Welcome to LoboAchieve

LoboAchieve is designed to increase college retention through better communication among students, faculty, and staff. It is an early warning and student tracking system as well as communication and scheduling system. It gives you a convenient way to keep track of your students – raising flags when you observe a pattern of behavior that concerns you, ensuring that the people on campus who can intervene are aware.

Getting started is easy. Accessible through Learn, LoboAchieve will automatically display all students that have been assigned to you or are enrolled in your courses. From there, you can raise flags about students, review flags that have been raised about your students, and provide additional information.

Navigating to LoboAchieve

Log into learn.unm.edu. You will find the LoboAchieve link on your home screen. This link will take you directly into the LoboAchieve module.

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Navigation

Tabs
The tabs are located at the top of the LoboAchieve window. Tabs will vary according to your assigned system roles. Select a tab that corresponds to the function you want to perform. For example, if you want to set office hours, you should click on the Appointments tab.

Home   Appointments   Students

Staff members may have access to the following tabs:

- **Home** – Allows you to Add Office Hours, Add Appointment, Add Group Session, Access the Scheduling Wizard, and View Services. You can also view upcoming appointments and view recent changes.
- **Appointments** – Allow you to Add Office Hours, Add Appointment, Add Group Session, Reserve Time as well as access the Scheduling Wizard. You can also view upcoming appointments as well as view the office hours you set.
- **Students** – Here you can access student information, flag students, refer students to support services, give out kudos, add notes, and email students. You can also view flags and any other tracking items added for students.
- **Success Network** – Provides information for various areas that provide services to students at the College.

Setup Your Profile
The Staff member’s profile is visible to students and other users who have permissions to make appointments with the staff member.

Some of your profile, such as your UNM email, is already in LoboAchieve. Other parts of your profile, such as your cell phone number, can be entered by you.
1. Click the Advisor Lobo (YOUR NAME) link in the LoboAchieve navigation at the top of every page.

2. Enter a phone number and/or cell phone number, if you wish to share them.

3. You may enter an alternative address in the “Preferred Email” field. Select the address(es) where LoboAchieve should send email and calendar events.

4. Upload your photo to help a student put a face to your name.
   a. Select the Upload Photo link.
   b. Browse for a photo on your desktop. Recommended file formats are JPEG, GIF, and PNG.
   c. Click the Upload Now button.

5. Complete the General Overview and My Biography sections.

6. Click the Save button.

Staff members can customize their appointment preferences from the system defaults. To customize appointment preferences:
1. Click the Advisor Lobo (YOUR NAME) link in the LoboAchieve navigation at the top of every page.
2. Select the Appointment Preferences tab.
3. Select the minimum appointment length. 15 minutes is the default setting.
4. Specify a scheduling deadline, which determines whether students must make appointments by a certain number of days or hours prior to your office hours.
5. If a scheduling deadline is specified, select whether students are allowed to drop-in during office hours if the deadline has passed.
6. Add locations for office hours. For each location, select the type of location – in person, phone, online, or elsewhere – and add details about the location (e.g., an office number or phone number).
   a. Click the Add Location button.
   b. Select the type of location from the drop-down list.
   c. Give the location a name, for example the address of your office.
   d. If you choose to, you can enter additional information in the Instructions field.
   e. Click the Save button.
   f. Click the OK button.
7. The Calendar Manager enables people other than you to add and edit your office hours and schedule and edit appointments in your calendar. The button for adding a Calendar Manager is at the bottom of the page.
a. You can add a Calendar Manager by either clicking the drop-down button and search for the person or you can enter the person’s name in the Add Calendar Manager field.

b. Click the Add button.

8. Select Save to save changes made to the staff member’s appointment preferences. Select Never Mind to cancel the changes.

9. Click the OK button.

Set Email Preferences

1. Click the Email Notifications link from the navigation menu at the top of the page.

2. From the Email Notifications page you can set your preferences for if/when you want to be notified of appointments by selecting an option under Planning Reminders.

3. To receive iCal attachments, make sure the check boxes to send an email with a calendar attachment for every change to your appointments and change to your office hours/group sessions are selected. As you can see, however, in order for those selections to take effect, you must share your calendar with sfo365uc@unm.edu.

4. To save your appointment notifications, click the Save button.

5. From this page you can also set your preferences for when you will receive notifications regarding tracking items for your students. The Tracking Item Notifications are at the bottom of the page. Scroll to the bottom of the page to set these.

6. To receive a weekly report summarizing that week’s tracking activity for all your students, click the Weekly on check box.

7. In addition to those weekly summary reports, you can also be notified by email whenever a tracking item is raised for one of your students by clicking the Send me an immediate email whenever an item is raised check box.

8. To save your tracking item notification preferences, click the Save button.

9. Click the OK button.
Staff Dashboard

The staff dashboard is displayed on the LoboAchieve Home page. The staff dashboard displays summary information that staff members may find valuable, including:

- Upcoming appointments
- Recent changes

It also displays Office Hours-related system announcements, and links to Add Office Hours and Add Appointments.

The **Upcoming Appointments** channel displays appointments that have been scheduled with the calendar owner. Appointments can be filtered by date range. Specifically, the calendar owner can view appointments for any of the following date ranges:

- Today
- 3 days
- 7 days
To filter by date, select the appropriate date range from the View menu in the header of the Upcoming Appointments channel.

For each appointment, the following information is displayed:

- **Student name**: Click on this link to view the student’s profile
- **Date and time of the appointment**: Click on the time to view the appointment in the calendar
- **Reason for the appointment**

### Recent Changes

The **Recent Changes** channel displays details about recent actions related to appointments in Office Hours. The following types of data are displayed in this channel:

- Scheduled appointments
- Cancelled appointments

For each item listed in the Recent Changes channel, click on the student’s name to view the student profile. Recently scheduled or cancelled appointment also display the date and time of the appointment. Click the time link to view the appointment date in the calendar.

The Recent Changes list can be filtered by date range, specifically the following dates:

- Today
- 3 days
- 7 days
- 15 days
- 30 days

To filter by date, select the appropriate date range from the View menu in the header of the Recent Changes channel.

### Appointments

Students can make appointments with advisors and other calendar owners during scheduled office hour blocks. Advisors can schedule appointments with students during their set of office hour blocks or at any other time.
Set up Office Hours

1. To begin setting up your office hours, click the **Appointments** button.
2. Click the **Add Office Hours** button.
3. You should give the block of office hours you are creating a name. Click in the **Title** field and enter a title for the block of office hours.
4. Indicate what day(s) of the week this block occurs.
5. Enter the time your office hours start.
6. Enter the time your office hours end.
7. If you set your **Appointment Preferences**, the location for where your office hours are held automatically populates along with any instructions you entered for your location. In addition, what you selected for the minimum appointment length under **Appointment Preferences** will also automatically populate (see the quick reference on **Setting Your Appointment Preferences**).
8. Click the **maximum length** for your appointments.
9. Select the **appointment type** for your appointments.
10. To enter any special instructions that will be sent to anyone who makes an appointment, click in the **These will be sent to anyone who makes an appointment** field and enter your instructions.
11. In order to specify when this particular office hours block begins and ends, click the **Start/End Date** tab.
12. Click the **Ends** drop-down button.
13. Click the appropriate option for when this block of office hours ends.
14. If you selected **End of Term**, a new **Select a Term** field displays.
15. Click the **Select a Term** drop-down button and click the appropriate option.
16. Once you have made all your office hour selections, click the **Submit** button.
17. If you want to add another block of office hours, click the **Add Office Hours** tab again.
18. To **edit** or **cancel** an office hour block you created, click the **open icon** next to the office hour block you want to edit or cancel.
19. At this point you can either click the **Edit Office Hours** link to make changes to this block of your office hours or click the **Cancel Series** link to delete this block of your office hours.
20. Once a student schedules an appointment, it will be displayed on your home page under **Recent Changes**. You can edit the appointment the student has scheduled by clicking the **open icon** button.
21. From the **Appointment Menu** you can **Cancel** the appointment, **Edit** the appointment, **View the Student Folder**, or **View the Schedule** of the student.

**Scheduling an Appointment with a Student**

Staff members and other calendar owners can schedule appointments with students in two ways:

- Quick Add appointment during Office Hours
- Add Appointment (for any time)

To **Quick Add** an appointment with a student during Office Hours:

1. In LoboAchieve select the Appointments tab in the application toolbar.
2. Find an office hours block during which the appointment should be scheduled by clicking on the date in the calendar date picker that appears in the left column.
3. Select the add button for an available slot in the office hours block.
4. Select whether to choose a student from an active term or all terms and begin typing the student’s first or last name into the field. As the name is typed, students who match the search string will pop-up in a menu. Select the student with whom the appointment should be made.

5. The location will default to the first one entered on your profile. To change this, you must click “submit” and then edit the appointment.

6. Choose the duration of the appointment and select a reason.

7. Select Submit to complete scheduling the appointment with the selected student.

To Add an Appointment with a student for any day or time, regardless of whether office hours are held during that time:

1. In LoboAchieve select the Appointments tab in the application toolbar, then select the Add Appointment button that appears in the header.
2. Select whether to choose a student from an active term or all terms and begin typing the student’s first or last name into the field. As the name is typed, students who match the search string will pop-up in a menu. Select the student with whom the appointment should be made.

3. Select the location for the appointment.

4. Choose the duration of the appointment and select a reason.

5. Select Submit to complete scheduling the appointment with the selected student.

To Add a Group Session that multiple students can register for:

1. Click the Appointments tab.
2. Click Add Group Session.
3. The Add Group Session window opens. Fill in the title, date and frequency, time, reason, and how many students are allowed to sign up for the group session.
4. Select whether students are allowed to see other students who have signed up.
5. Select whether this supports Supplemental Instruction, which would limit the group session to students in a specific class.
6. Enter any Instructions.
7. Enter a Start/End Date if this is a recurring group session.
8. Click Submit.
To Reserve Time on your calendar during times that would usually be office hours:

1. Click the Appointments tab.
2. Click Reserve Time.
3. The Reserve Time window opens. Fill in the information of the date and start and end time that you wish to reserve.
4. Click Submit.

Viewing Appointment Information
When an appointment is created, the calendar owner can view information about the appointment in a number of ways:

1. Email Notification: If the staff member has signed up to receive email notifications for new appointments, they will receive an email each time a student schedules an appointment with them.
2. Upcoming Appointments: On the staff member dashboard, the Upcoming Appointments channel lists all upcoming appointments and allows the staff member to access details about the student and the appointment.
3. Staff member Calendar: The staff member can navigate through their calendar in the Appointments area and view details for each appointment scheduled on any day.

Waiting Room
The Waiting Room will allow you to see what students are waiting to be seen by an advisor.

1. The Waiting Room will appear under “My Services” on your home screen.

Note: This should be used for blocking time that would usually be office hours or appointment times. It is not necessary to Reserve Time for recurring meetings or your lunch period, just don’t schedule regular office hours during those times.
2. In the Waiting Room, you will see a list of students who are waiting to be seen by an advisor and how long they have been waiting to be seen.

3. Click “Start Meeting” to begin your meeting with a student. This screen will appear:
4. Click on the link for the student’s name to open the student’s folder.

5. When you have finished the visit, click “Outcomes” to write your notes from the visit.

Outcomes will allow you to enter your comments about the student’s

This link will take you to the student’s folder.

Take note of who else can view your comments about this student’s visit.

This will send a copy of your notes to the student’s email.

After you have entered your comments for the student’s visit, click “Submit” to finish the student’s visit. Your notes will be saved to the student’s folder in LoboAchieve.
My Students

Filter Your Students

1. To see your list of students, click the Students button in the top navigation menu.

2. As you can see in the Connections field, the default is to display All My Students. To see the number of all your students, look in the lower-right corner of the page.

3. To filter your list of students, click the Connection drop-down button.

4. The options on the drop-down menu are all the different ways the student list can be filtered. Select the role by which you want to filter the student list. For example, if you are an academic advisor, you could select the Academic Advisor option.

5. A list containing only the students with whom you are associated through the role you just selected is displayed. Look in the lower-right corner of the page. You will see the total number of students in the current list.

6. The Connection drop-down menu also enables you to filter students by a particular class you are teaching.

7. By using the Advanced Search feature you can narrow your results by searching for students that meet your selected criteria.

Student’s Gradebook

Student grades that are entered into UNM Learn will automatically be transferred to the Gradebook in LoboAchieve. Advisors can view this information, but should keep in mind that this may not be a full record of the student’s performance in the class. A student SHOULD NOT be advised to drop a class based on the information that is in the Gradebook. Rather, this is an opportunity to discuss with the student their performance in that class, and perhaps to encourage the student to meet with their instructor.
To get to the student Gradebook:

1. From the student’s folder, click on the Courses tab.
2. Open up the drop down arrow next to the class for which you want to view grades.
3. If the course has an online component through which grades are entered, those will appear on the left.
4. If the Instructor has tracked attendance through LoboWeb, that will appear on the right along with any tracking items or meetings associated with the course.

**Add a Note**

1. Click the Students drop-down button.
2. Click the My Students option from the drop-down menu.
3. Select the check box next to the student for whom you want to add a note.
4. Click the Add Note button.
5. The Create Note window opens. Provide a Note Type to your note by selecting an option from the drop down menu.
6. Provide a subject to your note by clicking in the Subject field and entering an appropriate subject.
7. Enter your note in the Note field.
8. Under the Note field you can select if the note is Private or Shared. Please be advised that any note created – whether private or shared – becomes part of a student’s educational record and can be subpoenaed.
9. If you want to send a copy of the note to the student and/or yourself, click the appropriate checkbox at the bottom of the window.
10. Once you have entered all the necessary information in the Create Note window click the Submit button.
11. Click the OK button.

Refer a Student
1. Click the Students link on the top navigation menu to see all of your students.
2. You can find the student you want to refer by paging through all the students listed or by searching for a particular student. Or you can enter the student’s name in the search field.
3. Click the **link to the student’s name** to bring up his or her folder.
4. Click the **Refer** tab to see a list of services to which you can refer the student.
5. Select the appropriate department or program.

6. Adding a comment to the referral will help to provide more specific information regarding your concern about the student.
7. If this referral applies to a specific course, you can select the course in the **Course Context** field.
8. Once you click the **Save** button, the referral will be passed on to the appropriate department or program on campus.

**Adding a Kudo for One or Multiple Student(s)**

1. Click the **Students** link on the top navigation menu to see all of your students.
2. You can find the student for whom you want to provide feedback by paging through all the students listed or by searching for a particular student. Or you can enter the student’s name in the search field.
3. Click the **check box next to the name of the student(s).**
4. Click the **Add Kudo** tab to see a list of kudos that you can give.
5. Select the appropriate kudo.

![Create Kudo for Multiple Students](image)

6. Adding a comment to the kudo will help to provide more specific information regarding the reason for the kudo.
7. Once you click the **Save** button, the student will be automatically notified of the kudo.

**Raise a Flag for One Student**
When you have a concern with a particular student, raise a flag to communicate your observations.
1. Click on the **Students** navigation item to see all of your students.
2. Find the student you want to raise a flag for – by searching for their name or paging through the students. Click on the student’s name to bring up the student’s folder. *Note:* Anywhere you see a student’s name as a link it will take you to his or her folder.
3. When you click on the **Raise Flag** button, a list of flags that can be raised and viewed by you is displayed.

4. Select the appropriate flag, enter comments and click **Save** button.
5. The appropriate individuals will be automatically notified.
**Raise a Flag for Multiple Students**

1. Click the Students link on the top navigation menu to see all of your students.
2. You can find the students for whom you want to provide feedback by paging through all the students listed or by searching for a particular student using the Search field. Once you locate any one of the students who are to receive the flag, click the check box by his or her name. You can select as many students as you want.
3. Click the Raise Flag button.

4. To see a list of the flags you can raise, click the Tracking Item drop-down menu.
5. Select the appropriate flag from the drop-down list.
6. A comment automatically populates the Comment field once you select the Tracking Item. You can edit the Comment field to provide the students with more detailed information on why you are raising this flag.
7. Select the Course Context so that the students will know with which course this flag is associated.
8. Click the Save button.
9. Click the OK button.

**Tracking**

From the top menu in LoboAchieve, click on Students then Tracking. This shows you all students who have been flagged, the flag name, status, created by, and creation date. You can also view recent changes to flags from your LoboAchieve home page in the “recent changes” section on the right-hand side of the home page.
**Resolve Items**

A flag is marked as resolved when some positive action has taken place by the student or on the student’s behalf. There are a couple of ways to resolve items. Look for the menu icon (✓) to the left of the item name in the student list of student folder. Select the resolution option for the selected item. In the form that opens, add a resolution note and, where applicable, a Close the Loop note.

**Create a Plan**

To raise tracking items other than flags or to raise more than one tracking item on a student at once, you must **Create a Plan**. Plans are useful for recording issues, points of discussion, and action items raised during appointments or other interventions with a student.

1. Click the **Students** tab.
2. Click the student’s name.
3. Select the **Create Plan** button.
4. Choose the **Plan Type** from the drop down options.
   - Default **Tracking Items** will appear, these can be removed or reordered as necessary.
5. Give the plan a Name and provide an Overview of the plan.
6. Add the tracking items to the plan by selecting the Tracking Item and entering the comments and other details for the item. Select the **Add Item** button to add the item to the plan.
7. Arrange the items in the list in the proper order for completion by the student.
8. Click **Submit**. If you wish to print the complete plan, select the **Submit & Print** option.
9. Note: All tracking items added to the plan will be raised when the plan is created, and a notification of each Flag will be sent to the appropriate recipients based on the permissions set for the associated tracking item rules.