NDSU SSC Training Guide

Student Success Collaborative

Uniting technology, predictive analytics and advising excellence to boost student retention and success

North Dakota State University is committed to giving every student the opportunity to experience academic success and graduate on time. NDSU is partnering with the Education Advisory Board to launch Student Success Collaborative Campus, an advising platform that unites technology, predictive analytics and advising excellence to boost student retention and success.

The Student Success Collaborative will assist with identifying students in need of intervention and creating targeted campaigns to connect them with resources that will keep them moving toward graduation. Students will be able to use the platform to schedule appointments with their advisors or seek out other student service professionals. Advisors can use the platform to document and share information from interactions with students to promote seamless service.

Advisors can use the platform to:

- Save time by viewing important student information from multiple Campus Connection sources in one place, with a user-friendly interface
- View a snapshot of critical student information before or during advising appointments
- View a student’s level of risk within a declared major based on historical institutional data
- Use custom search criteria to generate student lists and conduct proactive outreach
- View semester-by-semester trends in student GPA and credit accumulation
- Use the notes feature to track interactions with students, including referrals to appropriate campus resources

Training Objectives and Handouts:

1. Navigate at-a-glance tabs
2. Understand predicted risk and success markers
3. Use advanced searches
4. Use advising reports and notes
5. Use SSC’s scheduling functions
Menu bar allows you to show/hide titles for each icon. Each area has a detailed resource handout for more detailed information.

Home consists of two areas: Advisor Home includes links for students, upcoming appointments, your availability, and your advising center. Advisor Reporting near the bottom of your screen includes recent advisor appointments and reports you created.

Conversations is a list of all messages sent and received via SSC.

Calendar shows your appointments. If you choose to, the calendar link to your Outlook calendar and show busy times.

Campaigns a way to conduct targeted outreach and track outreach effort.

Reminders is a list of upcoming and overdue reminders you have added for various students.

Advanced Search allows you to search for students, faculty, advisors and others with many custom search filters.

Lists and Searches consists of Watch Lists and Saved Searches that you have created from advanced search.

Analytics consists of four options: Advising Activity, Tutoring Activity, Student Reports, and Institutional Reports.

Institution Reports shows reports for institutional data such as graduation rates, courses and major changes.

Reports allows advisors to run analytics on various information housed within the platform such as advising interactions by appointment reason or cancellations.

Where to go for help with SSC:

Questions About Logging In:
NDSU Help Desk
701-231-8685 Opt. 1
ndsu.helpdesk@ndsu.edu

SSC Features and Functionality:

SSC Help Center – once logged in, choose the ? at the top right of page and search keywords of topic you are interested

NDSU SSC Web Site:
https://www.ndsu.edu/enrollmentmanagement/studentsuccess/resources/

Contact NDSU SSC Super Users:
https://www.ndsu.edu/enrollmentmanagement/studentsuccess/about/campus_engagement_teams/#tc430531
1. Student Profile: At-A-Glance Tabs

The student profile contains information about the student and their academic performance. The information available helps to proactively identify students at risk of not graduating in their major. Advisors can gather a great deal of information as they move along the information tabs.

- Important academic information in a quick and easy-to-access format
- Allows for more in-depth conversations during advising appointment

**Student View slider** – when sharing screen with student, turn the “Student View” on

**Overview:** You can learn a great deal about the student prior to their arrival to your appointment in 30 seconds – EAB calls this the 30 second gut check. Jot down notes about the datapoints on the student profile that you can use to prepare for advising appointments and learn more about your students’ success and progress.

**Success Progress:** The Success Progress tab details the success markers the student has completed, missed, or that are upcoming. Success Markers are important courses in a student’s major that indicates their progress toward success in that major. There are also charts to visually see GPA and credit trends along with a table of the data points.

**History:** This page shows any reminders you may have set to follow up with the student on as well as the various appointments the student has had with you or other advisors and offices on campus and any notes or reports filed.

**Class Info:** The class info tab has information that you likely would have looked for in Campus Connection. The classes that the student is currently enrolled in as well as the transcript information for the student that shows semester by semester enrollment. The bottom of the page shows the students’ ACT scores and any other placement exam score information.

**Major Explorer:** Additional majors at NDSU that based on risk score, students have shown previous success in earning their degree.

**More:** Calendar, appointments, conversations

**Categories:** Information brought in from the Student Information System to better help you identify your students for outreach, interests, and advising

The student profile page also displays the current major for the student, any second majors, the student ID and contact information, as well as their current academic classification and term of most recent enrollment.

**Practice:** Because you may have your own approach and needs, jot a few notes about how you can use information in the at-a-glance tabs to advise your students.

**Notes:**
2. Predicted Risk Level

A predicted risk level suggests the likelihood of a student graduating in their current major (for undecided students the risk predicts the likelihood of them graduating from any major).

- Quickly identify at-risk students
- Prioritize advisor and staff interactions with students

<table>
<thead>
<tr>
<th>Low (green)</th>
<th>means a student is at low risk for NOT graduating from NDSU.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moderate (yellow)</td>
<td>means a student is at moderate risk for NOT graduating from NDSU.</td>
</tr>
<tr>
<td>High (red)</td>
<td>means a student is at high risk for NOT graduating from NDSU.</td>
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</tbody>
</table>

**Student View:** Click student view when sharing your screen with students, and Risk disappears

**How is risk level derived?**

- Historical NDSU student academic and demographic data used for advanced statistical modeling
- Risk level shows how students with attributes like yours did in past semesters

**How can advisors use predicted risk level?**

1. **Uncover hidden risk:** Example - A student with a 2.75 GPA may be in good academic standing, but be at risk due to low credit completion or a high number of withdrawn courses.
2. **Intervene early with at-risk students:** Using the advanced search filter, search for all moderate or high-risk students in a particular major and invite them to a meeting prior to advising week.
3. **Guide conversations with students:** Use the student profile to understand important aspects of their academic performance.
4. **Direct students to services to supplement their skills:** ACE Tutoring, The Writing Center, etc.
5. **Explore majors:** Use the major explore tab to talk about the student’s choice of major and its alignment with skills and interests.

**REMEMBER: THE PREDICTED RISK LEVEL IS A PREDICTION, BUT DOES NOT GUARANTEE SUCCESS OR FAILURE.**

**Practice:** Review two or three of your advisees with different levels of risk. Can you identify what may be contributing to their risk score? How might you use this information while advising them?

**Notes:**
3. Advanced Search

SSC stores historical (back to Fall 2005) and current NDSU student data and provides an easy way to apply multiple filters to query desired information at your fingertips. You can locate information that in the past may have taken a formal data request.

1. Select the “Show Advanced Filters” box in upper right corner to see additional search fields.
2. **Enrollment Term** – indicates the term’s data you are searching by.
3. **My Students Only** – search parameters will only return students that are assigned to you as their advisor
4. **Include Inactive** – the search defaults to only include students active in the term in which you are searching. If you select “Include Inactive” you will then include students from past terms as well
5. Search and view your list of students that matched your parameters
6. From the list, you may: take action – sending email or scheduling appointments or save your search or export your results to Excel and work offline with the list.

You may save two types of lists of students:

1. **Saved Search** – allows you to quickly re-run the list with the parameters you previously set. This saves the parameters of the search that you set, not the list of students that were returned when you ran the original search. Students on this list may change as their student data changes – If a student changes major or advisor, they may no longer appear on your list.

2. **Watch List** – allows you to save a list of students based on your original search parameters, not the search parameters themselves. A watch list is a list of students that you want to continually monitor over time.

**Practice:** Create one advanced search with your students that is of interest to you.

**Example:** Find all currently enrolled students assigned to you with 3.5 cumulative GPA and above.
- Select Show Advanced Filters
- In “Performance Data” area – enter 3.5 as Min Cumulative GPA
- Select “My Students Only” near the search button
- Search

**Notes:**
4. Advising Reports and Notes

“Advising Reports” and “Notes” allow faculty and staff to create, store, and share academic information about a student. Notes are accessible across campus by the advised student, advisors, and student support staff. Benefits to widely accessible notes include improved communication, coordination, efficiency, transparency, and a more personalized student experience in advising.

Benefits of shared notes:
- Help students remember advice they received during advising appointments
- Help advisors and other student support staff communicate and provide consistent, coordinated service
- Create an “institutional memory” of contacts and recommended actions
- Personalize the advising experience by refreshing the advisor’s recollection of previous conversations

<table>
<thead>
<tr>
<th>Advising Reports</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track details about advising appointments</td>
<td>Track general information not related to a specific advising appointment</td>
</tr>
<tr>
<td>Track patterns in advising appointments</td>
<td>Log student contacts, referrals, student reminders, and misc. information that may be important to share with other campus professionals</td>
</tr>
<tr>
<td>Upload documents (e.g., curriculum guide, letter of recommendation, etc.)</td>
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</tr>
<tr>
<td>Accessible to the student, advisors, faculty, and student support staff</td>
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</tr>
</tbody>
</table>

The Family Educational Rights and Privacy Act (FERPA) entitles students to access any notes considered part of their academic record. Any notes completed in the Student Success Collaborative (SSC) advising platform are considered part of a student’s academic record and are accessible by students, open records requests, and court subpoenas. This applies to notes whether they are designated as shared with students in the platform or

☑ Assume students, parents, or the general public will read anything and everything you have written.

Practice: Take a moment to jot down some ideas about what information would be most useful to you and your students to include in advising reports and notes.
Advising Notes: Best Practices
Student Success Collaborative (SSC)

The SSC advising platform allows for an integrated campus-wide advising notes system. Rather than have each advising or student support office keep independent notes, SSC advising reports will be accessible across campus by students, advisors, and student support staff. Benefits to widely accessible notes include improved communication, coordination, efficiency, transparency, and a more personalized student experience in advising.

Why take advising notes?
- Help students remember advice they received during advising appointments
- Help advisors and other student support staff communicate and provide consistent service
- Create an “institutional memory” of contacts and recommended actions
- Personalize the advising experience by refreshing the advisor’s recollection of previous conversations

The content of advising notes aims to communicate:
- What was the student seeking help with?
- What steps were taken to address the student’s concerns?
- What advice and recommendations were made?
- What are agreed upon follow-up actions? Were specific referrals made?
- Overall, summarize what you discussed as it relates to the student’s academic success.

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With this in mind:
- Assume students, parents, or the general public will read anything and everything you have written.
- When writing your notes, ask yourself the following questions:
  1) Is this something the student would want other people to know?
  2) Is this something another advisor would need to know? Why?
  3) Is this something that is within my scope of practice to say? (i.e., Do I have the necessary training, and is this something germane to my area of professional expertise?)
  4) Are the details in my notes based on fact?

  Or,

  Do they merely represent my own observations, perspectives, guesses, predictions, diagnoses, etc.?

  “Describe, don’t evaluate”
  “When in doubt, leave it out”

- Notes should be academic-related and avoid including personal, potentially sensitive content.
- Personal and/or sensitive content, whether reported by the student or assumed by you, may include:
  - Medical / mental health concerns
  - Legal problems
  - Relationship problems
  - Family concerns
  - Conflicts with specific instructors

Portions are summarized or directly adapted from Adopting a Campus-Wide Student Notes System. www.eab.com
Advising Connect: Note-Taking and Other Documentation in Advising Connect. www.educationpartnershipsfiles/201404/NoteTaking14Doc7.doc
# Academic Advising Notes Do's and Don'ts

<table>
<thead>
<tr>
<th>Do</th>
<th>Don't</th>
</tr>
</thead>
<tbody>
<tr>
<td>Briefly summarize what was discussed as it relates to student success for future reference by the student, other support staff, and future advisors:</td>
<td>Summarize <em>everything</em> that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals, and follow-up plans.</td>
</tr>
<tr>
<td>• Recommendations: &quot;Recommended student take MATH 105 because of her interest in Engineering.&quot;</td>
<td>• Include unnecessary details: &quot;She said she has been having a good week and is especially excited about moving into a different apartment.&quot;</td>
</tr>
<tr>
<td>• Advice: &quot;Cautioned against taking 18 credits this semester given work schedule.&quot;</td>
<td>• Include personal/sensitive information: See examples below</td>
</tr>
<tr>
<td>• Referrals: &quot;Referred to Career Services.&quot;</td>
<td>• Include subjective opinions: See examples below</td>
</tr>
<tr>
<td>• Action Plans: &quot;Student plans to follow up with ACE Tutoring and schedule an appointment with me after mid-terms.&quot;</td>
<td></td>
</tr>
<tr>
<td>Summarize specific course recommendations</td>
<td>Report problems with specific instructors</td>
</tr>
<tr>
<td>• &quot;Encouraged student to take HIST 103 as a gen ed.&quot;</td>
<td>• &quot;Student doesn't like his MATH 103 instructor.&quot;</td>
</tr>
<tr>
<td>• &quot;Recommended student take BIOL 150 fall semester 2016.&quot;</td>
<td>• &quot;Student said PSYC 111 professor has unfair grading policies.&quot;</td>
</tr>
<tr>
<td>Spell things out for a general audience</td>
<td>Use acronyms students and other campus support staff may not understand</td>
</tr>
<tr>
<td>Write fact-based academic-related notes</td>
<td>Include speculation, subjective opinions, or judgements</td>
</tr>
<tr>
<td>• &quot;Student is concerned about grades in two courses.&quot;</td>
<td>• &quot;I don't think she is very motivated this semester.&quot;</td>
</tr>
<tr>
<td>• &quot;Student is considering whether his current major is a good fit. Helped him consider other options.&quot;</td>
<td>• &quot;His personality isn't a good fit for STEM fields. I think he'd feel more at home doing something artistic or creative.&quot;</td>
</tr>
<tr>
<td>• &quot;Student needs to complete BIOL 220 before she can apply for the Nursing Program.&quot;</td>
<td>• &quot;She has probably been avoiding BIOL 220 because she struggled with BIOL 150.&quot;</td>
</tr>
<tr>
<td>Use general or coded language concerning sensitive material</td>
<td>Include sensitive information, personal concerns, private matters</td>
</tr>
<tr>
<td>• &quot;Student reported extenuating circumstances related to his academic progress this semester.&quot;</td>
<td>• &quot;Student's parents are going through a divorce.&quot;</td>
</tr>
<tr>
<td>• &quot;She discussed a difficult situation and requested help from a campus support service.&quot;</td>
<td>• &quot;She reported she was assaulted by her boyfriend earlier this year.&quot;</td>
</tr>
<tr>
<td>• &quot;Student disclosed a personal situation that's having an impact on how things are going this semester.&quot;</td>
<td>• &quot;Student was recently diagnosed with an autoimmune disorder.&quot;</td>
</tr>
<tr>
<td>Record referrals made</td>
<td>Report details surrounding sensitive referrals</td>
</tr>
<tr>
<td>• &quot;Referred student to Counseling Center.&quot;</td>
<td>• &quot;He said he can't concentrate because of relationship problems with his girlfriend. I referred him to the Counseling Center.&quot;</td>
</tr>
<tr>
<td>• &quot;Referred to Student Health Service.&quot;</td>
<td>• &quot;He said he's been having a lot of headaches lately. I'm concerned something more serious may be going on. I suggested he go to Student Health Service to get it checked out.&quot;</td>
</tr>
<tr>
<td>• &quot;Referred to Financial Aid Office.&quot;</td>
<td>• &quot;Little financial support from family. First Generation student with significant debt building up&quot;</td>
</tr>
<tr>
<td>• &quot;Referred to Disability Services.&quot;</td>
<td>• &quot;Student reported having a lot of test anxiety.&quot;</td>
</tr>
<tr>
<td>Include notes about positive student behaviors</td>
<td>Include notes about negative student behaviors</td>
</tr>
<tr>
<td>• &quot;Student came prepared for session with course plan filled out.&quot;</td>
<td>• &quot;She seems like she just blows off advising appointments. I can't get her to be serious and plan ahead.&quot;</td>
</tr>
<tr>
<td>• &quot;He has spent time talking with two Sociology professors to learn more about potentially changing to that major.&quot;</td>
<td>• &quot;He seems pretty uninformed about the real world after college and hasn't followed through with plans to get information from his Sociology professor. I think he needs to be more realistic.&quot;</td>
</tr>
<tr>
<td>Attach important emails</td>
<td>Attach emails with sensitive/private content that the student likely didn't intend for other campus providers to read</td>
</tr>
</tbody>
</table>
5. Setting Availability and Scheduling

SSC allows advisors to open up available times for student appointments or drop-in hours. This is done by setting your availability for the majors you advise. Students are then able to search for the major in which they want to see an advisor and make an appointment. Outlook syncs with SSC to provide additional time management functionality.

- Advisor controls their calendar availability
- Eliminates back and forth of email or paper sign-ups for scheduling
- Increases advisor availability and accessibility to support students
- Provides consistent method of scheduling for students, regardless of major or advising model

**Setting Availability**

1. My Availability tab
2. Edit Appointment Constraints first time in platform (leave “Require available times for students checked)
3. Actions drop down arrow – add time
   a. Choose days, times, drop-ins or appointments, date duration
   b. Location = Major
   c. Student Services = Advising for My Major or Explore a New Major/Minor
   d. Details: LIST YOUR OFFICE LOCATION and other important information for students
   e. Repeat via add new or copy for additional majors you advise

**Sync Your Outlook Calendar**

1. Grant Delegate Access to EAB Account for Calendar Sync:
   a. Log into Online Web Access (OWA) at [https://login.microsoftonline.com](https://login.microsoftonline.com)
   b. Select Calendar from the Office 365 app menu
   c. Right click your calendar under My Calendars and click Share
   d. Type ndsu.eab.integration@ndsu.edu in the Share with: field
   e. Select Editor from the permissions drop down menu
   f. Click Send at the top of the share window
2. Setup Exchange Calendar Integration in SSC
   a. Log into SSC at [https://ndsu.campus.eab.com](https://ndsu.campus.eab.com)
   b. Click the Calendar icon from the left menu
   c. Click the Subscriptions tab under My Calendar
   d. Click the Setup Exchange Calendar Integration option
   e. Verify the Exchange Mailbox field is filled in with your email address
   f. Click the Connect with Exchange button (Note: this may take a few minutes depending on the size of the calendar)

*At this time, appointments denoted as “Private” in Outlook do not sync to SSC, so if those times are during your availability, you would need to manually block those in SSC.

**Schedule an Appointment with Student (For Advisor) Demo**

**Scheduling Decision Tree (For Students) Demo**
Practice:  Sync your Outlook calendar with SSC and set the availability of your office hours or advising week. (Advising for Spring Semester begins October 24).

Notes: