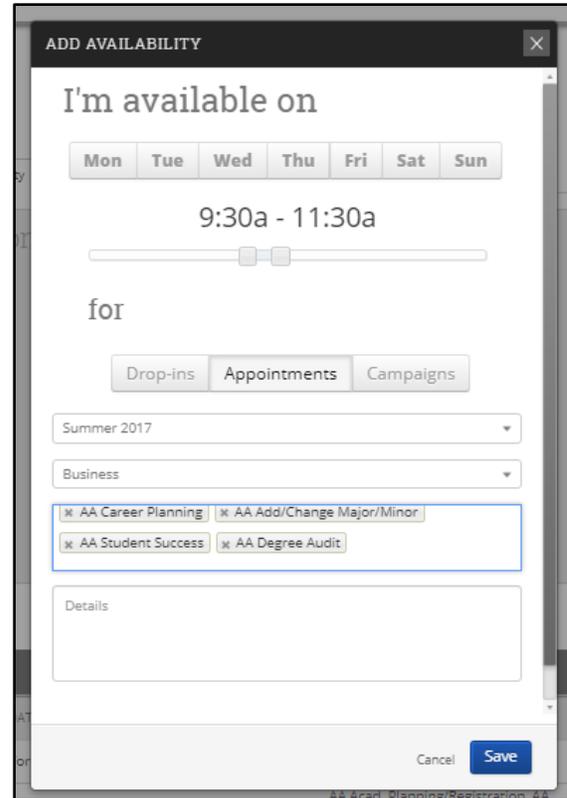
If you are adding a lot of availabilities at once, you can select "copy time" from the actions drop down while an availability entry is selected and edit the day or time for your next availability entry.

By clicking on **Edit Appointment Constraints** at the top of the **My Availability** tab, you can set how many hours in advance you want appointments to be able to be made by students via campaign, set your default appointment length, and control whether or not students can schedule appointments outside of your availabilities if they receive an appointment campaign invite. Please keep in mind that front desk staff are not affected by these constraints and can schedule outside of your "hours in advance" rule, appointment length, and availabilities if you so wish. Check with your unit on common practices with appointment constraints and availabilities.

Advising Appointment Queues

The last tab shown on your Advisor Home page allows you to view the **Advising Appointment Queues** for yourself and other advising staff within your office. If you have a student checked in for a scheduled appointment with you, they will show in the queue for **Students Checked in For Appointments** and **Students in My Queue**. If you set drop-in availabilities under your availability, students will be able to drop-in and be added to your queue called **Students In My Queue** as well. The third queue list, **Students in Other Staff Queues**, displays students that have checked in for other advisors in your office. Using the "Actions" drop down for each queue list, you can begin the appointment, message the student, check out, or remove them from the queue. Checking out a student with an appointment is typically used if the student is checked in in error before their arrival. It will keep their appointment and allow them to be checked in when they arrive later.

Quick Search

The Quick Search feature is found along the top right of the screen by clicking on the magnifying glass icon. To test this, enter "1248958" in the search field. When the student's name appears below the search field, click on it to view that student's CardSmart profile.

Training Tip: Within the training site, you can search any matriculated student to fully test the features available to real student profiles without affecting anything in the live site. When you first click a matriculated student's profile, you will get an overview of their information. See the following section for information on features on the student profile. Some profiles are not as complete as others if they have recently been admitted, have not attended U of L in some time, or if it is a test profile.

Navigating the Student Profile

The student's profile (if fully matriculated) in CardSmart includes the following information:

- Earned D's/F's
- Repeated Courses
- Withdrawn Courses
- Missed Success Markers
- Cumulative U of L GPA
- Total Credits Earned
- Credit Completion % at U of L
- Predicted Risk Level
- Major (and any Major history)
- Student and User ID
- Classification
- Academic Standing
- Most Recent Enrollment
- Advisors
- Categories and Tags (Hold)
- Quick Links to: Message, Add a Note, Add a Reminder, Report on Advising, Schedule an Appointment, or Add to a Watch List
- Student Photo
- A Drop-down for Student Info that includes email, phone, and address

Note:
If they have recently been admitted, have not attended U of L in some time, or if it is a test profile some sections will have less information.

To view past semesters for the student, return to the "Term" field in the toolbar at the top of the screen. Use the drop-down arrow to select the desired term. This primarily affects the "Class Info" tab that lists the student's enrolled classes for that given semester. NOTE: CardSmart will always default to the current term after logging in to the system.

From the student's profile, you can view any upcoming appointments the student has with advisors, tutors, and career coaches, all visit notes and general notes attached to the student's profile (including those filed by other advisors), messages sent to the student by all advisors ("Conversations") and the student's calendar. The calendar includes the student's course schedule for the selected term and any advising, tutoring, or career coach appointments.

Upcoming appointments, the calendar, and conversations are all available under the "More" tab on the student profile.

Success Progress

This tab provides charts that display GPA Trends and Credit Trends by Term, with a summary of GPA and credits attempted versus completed at the bottom.

The **GPA Trends By Term** graph allows you to quickly identify significant changes or trends in a student's cumulative and term GPAs. Cumulative and Overall GPA are the same at U of L.
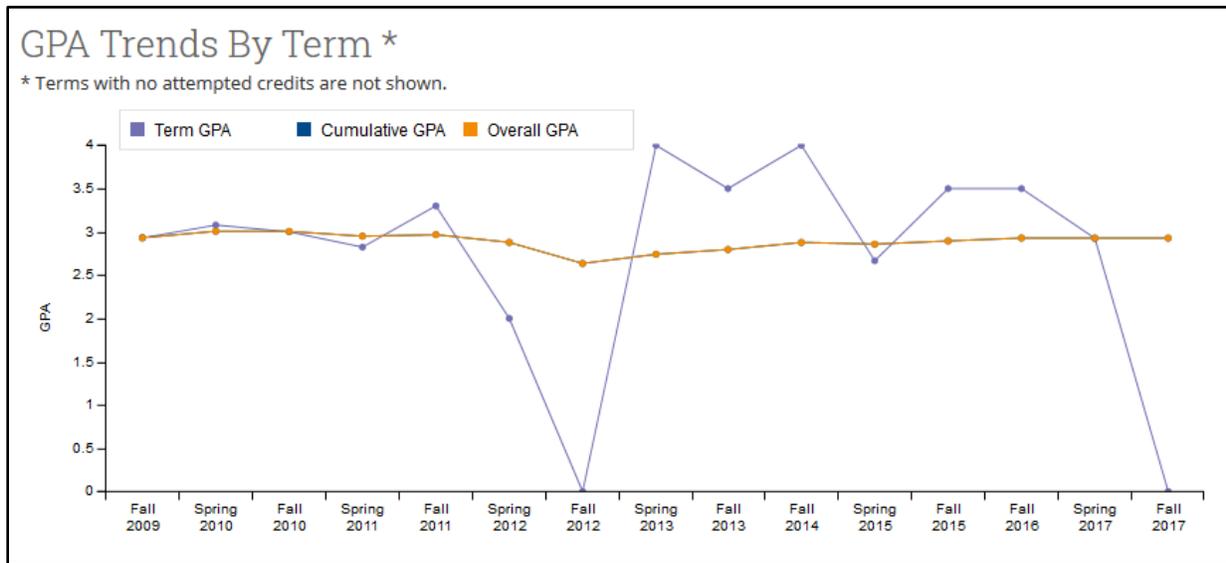

The **Credit Trends by Term** graph can quickly identify semesters in which a student attempted credits they did not ultimately earned (failed courses) or dips in attempted credit hours
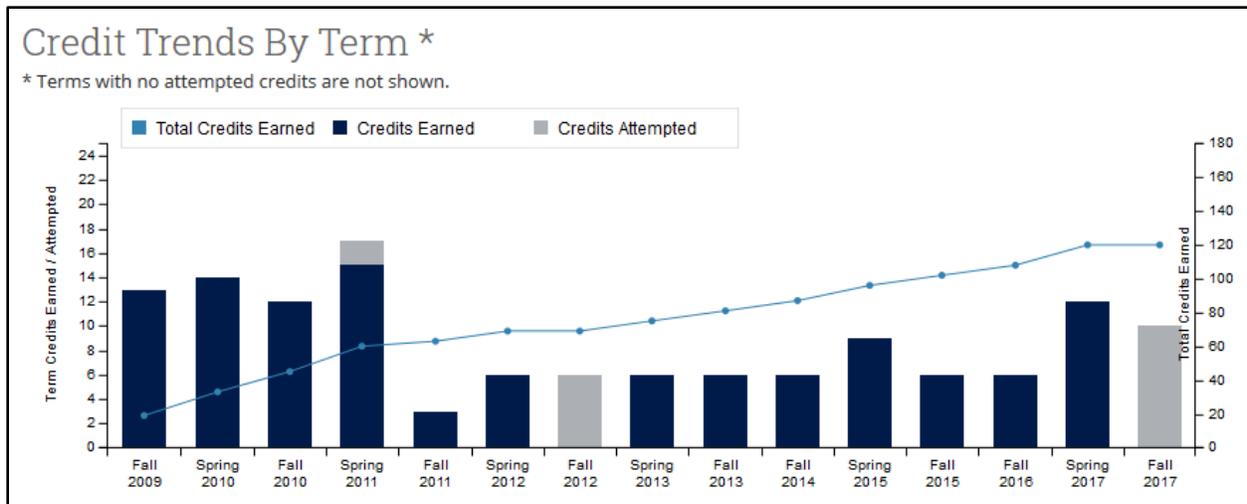
Reports and Notes

To view past Advising Reports and Notes on a student's profile, select the "Reports/Notes" tab. The first section on this tab will show you any **Reminders** you have saved for the student. The next section will show you **Notes** about that student, which can include things like notes from Student Success Coordinators, BSSE survey results, or orientation information. **Open Cases**, **Alerts**, and **Progress Reports** are related to the Progress Reports filed by faculty for the student's coursework. If a student is deemed at-risk for course performance by their professor, it will show in this area. Next is the **Advisor Reports** section where advisors' appointment reports for the student will be listed.
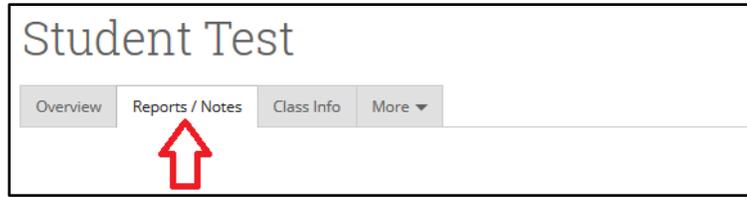
There are two ways to view the full text of a past **Advising Report**. First, you can hover over the text of a report in the **Summary** column, which will produce a pop-up text box with the full text of the report. Second, you can click **View Report** under the **Details** column which will produce the full Advising Report pop-up window you see when you create an Advising Report.

DATE	REPORT FILED ON	COURSE	FOLLOW-UP	MEETING TYPES	SUMMARY	
03/08/2017 10:00 AM	03/08/2017			N/A	has classes in hi...	Details
09/29/2016 01:30 PM	09/29/2016			N/A	wanted to discuss...	Details
03/24/2016 10:00 AM	03/24/2016			N/A	IUT in Good Standing from C...	Details
02/03/2016 11:00 AM	02/03/2016			N/A	FIN. Interested in adding ...	Details
11/09/2015 09:00 AM	11/09/2015			N/A	plans to take ECON ...	Details
04/07/2015 04:00 PM	04/07/2015			N/A	FIN update	Details
11/05/2014 03:00 PM	11/05/2014			N/A	Freshman finance	Details

Adding a Note to a Student's Profile

To add a note to the student's profile, select **Add a Note on this Student** under the Staff Alerts dialog box on the top right of the student profile.

Staff Alerts 0

I want to...

Message Student

Add a Note on this Student

Add a Reminder to this Student

Report On Advising Appointment

Schedule an Appointment

Add to Watch List
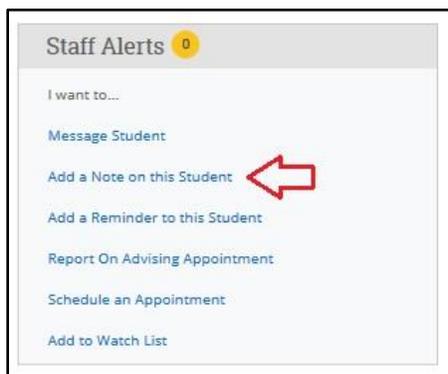
Fun Fact… What's a Note?

Notes differ from advising reports in that they are used to capture information about a student that is not directly tied to the advising appointment. They can also be used to upload an attachment and link to external documents.

Enter the text of the note in the **Note (Required)** field. To attach a document, click **Browse** and search for a file on your computer. **Note Reason** is category used to differentiate types of notes. You can use **Note URL** to link to any webpage or file on the web. If you want the student to see the note, click the box next to the student's name under **Visibility**. Leaving this unchecked will make the note invisible to the student. Once you have entered all information, select **Save Note** to add the note to the student's **Reports/Notes** tab. All notes created by anyone on a student's profile will appear here.

Adding an Advising Report from a Student's Profile

(For a Student without an Appointment)

When a student meets with you and does not have an appointment, the appropriate way to add an advising report is by visiting the student's profile and selecting **Report on Advising Appointment**.

Enter the **Reason(s)** for the appointment. You may list multiple reasons - your unit should help you understand how to use reasons.

Enter the **Meeting Type** and **Location**. You can ignore the **Course** drop-down; that value is there for recording tutoring visits.

If you open the Advising Report when the appointment begins, the **Arrived** time will record for you; similarly, if you complete and save the note upon the end of the appointment, the **Departed** time will record automatically as well. Otherwise you must enter these manually. The advisor time should reflect the time the appointment was scheduled to start and end and the student time should reflect the actual appointment time.

UofL Best Practice

Advisor Time (Arrived & Departed) should match the scheduled time for the appointment.

Student Time (Arrived & Departed) should reflect the actual appointment length.

Within the **Appointment Summary** field, enter your visit notes. You can attach any relevant files at the bottom.

Click **Save the Report** when finished. This will log the student's departed time. If you are new to saving reports, then check the time arrived and departed for accuracy.

The report will now be entered on the student's **Reports/Notes** tab for future reference. **Advisor Reports** will be available past notes, open cases, progress reports and alerts for a student.

ADVISOR REPORT FOR TEST STUDENT

Appointment Details
An appointment will be created after you submit this report.
Reason:
× AA Career Planning
× AA Add/Change Major/Minor

Meeting Type:
× Face-to-Face

Course:

Date of visit:
07/27/2017

Location:
Business

Attendees
Katie Etheridge
Advisor, Student
☑ Attended
Arrived: 12:30 PM   Departed: 1:00 PM

Test Student - 1248241
Mathematics - BS (MATHBS)
☑ Attended
Arrived: 12:32 PM   Departed: 12:55 PM

Suggested Followup
This will be saved on the report as a suggestion. No appointment will be created.
Date: Time:

Report Details For Test Student
Developed a plan to get back on track with FP   ○ Yes ○ No ○ N/A
Appointment Summary

Details of the appointment go here.

body   p

Attachments
☞ Attach File
Choose File   No file chosen

Save this Report

Advisor Reports ▾

DATE	REPORT FILED ON	COURSE	FOLLOW-UP	MEETING TYPES	SUMMARY	
07/27/2017 12:30 PM	07/27/2017			Face-to-Face	Details of the appointment ...	Details

Class Info

The **Classes This Term** section will allow you to view class numbers, section, titles, days, times, and professors for the classes students are enrolled in. To view this information for past semesters for a student once you are on the student's profile, select the "**Term**" field beside the quick search at the top of the screen. Use the drop-down arrow to select the desired term. This is a handy way to find section numbers for classes they've taken in the past.

Campus
Student Success Collaborative™

Academics ▾   Fall 2017 ▾   🔍

Term

NOTE: CardSmart will always default to the current term after logging in to the system.

Below that section on "classes this term," you will find **Term Details** where each term or semester is listed with the credit hours earned, classes taken, grades, and a side bar on the right with **Term at a Glance** with GPA and academic standing information. This functions like a transcript with transfer work included. Clicking the drop down arrow next to each term will also provide term GPA, cumulative GPA and credits attempted that semester. At the end of this section, ACT scores, basic high school information, AP credit, and transfer credit will be listed.

Appointments

In the **Appointments** section under the "More" tab, you will see the upcoming, recent, and no show appointments for this student. To view the time and details of an upcoming appointment, check the **Conversations** tab for the appointment confirmation or the **Calendar**.
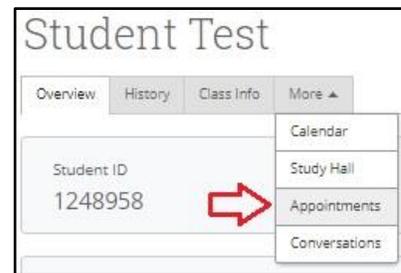
Click on the **Details** button of a recent appointment to be able to see the full details from the past appointment.

Adding and Removing Student Tags

Use the **Quick Search** at the top of the page to search for a student profile. Once you find the student, you can locate their **Tags** at the bottom of their profile, such as the ones below.

You can select **Manage Tags** in the top right corner of the Tags section in order to add or remove the tags associated with the student profile:

To **add a tag**, click in the space where the tags exist, and start typing the tag you would like to add. CardSmart will populate a list of tags with the same beginning. You can select the tag desired from that list.
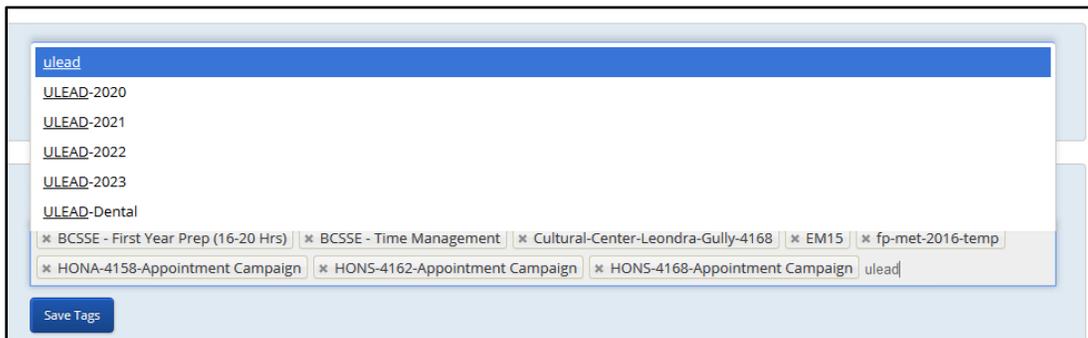
To **remove a tag**, click the "X" to the left of the existing Tag to be removed. Select **Save Tags** once all changes have been made.
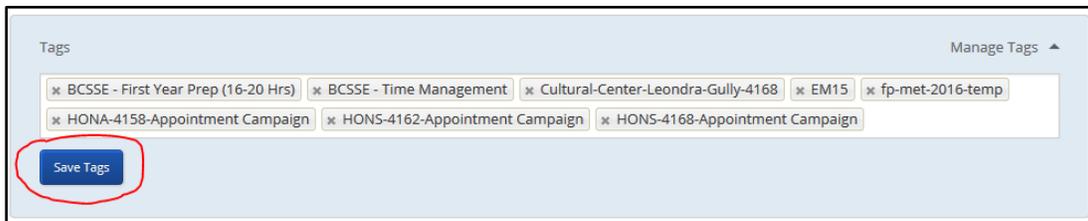
Viewing and Searching for Students with Holds

Use the **Quick Search** to check for a hold on an individual student. Once you find the student, you can locate any holds they have at the bottom of the screen in the **Categories** section. It is near the bottom of the student profile overview page.

You can use the **Advanced Search** feature to find all students with a specific hold or all of your students with a specific hold. First, click the **Advanced Search** icon in your toolbar to the left of your screen. Next, check the box to "Show Advanced Filter" in the top right of that screen.

Select the **Student Information** drop down and find the holds you wish to check for under the **Category** section. By clicking the plus icon next to "Category (In Any of these)," you will be able to search for students with one category/hold **or** another category, one category **and** another category, as well as students that do not have a specific category. In the category box, if you type "hold," you will see all of the available holds in PeopleSoft.

In addition, you can select yourself or another person as the advisor by checking the "My Students Only" box at the bottom or by entering an advisor in the "Assigned To" field. This will allow you to search for only your students or another advisor's students.

Communicating with Students

You can send messages to individual students by using Quick Search to find their student profile (See Page 9), by finding them in your list of assigned students (Page 6), or by selecting them from the list of upcoming appointments in the Appointment Center. You can also use the Advanced Search feature to search for specific groups of students and message en masse or individually. This section will address each type of communication.

Messaging from the Student Profile

Search for the student by using the Quick Search box at the top right of the screen. You can use the test student ID# 1251014.

On the right side of the student profile, you will see a box titled "Staff Alerts." Click "Message Student" to compose a message to that student.
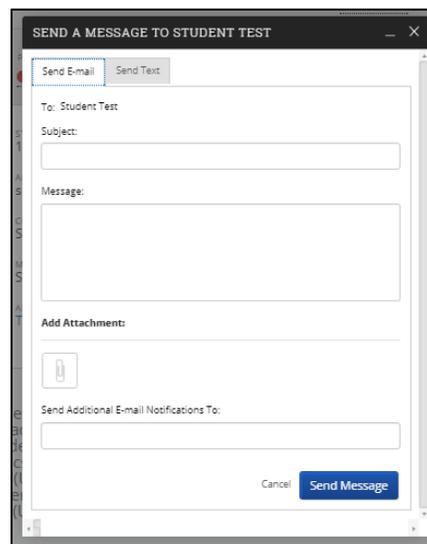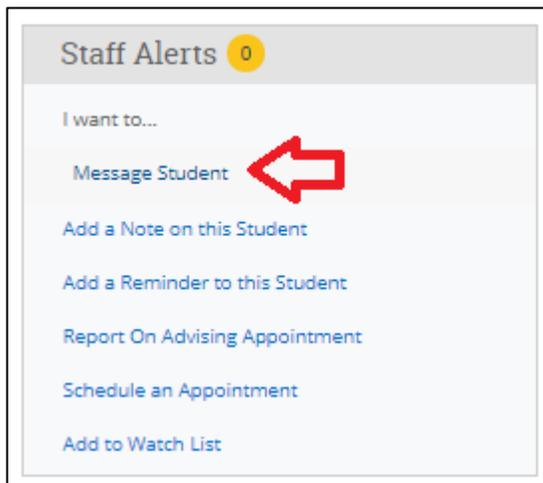
Fill in the subject and the message sections. You may also attach documents by clicking the paperclip icon under **Add Attachment** and searching for the file on your computer. If you wish to copy anyone else on the message, enter the email address for that person in the "Send Additional E-Mail Notifications To" box. Click **Send Message**. Your message will also appear in the **Conversations** tab on the student's profile. These messages can be accessed by anyone on CardSmart via that tab on the student's profile.

Sending a Message from Your List of Assigned Students

Go to your **Home** page. You will see the **My Assigned Students For [Current Semester]** tab and your list of students below. If you would like to see all of your assigned students (including those not enrolled in the current semester), click the drop down and change this to **My Assigned Students All Terms**. Select "All" or place a check next to the students you wish to message.

Then from the **Actions** drop down, click **Send Message**. The same box will appear for you to input the appropriate information.
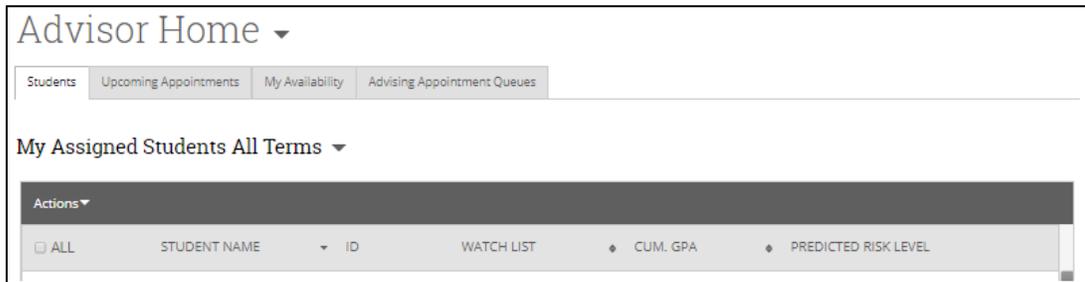
From your assigned students list, you can send a mass message, add an advising report, create an appointment campaign, schedule an appointment, add a note, mass print, select students for a watch list, or export select student information.
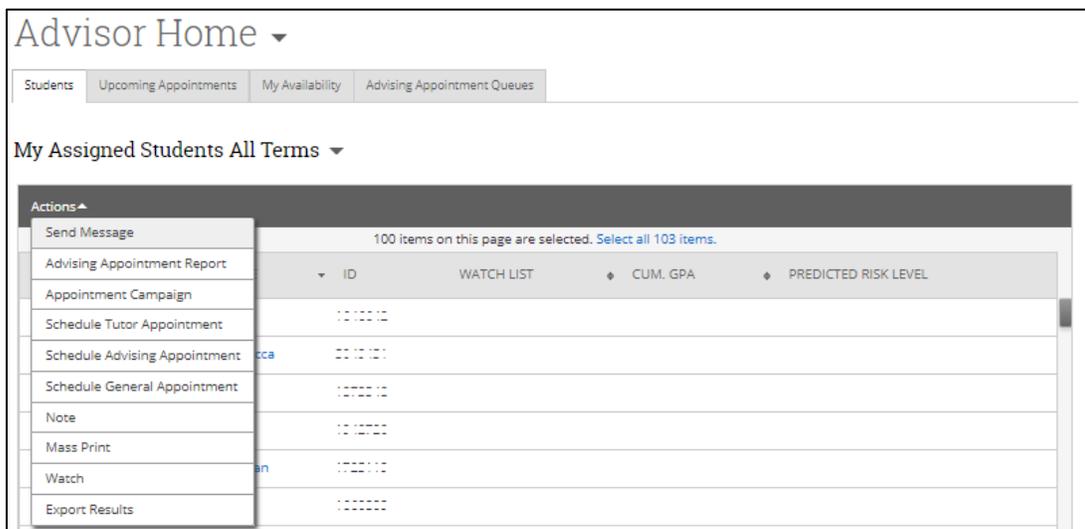
Using Advanced Search to Communicate with Students

Click "Advanced Search" (magnifying glass icon) from the toolbar on the left of your CardSmart screen. Then click the "Show Advanced Filters" box towards the right of that screen
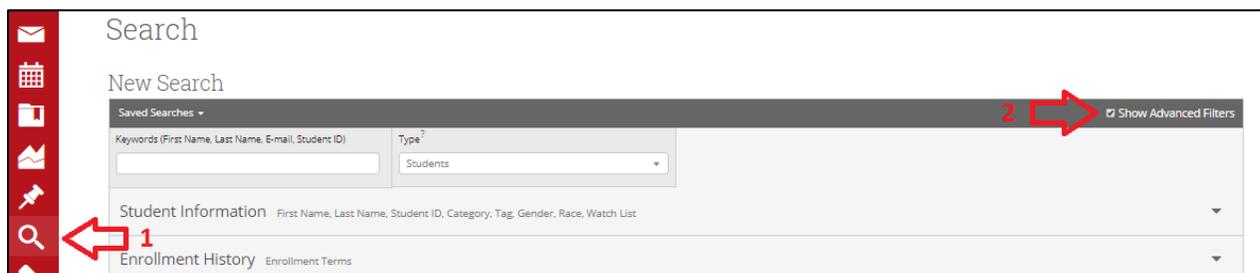
Enter your desired search criteria and click "Search." You can then check "all" to select all students that meet that search criteria, or you can select individual students by checking the box next to their name. Once you have your selected your list, select "Send Message" from the actions drop down, just like from your assigned students list. The same box appears for you to input the appropriate information included in your message.

You can search for students based on a wide variety of criteria within each section of the Advanced search (subjects listed in the screenshot below). In addition to these search criteria, there are check boxes at the bottom that can restrict your results to your assigned students, students labelled "at-risk," or to include inactive students. Enter the information by which you wish to search for students and then click "Search" at the bottom of the screen.

IMPORTANT: When conducting an advanced search, do not hit the "back" button on your browser. You'll lose your search information and have to start over. To remove specific search criteria, you can click

the "x" next to that individual item along the top of your results. To add or otherwise edit criteria, click "modify search." You can also save your search on this page. See page 45 for more information on saved searches.

How to Send Students a Text Message/Notification

From the Student's Profile:
Select **Message Student** and then click the **Send Text** tab. Once you enter the message, select **Send Message.**
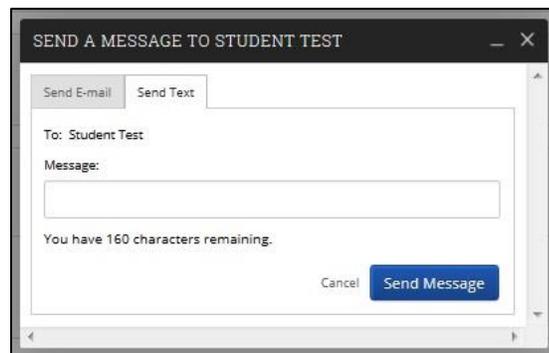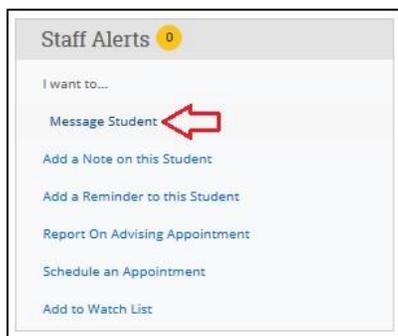
From a Search Function:
Perform a simple or advanced search as normal. Once your list of students comes up, you can select **All** or a select number of students by checking the boxes next to their names. From there, use the "Actions" drop down and select **Send Message**. The number of students and an option to display all recipients will be displayed. As above, select **Send Text**, enter your message and then **Send Message.**

From an Appointment Campaign:

When you have completed the steps of setting up your appointment campaign, on the **Confirm & Send** page, you will see an option for text in the **Reminder** section. Check the box by SMS. This will send a text reminder to any students who have signed up for the text option.

From the Calendar

If an appointment is created through the calendar, at the bottom left side of the screen there is a section for **Reminders**. Be sure that sending a **text reminder** is checked.

Appointment Campaigns

Note: CardSmart allows you to run multiple campaigns/availabilities simultaneously using student services/reasons. You will want to talk to your Advising Center director about the standard student services/reasons for various campaign types used in your unit.

Sending an Appointment Campaign

First, arrange your availability for the campaign.
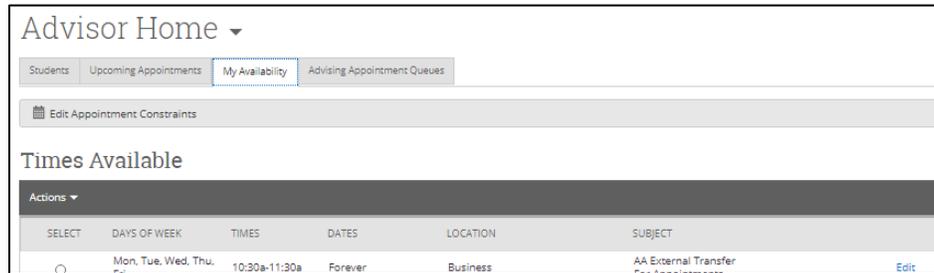
Underneath the time for your availability, select "Campaigns" because you are entering your availability for a campaign specifically. (Do not select Drop-Ins or Appointments or you will have appointments and be open for drop-ins during the same time as your campaign.). Under "Duration", select "A Range of Dates" and enter the specific dates of your campaign. Make sure your selected Student Services match the appointment reason you will list later when creating your campaign. You're ready to create and send out an Appointment Campaign that matches this availability.

Select "Appointment Campaigns" from the Quick Links box on the right side of your **Advisor Home** page.
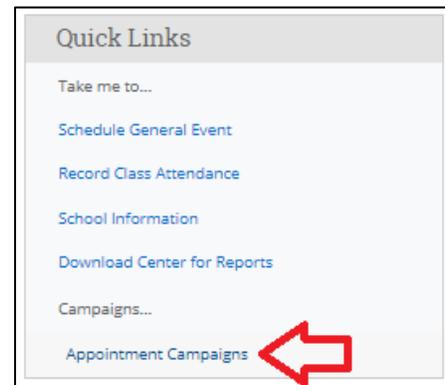
This brings you to your Campaigns page where active campaigns can be monitored and unsent campaigns can be edited. Select "Appointment Campaign" from the actions dialog box on the right side of the screen.

Enter the "Campaign Name", such as "A&S Acad. Planning Campaign for Freshmen, Fall 2017." Enter the "Campaign Type" by selecting "Advising Appointment." "Slots Per Time" will be 1 (this is the default). Enter the "Course or Reason." **This must match Student Service selected when you set your Availability**. For this example, it may be "AA Acad. Planning/Registration." Enter the dates for your Campaign, matching the dates you selected for this campaign in your availability, and set your "Appointment Length." (i.e., 30 minutes). "Appointment Limit" defaults to 1 so that you have one appointment at a time. Set the "Location" for your appointment to your unit and click **Continue**.

You will add students to the campaign by selecting them from your assigned students or via **Advanced Search**.

Advanced Search

When performing an "Advanced Search," you can look for students in a variety of ways. For this example, we will select "No preference" for enrollment status, select "College of Arts and

Sciences" under Area of Study, and enter 30 into the "Max. Credits Earned" under Performance Data.

You can search on a wide variety of criteria. Subject tabs include "Student Information," "Current Term Data," and "Assigned To." Within each of those, you will see a variety of search options. Enter the information by which you wish to search and then click "Search" at the bottom of the screen.

IMPORTANT: When conducting an advanced search, do not hit the "back" button. You'll lose your search and have to start over. You can add additional criteria to expand your search or edit any set parameters. Simply click "Modify Search", make your desired changes, and then hit "Search" again.

Another frequently used option is to search by the Course Data, such as PSYC 201. After selecting Enrolled in Fall 2017 at the top of the search, find the course under "Course Data." You can then opt to check the box next to "My Students Only." And click "Search."

When using Advanced Search within the creation of a campaign, a list of students will appear, and you can select "All" or check the box next to the students you wish to include. Click "Continue." Then you will have the opportunity to review your selected students. From that screen, you can remove students via the "actions" drop down or search for more using the "Add More Students" link. When your student selection is complete, continue on to add advisors to your campaign.

You will need to add advisors to the campaign. Select the advisors who are taking part in the campaign and click "Continue."

Compose your Message to students that will receive your campaign. CardSmart has an email template set for you. Edit the subject for your campaign email in the first box if you wish. Write your specific message in the second box. You can also enter instructions for the landing page, such as a phone number to call with questions or any other desired information, after the message box. Take care not to change the "Merge Tags" for the appointment scheduling link or for student name if you wish to keep it.

Scroll down and you will see an **Email Preview** and **Landing Page Preview** for the Campaign. Click **Continue**.

Review the details of your Campaign and then click **Send**.

You'll be asked to confirm one more time before clicking **Send Invitations Now**.
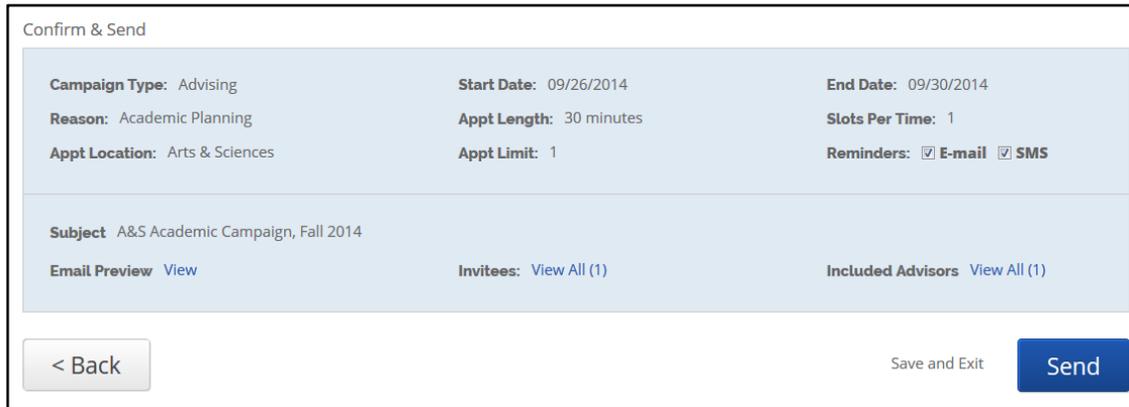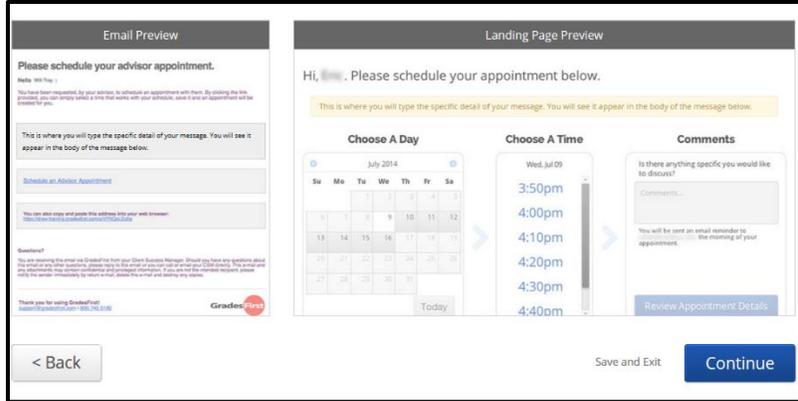
Your students will receive an email from you with a link to schedule an appointment. Once they schedule the appointment, it will show up on your calendar in CardSmart as an Advising Appointment. The student will also receive confirmation and reminder emails regarding the appointment.
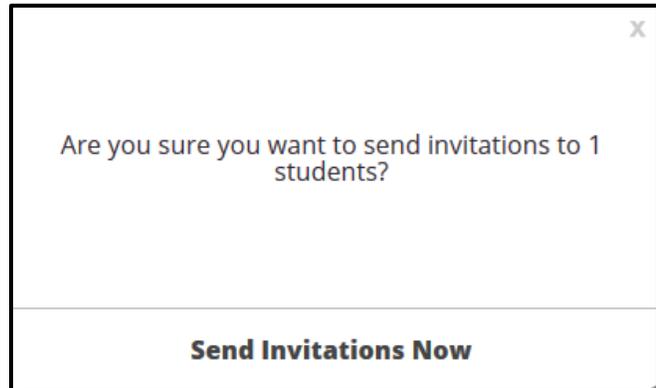
Adding Students to a Campaign

Use these instructions if you have already created and sent out your campaign, but realize you need to add a student(s) to the campaign.

From your home screen, select "Appointment Campaigns" from the Quick Links box on the right side of the screen or select the campaign icon from your toolbar on the left.

Select the campaign you would like to add the student(s) to. From the Options box on the right side of the screen, select "Edit Campaign Details."

In the **Details for Appointment Campaign** Box, click **Edit** the Student Select section. At the bottom of that screen, click "Add More Students."
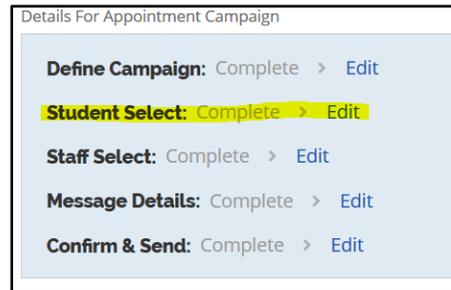
If you are adding one student (or just a few students) to the campaign, you can enter them by Student ID. Enter their ID number into the Student ID field under the Advanced Search option. Then click **Search**.
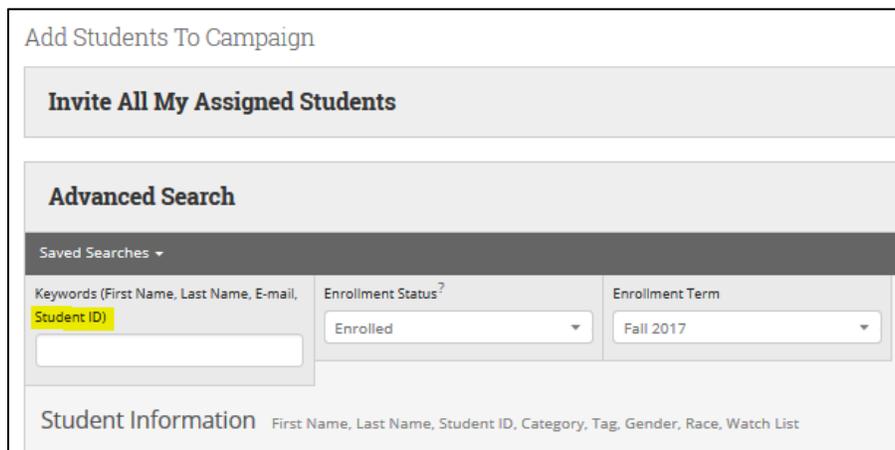
Check the box next to the student's name(s), and then select "Add Selected Users and Search for More" from the Actions drop down menu. Select **Modify Search** to add more students or **Continue** if you are done adding students.
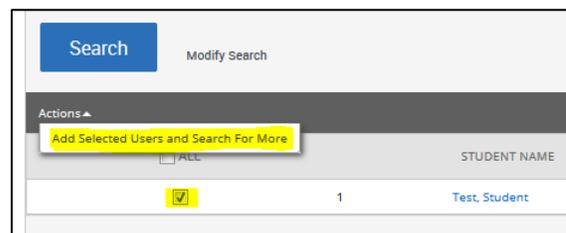
Once you have added your additional student(s), you will be asked to **Review Students in Campaign**. You can go back to **Add More Students** from this screen or click **Continue** to move on.

This will bring you to **Add Advisors to Campaign**. Click Continue if you are not changing this part of the campaign. **Compose Your Message** will come next. Click Continue if you are not changing this part of the campaign. On the **Confirm and Send** screen, you will see that the

campaign lists the total number of students in the campaign. You might worry that you're going to re-send the campaign to every student. That's not the case. Click **Send**. You will be asked if you want to **Invite Only New Students** or Re-send All Student Invitations. The key is to invite only the new students.

Click **Invite Only New Students** and the campaign is on its way to the added student(s).

NOTE: If you have a group of specific students you need to add to the campaign, it may be easiest to create a tag for that group of students.
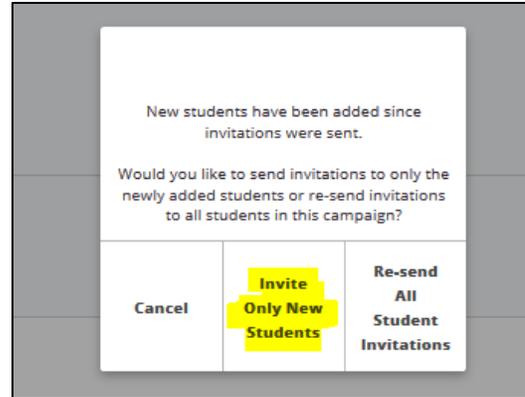

Managing an Existing Campaign

To check the progress of your campaign, you can select the **Campaigns** icon from your toolbar to the left. This will display your created campaigns: drafts, current, and future. Sent campaigns will have **% of Appt.s Made**, **% of Reports Created**, and **Attendance Rate** listed beside the campaign title and dates. To view **Appointments Made**, **Appointments Note Yet Made**, **Reports Created**, and **Eligible Appointments**, click the title of your campaign.

Under the **Appointments Made** tab of your campaign, you can see the date, time, link to the student profile, and click **View Details** to view the advisor's appointment report. Under **Appointments Not Yet Made**, invited students who haven't scheduled yet will be listed by name and email with a link to their profile and the option to select multiple students (or all) and resend the appointment campaign invitation. **Reports Created** will give you an overview of the advisor's notes for appointments that have past and the option to view the full report. **Eligible Appointments** allows you to associate appointments made outside of the campaign (with the same student, range of dates, appointment reason, and location) with the campaign to accurately track which invited students have not yet made an appointment.

Once created, appointments set using the Appointment Campaign feature behave like all other traditional advisor appointments in CardSmart. Once the appointment time has passed, it will show up under **Recent Appointments** on your CardSmart homepage. From there, you can mark the student as a no-show or enter the visit notes by filing an Advisor Report.

Beginning an Advising Report When a Student Checks In

Once the student has checked-in at the front desk, they will appear in your **Advising Queue**.
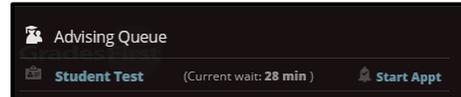
Begin the appointment by clicking **Start Appt** in the Advising Queue. This will open the Advising Report and **Time Arrived** will be recorded automatically in the report. Enter the relevant information and the **Time Departed** will automatically populate upon saving. For more instructions on filing a report, see page 13.

Follow Best Practice
When you use this method, you don't need to enter time arrived or departed.

Advisor Time (arrived and departed) will reflect the scheduled appointment time.

Student Time (arrived and departed) will reflect the actual time spent with the student.

Actual appointment time includes not only the time spent with the student but also the time spent preparing and the time spent entering the notes into the report.

Appointment Center

Creating an Appointment from the Appointment Center Mode

Select the **Appointment Center** mode from the bottom right of your CardSmart home screen, and then select your Advising Center location.

Enter the student's ID number or and click the student's name from the drop down results.
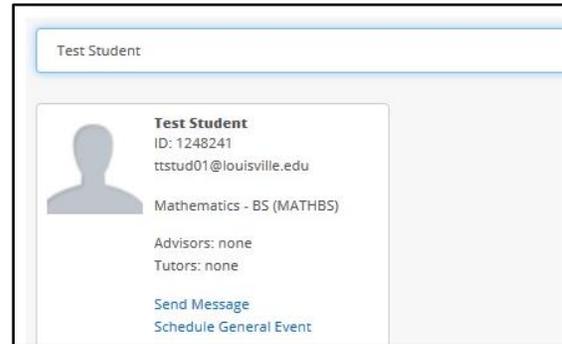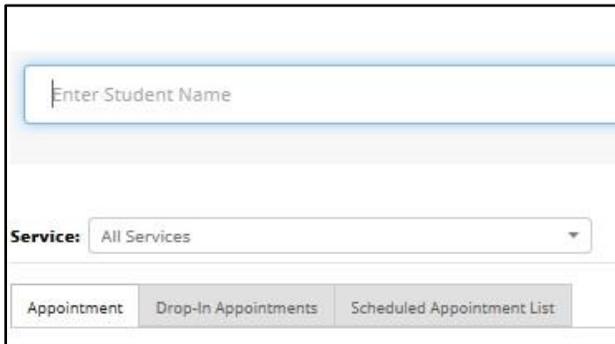
The calendar will show the current day and the list of advisors with availability that day. You can select either **First Available** to the left or a particular day and time frame. Click **Reload** above the mini calendar to update the view each time you change the date or other parameters.
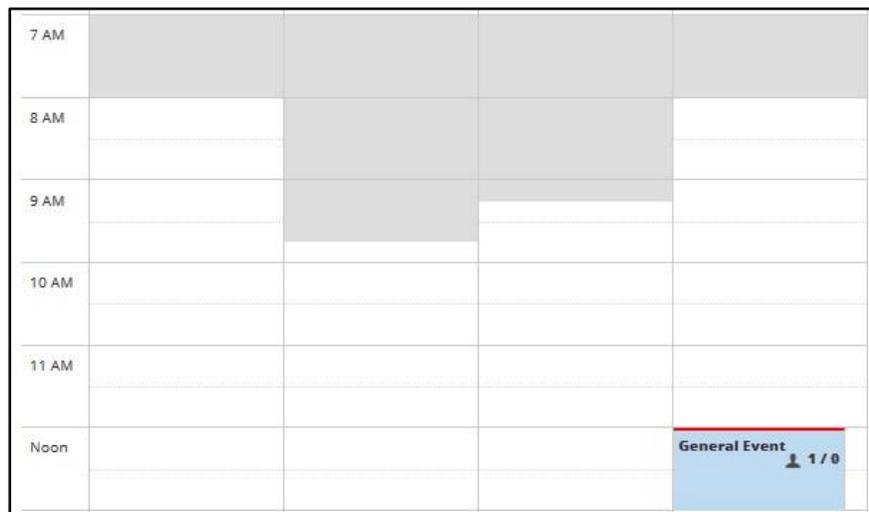
From this screen, you can see open appointment possibilities (times that aren't gray for that advisor or have other meetings shown) and can select an option that corresponds with the student's availability.

Click the desired advisor and time slot and the **Create an Advisor Appointment** dialog box will open. Confirm that the information is correct and select a **Service** for the appointment.

Click **Edit Details** to add information to the appointment or change the date or time.

As soon as you hit **Save Appointment**, the appointment will appear on the advisor's calendar and the student will get an email. The student will also get an email reminder the morning of the appointment. A sample of the student email appears below:

Editing an Appointment from the Appointment Center

Select the **Advising Center** mode from the bottom right of your CardSmart home screen. Select your Advising Center location.

Locate the appointment on the calendar and click anywhere within the blue box for the appointment to open it up.
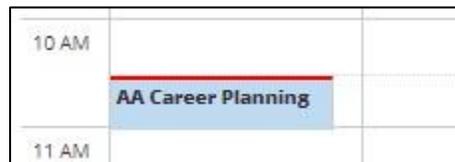
This opens the **Manage Appointment** dialog box and allows you to edit the appointment. (You can also move, delete, or cancel the appointment from this screen.)

Select **edit**. You will be returned to the scheduling screen where you can change the date for the appointment, add or remove attendees, change the location, and change/add the reasons for the appointment. If you click another date, you may have to reselect the advisor for the appointment. Once you make the necessary changes, click **Save Appointment** at the bottom of the screen.

Changing the Date:
Select the new date on the small calendar to the left and confirm on the schedule to the right that the new time is available. Make sure that the appropriate advisor is still selected. Check the box for the new appointment day/time slot and click **Save**.

You can verify the move by checking the calendar in the Appointment Center for the new time slot.

Most likely, the front desk may only have a need to change the date and time for an appointment; however, the following changes can be also made from the Appointment Center:
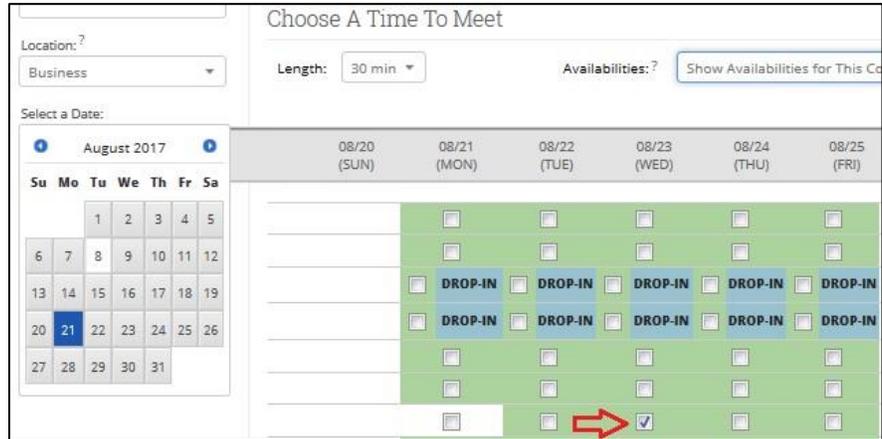
Adding or Removing Attendees:

In some cases, you may need to assign a different advisor. To do so, you will first need to remove the current advisor by clicking the "X" at the end of the line with their name.

This will bring up the "Select An Advisor" box where you will find the appropriate advisor. Selecting them will update the schedule to that advisor's availability. Once you verify a time on the newly added advisor's schedule, click **Save Appointment** at the bottom of the screen to be sure your changes are made. That change can be verified by checking the new advisor's calendar. The added individuals should also receive an appointment confirmation email.

If you wish to have two advisors in the appointment, the other advisor will have to be added as an "attendee" rather than the assigned advisor for the appointment.
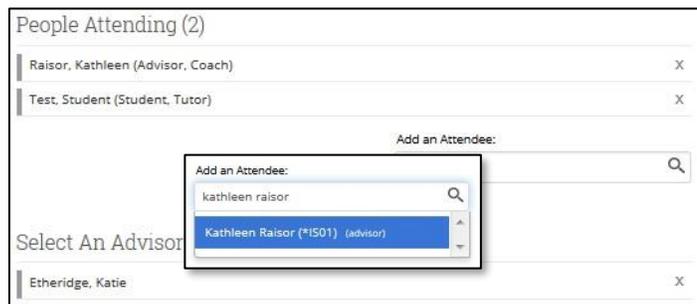
Changing the Location:

Although this change is not likely to be needed, it is possible to move the appointment from one location to another. Simply select the new location from the drop-down box and then **Save Appointment.**

Changing/Adding Reasons:

Most appointments made from the front desk will indicate one reason for an appointment. Additional reasons are added by the advisor through discussion with the student. However, if multiple reasons are provided at the time the appointment is made, those reasons can be selected from the Appointment Center by editing the appointment. In the "Reasons" section on the left of the editing page, click the white space in the box around the already selected reason. This will bring up a drop down menu of other reasons, which can then be selected one at a time. To remove a reason, click the "X" to the left of the reason text. When all reasons have been added, click **Save Appointment**.
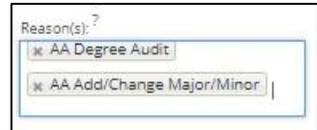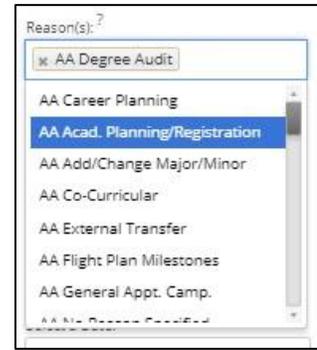
Cancelling or Deleting an Appointment from the Appointment Center Mode

Select the **Advising Center** mode from the bottom right of your CardSmart home screen. Select your Advising Center location.

Locate the appointment on the calendar and click the blue appointment box to open it up.
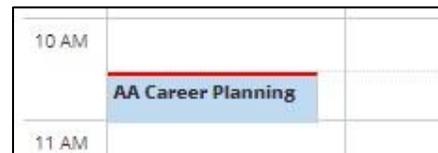
This opens the **Manage Appointment** dialog box and allows you to either cancel or delete the appointment. You can also move or edit the appointment from this screen.

> **Cancelling** an advising appointment allows you the option to track the reason <u>WHY</u> the appointment was cancelled, and it keeps a record that can be used for reporting purposes later. **Deleting** an appointment does not allow the option to track a reason and stores no record of the appointment.
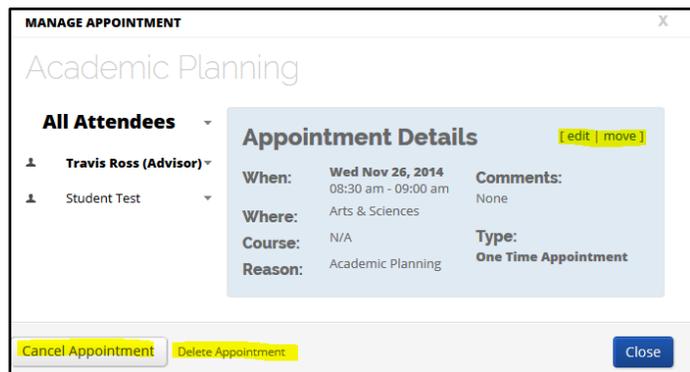
If you choose to **Cancel Appointment**, you will select responses in the drop-down boxes for the person who is cancelling the appointment and the reason it is being cancelled. You can include comments. If you select **Mark as Cancelled**, this entry will appear on your calendar. (Note that you can take other steps from this screen such as to delete the appointment or check the student in.)

If you choose to **Delete Appointment**, the appointment will no longer appear on reports or calendars. Choosing this option will not allow you to track **why** the appointment was cancelled.

Whether you **cancel** or **delete** the appointment, the student and advisor will get an email confirming the removal of the appointment.

DELETE ACADEMIC PLANNING   X

Are you sure you want to delete Academic Planning for the instance on 12/11/2014 10:00 AM-10:30 AM? It will no longer show up on reports or calendars.

cancel   **Delete Appointment Instance**
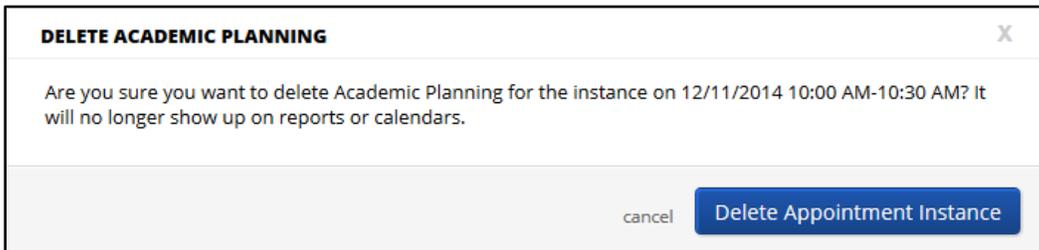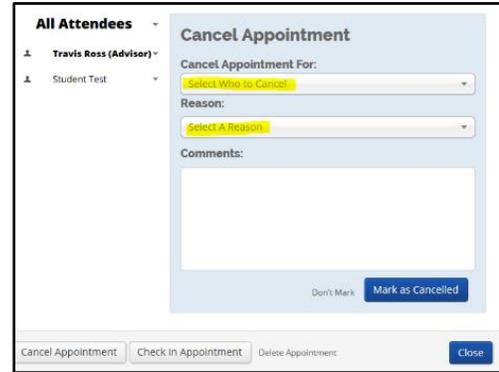
Adding Individual Appointments to Calendar

This exercise is used to make individual appointments that are not part of a campaign.
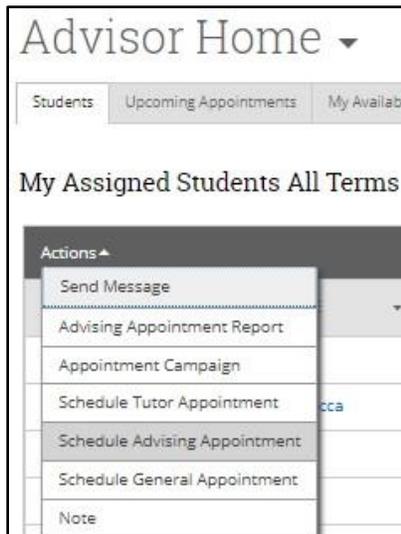
To make an advising appointment with a student, you can either select the student's name from your Assigned Students list or do a **Quick Search** for the student's profile. The image on the left comes from your home screen. Select a student from the **My Assigned Students All Terms** list and select "Schedule an Advising Appointment" from the **Actions** drop down menu. Alternatively, you can select "Schedule an Appointment" from the **Staff Alerts** box of links to the left of the student profile overview page.

Once you open the dialog box to schedule an appointment, you may fill out the details and select the advisor for that individual appointment. For **Type**, you should select "Advising Appointment" This will enable the advisor to add an Advising Report for the meeting. Select the **Reason(s)** from the available choices, add any **Comments**, and enter the meeting **Location**. Be sure to select the advisor, even if it is yourself and your name already appears as one of the people attending.
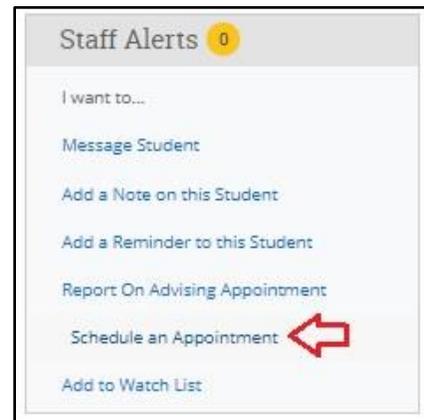
You can choose the date from the mini calendar on the left. Once you find an open time, check the box to select that time. Note that you can change the **Availabilities** drop-down box in order to schedule outside of set availabilities or during time conflicts (such as a student's classes). You can also change the **Length** of the appointment if desired. Once everything is completed, click "Save Appointment."

The advisor and the student will receive an email with the details of the appointment as soon as it is saved and a reminder email the morning of the appointment.

Assigning a Different Advisor to a Scheduled Appointment

You can open appointments from either the Upcoming Appointments tab (if they are your appointments) or from the Advising Center.

From the Advisor's Home page: Go to the **Upcoming Appointments** tab on your home screen.

Click **Details** and follow the editing steps as outlined below to make the necessary changes to assigned advisor, date/time, and reason for the appointment.

From the Front-Desk Mode/Advising Center: Select the **Advising Center** mode from the bottom right of your CardSmart home screen and select your Advising Center location.

Locate the appointment on the calendar and click on the blue appointment box to open it up.

Editing the Appointment:
Both of the options described above opens the **Manage Appointment** dialog box and allows you to edit the appointment. (You can also delete or cancel the appointment from this screen.) Select **edit**. This will open the screen that allows you to make changes to the appointment.
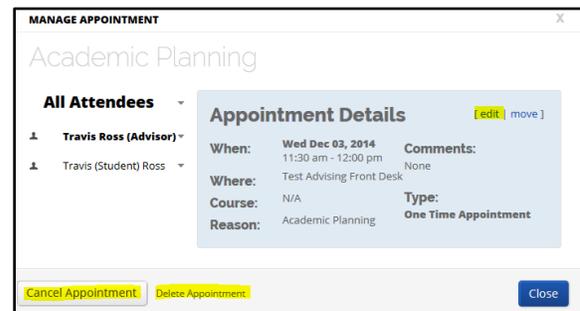
Assigning a Different Advisor: First, click the "x" at the end of the line with the previously assigned advisor's name. Then, you can select the advisor that you would like to assign. That advisor's schedule will populate below, and you can then select an appropriate appointment time. This calendar displays an advisor's availabilities a week at a time. Once you make the necessary changes, click **Save Appointment** at the bottom of the page.

Keep in mind that in addition to changing the assigned advisor, you can also use this process to change the date/time for the appointment if needed.

Changing the Date: Select the new date and confirm on the calendar that the time is available. Check the box for the new appointment time slot. Click **Save**. You can verify the move by checking the appointment center calendar for the new time slot.

Keep this in Mind…
When you select a different date on the calendar in the appointment center, you always need to click RELOAD so the calendar will update to the new date.

Changing/Adding Reasons: Most appointments made from the front desk will indicate one reason for an appointment. Additional reasons are often added to the report later by the advisor. However, if multiple reasons are provided at the time the appointment is made, those reasons can be selected. **Edit** the appointment after saving the date, time, and advisor (using the same process as above) and then select the additional reasons provided. Click in the box where the reasons are listed and a drop down will appear. Select all of the applicable reasons. **Save Appointment** to reflect the changes.

Student Self-Service Check In for a Scheduled Appointment Using Advising Kiosk Mode

Log in to CardSmart as usual and select **Advising Kiosk** from "Additional Modes" at the bottom right of the screen. A new kiosk window will open.

Appointment Center
Tutor Center
Advising Kiosk

Additional Modes ▾

Don't Forget

Once you have the kiosk up-and-running, be sure to close the other CardSmart window so that students only have access to the kiosk sign-in.

Select **your unit** and then **Multiple Purpose Mode.**

Kiosk Setup
Follow the steps provided to set up the kiosk mode at this location.

Choose the Location for this Kiosk

Cards Career Navigator Workshop Ekstrom Library W102

Arts & Sciences

Arts & Sciences - Exploratory

Choose the Kiosk Mode

Single Purpose Mode

Multiple Purpose Mode

You will see the Kiosk screen where students enter their ID numbers and then click **Submit**.

Once a student is signed in, they will be automatically signed out after 30 seconds of inactivity.

Please swipe your Student Card (or enter your ID):

Submit
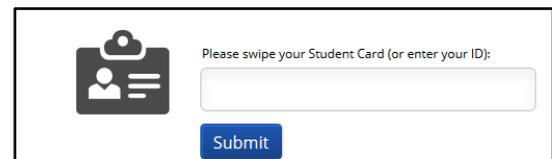
Students will be asked, "What would you like to do today?"
They can then select the reason for their appointment from the following list:

What would you like to do today?

| AA Career Planning |
| AA Co-Curricular |
| AA Degree Audit |
| AA External Transfer |
| AA Flight Plan Milestones |
| AA General Appt. Camp. |
| AA No Reason Specified |
| AA Student Success |
| Leave the Kiosk |

After students select a reason ("AA Degree Audit" for instance), they will select **Add yourself to the current waiting list**.

Add yourself to the current waiting list

Make an Appointment

NOTE:
If you do not want students to make appointments, you will need to include that in your instructions. We also suggest putting a sticky note to that effect on the computer screen.

Once students select to be added to the current waiting list, they will see the **list of advisors** who are available at that time. (This relates directly to the advisors' set availability and reasons for appointments.) They will also be able to choose **First Available Advisor**.

Select the advisor you want to visit:
Once an advisor is selected, you will be added to the waiting list and the advisor will be notified.

Other Advisors at this Location

Joseph Muscarella(0 waiting)
Current wait:none

Meagan West(0 waiting)
Current wait:none

Marissa Williams(0 waiting)
Current wait:none

First Available

First Available Advisor(0 waiting)
Current wait:none
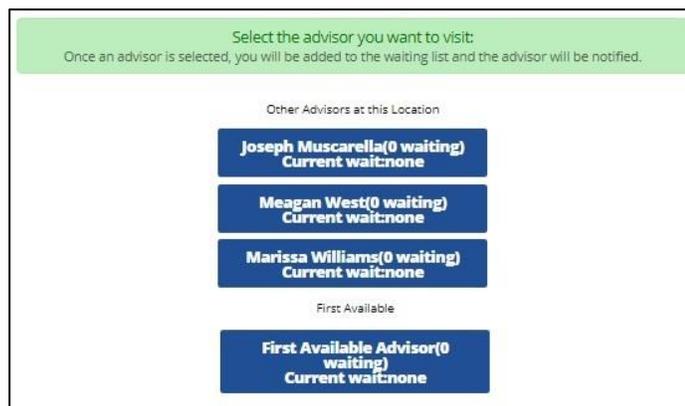
Once students make a choice, they receive the following options. They should select **I'm done. Exit the kiosk.** That's it from the student end.
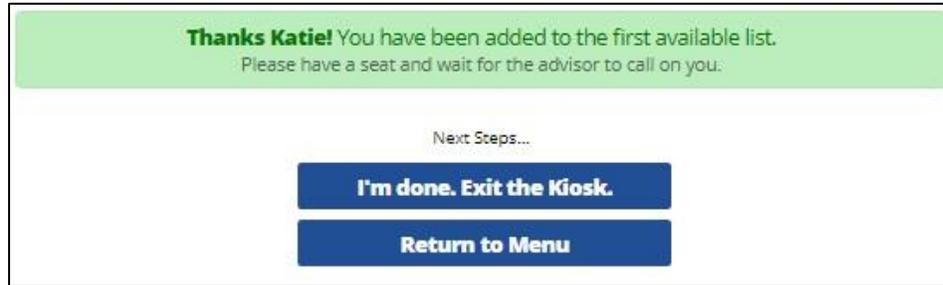
From your perspective as an advisor:

Once the student selects an advisor or first available, you will receive a notification and the student will appear in your queue.

Click on the icon and you will be able to see the name(s) of the student(s) in the queue and the current wait time. Click Start Appt once you are ready to begin with the student.
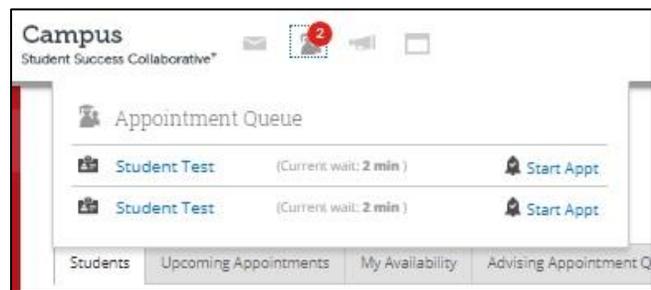

Clicking Start Appt opens the Advising Report.
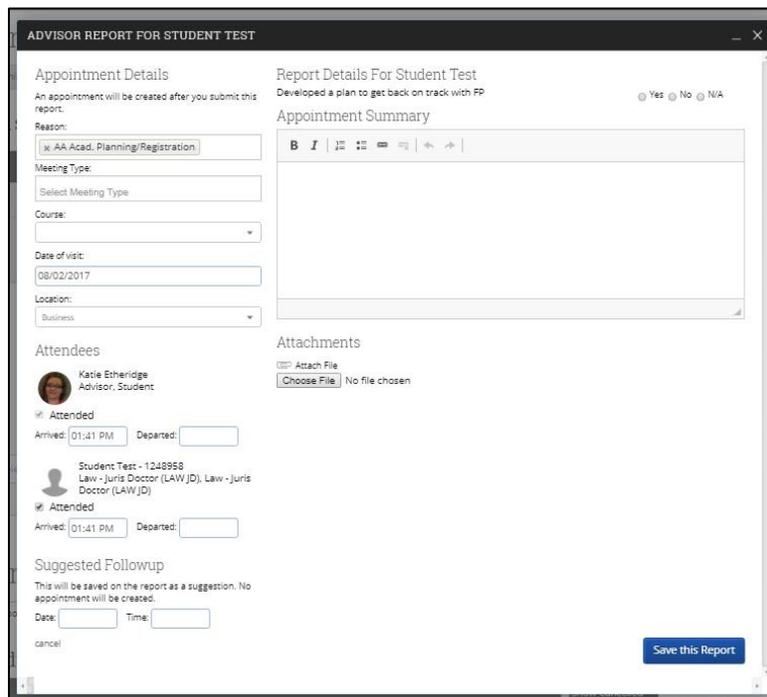
Student Self-Service Check In for Walk-In Using Advising Kiosk Mode

The kiosk will show the image to the right.
Enter your student ID and then click Submit.
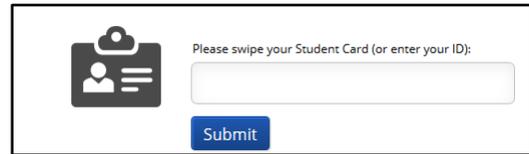
You will be asked, "What would you like to do today?" **Select the primary reason for your appointment**.
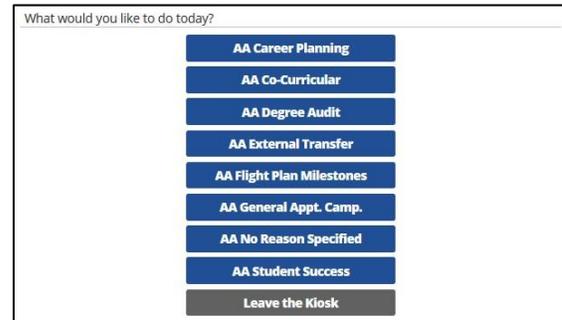
Once you have selected the reason, choose **Add yourself to the current waiting list**.
Do not select make an appointment.

Remember:

Choose only to add yourself to the current waiting list. DO NOT select "Make an Appointment."

Select either your preferred advisor, or you can choose to see the First Available Advisor.
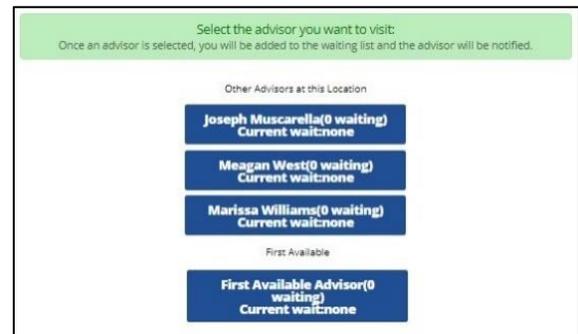
Select "**I'm done. Exit the kiosk.**"

Additional Features

Reminders

Reminders can be used when you want to check in on something later on, such as a particular student's grades, their enrolled courses, or to remind them to apply for something. On a student's profile, select **Add a Reminder to this Student** from the "Staff Alerts" box at the top left. Enter the Reminder note to yourself and set the due date for the time you would like to check back on something for the student.
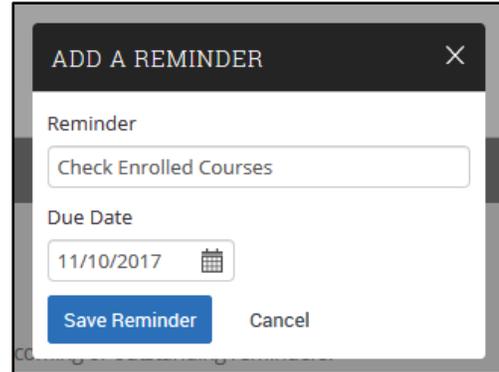
Once the Reminder is set, your reminders for that student will show up on their profile under the Reports/Notes tab. There is an overview of the next three Reminders you have scheduled on the right side of your Advisor Home page. To view all of your outstanding Reminders, select the **Reminders** icon from the toolbar at the left. You will not receive a notification when the Reminders' due dates are reached and overdue reminders will remain past their Due Date if not cleared using the Actions drop down.

Watch Lists

Watch Lists can be used to save a static group of particular students that you manually add and remove from the list. This could be helpful for cohorts of students within a major, students you want to monitor, or other groups not easily attainable from Advanced Searches. To create a Watch List, select the **Lists and Searches** icon from the toolbar at the left and click **New Watch List**. Once a Watch List is created, you can add individual or multiple students to it from most Actions drop downs found in various places on CardSmart. They can also be added to a Watch List from their student profile. The box of links in the top left of the student profile contains the option to **Add to Watch List**.

You can view another advisor's Watch List by going to their profile and clicking the drop down arrow next to **Assigned Students**. This can be helpful if collaborating on a campaign or needing to reach out to a group for another advisor.

Saved Searches

You can save a search created using Advanced Search to view a regularly updating list of students that meet the criteria you have entered. Saved Searches are different from Watch Lists in that they are not static lists and update as students fall in and out of the requested criteria, such as major or active enrollment. You are given the option to save a search after performing an Advanced Search.
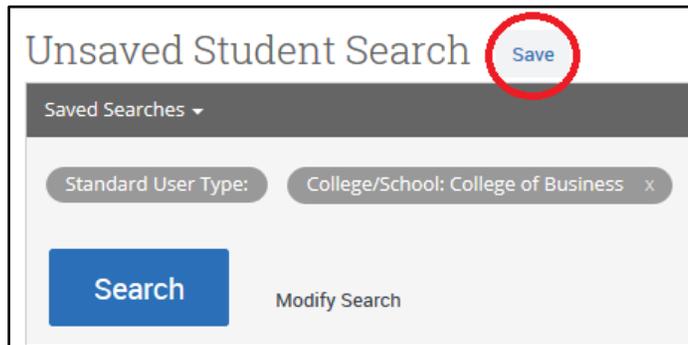
Name your Search according to the entered criteria and you can perform that same search in the future with updated results. You can find your Saved Searches under the Lists & Searches icon in the toolbar to the left.
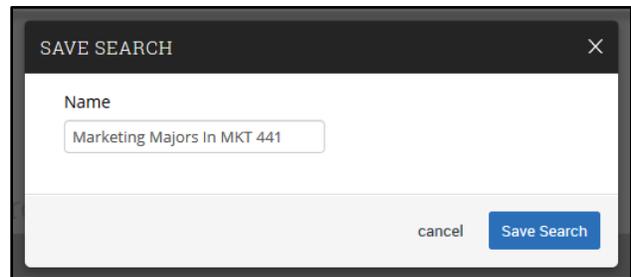

Just like Watch Lists, **Saved Searches** are not private. You can view another advisor's Saved Searches by going to their CardSmart profile and clicking the drop down arrow next to **Assigned Students**. Their Watch Lists and Saved Searches will display here and can be used to mass message another's advisors group if needed.

Creating a CardSmart User

Click the arrow to the right of your photo icon in the top right of the screen and then click "Admin Settings."
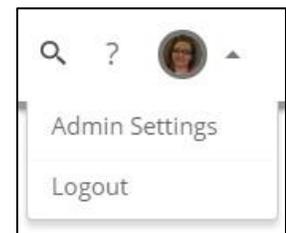
Click "Create a New User" in the "User Management" box.

Enter "Login Information" and "Contact Information" and "Profile Picture" (from Peoplesoft Student Photo) if applicable. In the "Roles" box, click the down arrow to expand the box. Select "Student." Select "Create User" at the bottom of the page when finished.

Add A New User

Login Information | Contact Information | Pro...

User Login
test01@louisville.edu

First Name
Test

Last Name
Student

Email Address
test01@louisville.edu

Primary ID
1251014

Alternate ID
test01

SSO ID

Personal Identification Number

Add A New User

Login Information | **Contact Information** | Pr...

Home Phone
555-555-5555

Cell Phone
111-111-1111

☑ Text messages can be sent to this user.

Work Phone [?]

☐ Enable email privacy protection. [?]

Add A New User

Login Information | Contact Information | **Profile Picture** | Student Information

[Profile picture goes here.]

Profile Picture [?]
Choose File No file chosen

Note: Photo must be at least 314px wide and will be cropped to 314px x 314px

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Add A New User

Login Information | Contact Information | Profile Picture | **Student Information**

Classification
Freshman ▼

Overall GPA

Term GPA

Study Hall Required
____ Hours

Study Hall Required
____ Minutes

Race

Gender
Unspecified ▼

Roles

A role provides a user with a default set of permissions based on their function(s).

☐ Administration (Contact support@gradesfirst.com before modifying)
☐ Advisor_ACA
☐ Career Coach
☐ Coach
☐ EAB_Advising_Center_Director
☐ EAB_Advising_Faculty
☐ EAB_Advising_Peer
☐ EAB_Advising_Professional
☐ EAB_Career_Advisor
☐ EAB_Career_Coordinator
☐ EAB_Career_Director
☐ EAB_Frontdesk_Advisor
☐ EAB_Frontdesk_Low_Access
☐ EAB_Institution_Admin
☐ EAB_Support_Staff_Advisor
☐ EAB_Support_Staff_Coordinator
☐ EAB_Support_Staff_Director
☐ EAB_Tutor_Coordinator
☐ EAB_Tutor_Director
☐ Facility Administrator
☐ Peer Mentor
☐ Professor
☑ Student ⬅
☐ Student Appointment_ACA

Create User

Creating a Profile for a Prospective Student

Click the down arrow to the right of your photo icon in the top right of your screen and click **Admin Settings**.

Click on **Create a New User**. It is the first option in the "User Management" box.

Use the following format to assign the user ID.
   a. Start with the number "9."
   b. Enter the last two digits of the current year. For 2018, you would enter "18."
   c. Enter the first letter of the student's first name.
   d. Enter the first four letters of the student's last name.
   e. Using this formula, Test Student's user name would be "918tstud."
   f. If another prospective student arrives in the same year with the same initials, append a number beginning with number 1. For example, Tyler Studebacher's ID would be "918tstud1." Tanya Studbury's ID would be "918tstud2" and so on.

Enter **Login Information** and **Contact Information**. In the "Roles" box, click the down arrow to expand the box. Select "Student." Select **Create User** at the bottom of the page when finished.

Instructors: Filing a Progress Report in CardSmart

Progress report campaigns allow instructors the opportunity to provide feedback about students who need assistance or are at-risk. Follow the steps below to file a progress report.

Email Notification: You will receive an email asking you to enter feedback for students in your class. The email includes a direct link to the progress report where you will enter your feedback. The link expires on the date listed in the email. After that date, the campaign is over, and you will no longer be able to provide information for the student(s). **Click to Begin Entering Student Feedback**.
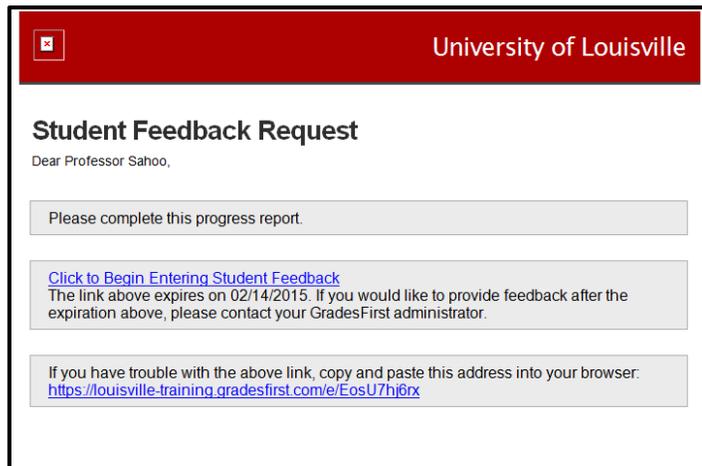
Entering Student Feedback: When providing feedback, include as much information as possible, especially in your comments. You will see five potential alert reasons listed. Reasons provided include: <u>attendance</u>, <u>difficulty understanding content</u>, <u>failure to submit assignments</u>, <u>poor test results</u>, and/or <u>poor written communication</u>. Select all that apply. (Note: to select more than one reason, hold the shift button while clicking the reason.) Use the comment section to provide additional feedback or suggested course of action.
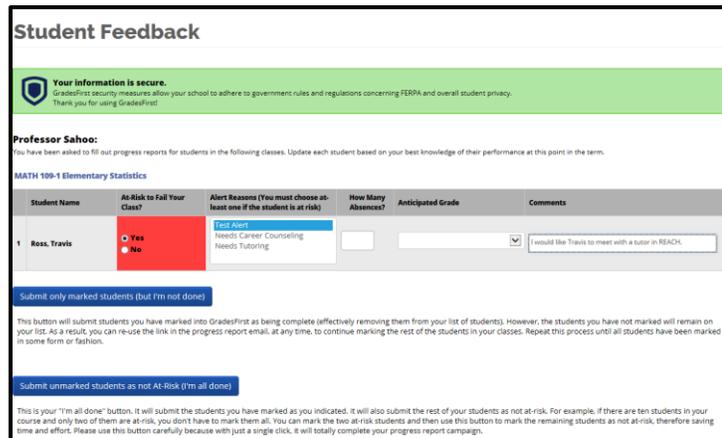

**Submitting Feedback**. You have two options at this point.

a. **Submit only marked students (but I'm not done)**: This option allows you to submit only the students you have marked on the report. This can be very helpful if you only have time to fill out part of the feedback form. Instead of leaving the form pulled up on your computer, you can submit your completed work and return and finish later by clicking the link in the request notification email.

Submit only marked students (but I'm not done)

This button will submit students you have marked into GradesFirst as being complete (effectively removing them from your list of students). However, the students you have not marked will remain on your list. As a result, you can re-use the link in the progress report email, at any time, to continue marking the rest of the students in your classes. Repeat this process until all students have been marked in some form or fashion.

b. **Submit unmarked students as not at-risk (I'm all done)**: After you have entered all our feedback and marked certain students at-risk, you can use this option to mark the remaining students as not at-risk and complete your feedback.

Submit unmarked students as not At-Risk (I'm all done)

This is your "I'm all done" button. It will submit the students you have marked as you indicated. It will also submit the rest of your students as not at-risk. For example, if there are ten students in your course and only two of them are at-risk, you don't have to mark them all. You can mark the two at-risk students and then use this button to mark the remaining students as not at-risk, therefore saving time and effort. Please use this button carefully because with just a single click, it will totally complete your progress report campaign.

Confirmation. Once you have submitted your feedback, you will receive a message similar to the one below.

STUDENT FEEDBACK

Your information is secure.
GradesFirst security measures allow your school to adhere to government rules and regulations concerning FERPA and overall student privacy.
Thank you for using GradesFirst!

Professor Gladney:
You have been asked to fill out progress reports for students in the following classes. Update each student based on your best knowledge of their performance at this point in the term.

You successfully completed your Student Feedback.
You have no more student feedback to complete at this time. Thank you! If you feel that you have received this note in error, please contact the person that sent the original request for student feedback.

Sending a Progress Report Campaign

CardSmart Progress Report Campaigns allow you to gather feedback from faculty to help determine which students may need intervention.

Click on the **Campaigns** tab. Then click to **Create New** Progress Report Campaign.

| Home | Calendar | Conversations | Campaigns | Tutors |

Create New

↗ Progress Report Campaign

⬆ Enrollment Census Campaign

Name your Progress Report Campaign and write a message to the professors. When finished, click **Save and Next: Choose Students**.

Choose Students. You can select all students, a subset of students, or certain classes that are to be monitored. Most often, you will select a specific group of students. Once you do that, the search box will open. Select **Switch to Advanced Search** so that you may filter either by **student** or by **course section**. .. When finished, click **Define Behavior**.

Define Behavior. Define how your Progress Reports will behave with thank you notes and expiration dates. **Exclude Students Requested Since**: This prevents new student request from being sent to professors who have already received a request since the date you provide. **Expire Professor Links On**: This sets a deadline by which the professor will no longer be able to respond. You can select to have a thank-you note sent to the instructor upon completion of the progress report.

Send and Complete. This final screen summarizes the information you have provided, detailing how many requests will be sent to professors (and for how many students.) You can review the list to be sure it's accurate. The final step is to select **Send & Complete**.

Based on your student selection(s), GradesFirst will send 0 evaluation requests for 0 students in 0 sections to 0 professors. Below is a list of all the evaluation requests that will be sent. Please review this list to ensure all desired students and courses are included.

EVALUATION REQUESTS TO BE SENT

STUDENT	ID	PROFESSOR	COURSE	COURSE NAME	SECTION
No students matching campaign student criteria.					

You **have not** selected to send a follow up thank you E-mail to professors.

Back : Define Behavior   Next : Send & Complete

Enrollment History Feature in Advanced Search

Select the magnifying glass on the left-hand menu bar to open the "Advanced Search" feature.
Select the check box next to "Show Advanced Filters."
Select "Enrollment History" in the third row.
Click on the "+" at the bottom of the "Enrollment Terms" box:

Enrollment History Enrollment Terms

Enrollment Terms (In Any of these)?

All
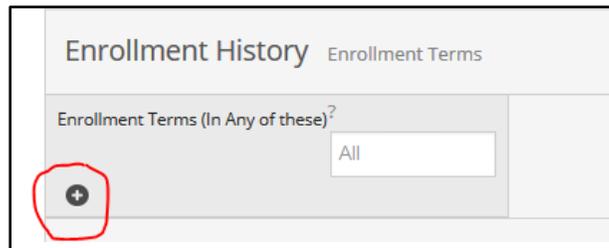
You will see two additional boxes appear:

Enrollment History Enrollment Terms

Enrollment Terms (In Any of these)?   Enrollment Terms (In All of these)?   Enrollment Terms (In None of these)?

All   All   All
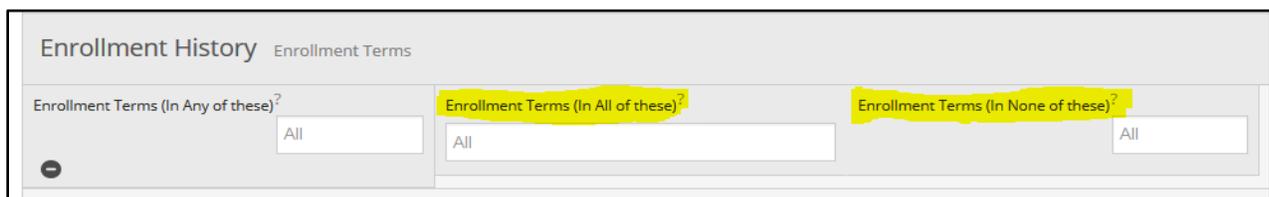
With these additional features, <u>you can search for students who are/were enrolled in either of the terms identified, but not another:</u>

Enrollment History Enrollment Terms

Enrollment Terms (In Any of these)?   Enrollment Terms (In All of these)?   Enrollment Terms (In None of these)?

x Spring 2016   All   x Fall 2016
x Fall 2015
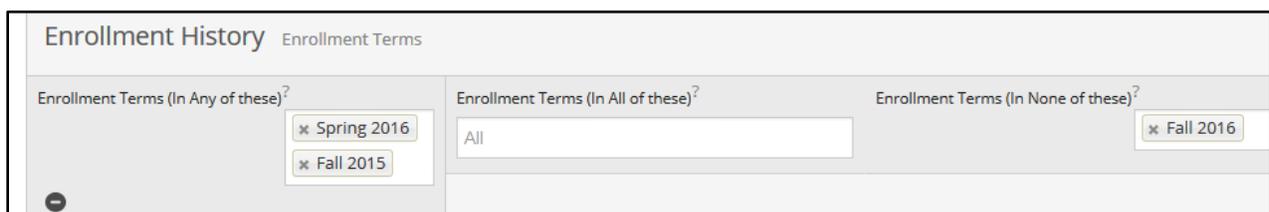
You can also search for students who are/were enrolled in ALL of the terms identified, but not another:

Additional Resources

- EAB Profile: To use EAB resources like training and the Daily Briefing, create a profile here: https://www.eab.com/members/register
- EAB Daily Briefing: This includes articles relating to higher education, trends, technology, recent events, research, and more. It includes infographics on things like tips for first generation students, effective email communication, steps to recruiting students and the admission process, etc. You can sign up to receive these via email after creating a profile or bookmark the webpage here: https://www.eab.com/daily-briefing