LoboAchieve 2.0

Advisor Guide

Updated 8/8/2017
Dashboard
The Dashboard will be shown when you first log into the system. The dashboard is used to show advisors all the appointments that are upcoming. There are filtering options to see canceled, missed, past, and completed appointments. You have the option to switch from a list view to a calendar view.

Profile
Update profile information by clicking on the head option to the right of your name. Make sure to update your Title.
Viewing Students Records

From the Dashboard, click on the Students option on the left hand side.

Select the appropriate center

Search by ID or name. Only “Active” students will be in LoboAchieve. Notes for “Inactive” students should be left in LoboWeb. Notes for prospective students cannot currently be captured through LoboAchieve or LoboWeb.
Select the appropriate student by clicking on their name. Their student profile will have basic information.
The students transcript tab will have more information that is directly related to their degree completion. Once a student meets with an academic advisor their expected graduation date should be updated. The students transcript (including transfer work) will follow. Courses that are in red are not counting towards the students degree.

<table>
<thead>
<tr>
<th>INSTITUTION</th>
<th>OVERALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>GPA</td>
<td>3.043</td>
</tr>
<tr>
<td>Earned/Attempted</td>
<td>30 / 40</td>
</tr>
<tr>
<td>Credits</td>
<td></td>
</tr>
<tr>
<td>Semester Admitted</td>
<td>Fall 2016</td>
</tr>
<tr>
<td>Expected Graduation</td>
<td>NA</td>
</tr>
</tbody>
</table>

First Major: Pre Business Administration
First Minor: None
Second Major: None
Second Minor: None
First Concentration: None
Second Concentration: None

CURRENT COURSES

PROPOSED Fall 2017 COURSES

- MGMT 202: Principles of Financial Acct
- ENVS 101: The Blue Planet
- PHIL 101: Intro To Philosophy

FALL 2016

<table>
<thead>
<tr>
<th>Course</th>
<th>Credits</th>
<th>Grade Received</th>
<th>Points Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>GEOG 101 Home Planet: Land Water Life</td>
<td>3</td>
<td>C</td>
<td>3</td>
</tr>
<tr>
<td>GEOG 105L Home Planet: Lab</td>
<td>1</td>
<td>B</td>
<td>1</td>
</tr>
<tr>
<td>MATH 101 Intermediate Algebra Part I</td>
<td>1</td>
<td>A</td>
<td>1</td>
</tr>
<tr>
<td>ENGL 113 Enhanced Composition</td>
<td>4</td>
<td>B+</td>
<td>4</td>
</tr>
<tr>
<td>MUS 142 Rock Music Appreciation</td>
<td>3</td>
<td>A+</td>
<td>3</td>
</tr>
<tr>
<td>MATH 102 Intermediate Algebra Part II</td>
<td>1</td>
<td>NC</td>
<td>0</td>
</tr>
<tr>
<td>UNIV 101 Sem: Explore Business</td>
<td>3</td>
<td>D</td>
<td>3</td>
</tr>
</tbody>
</table>

TERM GPA: 2.62   CREDITS: 15 / 19   POINTS: 42.31

SPRING 2017

<table>
<thead>
<tr>
<th>Course</th>
<th>Credits</th>
<th>Grade Received</th>
<th>Points Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECON 106 Introductory Microeconomics</td>
<td>3</td>
<td>B-</td>
<td>3</td>
</tr>
</tbody>
</table>

TERM GPA: 3.27   CREDITS: 15 / 21   POINTS: 48.99
On the students notes tab advisors will be able to see previous notes that have been left on a student’s record. Notes from LoboAchieve 1.0 have been migrated over. *For now: notes from LoboWeb are not being migrated over. These notes will be migrated over soon.*
The Student Files tab allows advisors the ability to upload files to the students records. Acceptable formats are: .doc, .pdf, .xls, and all image formats.
Leaving notes on students records

There are two types of notes that can be left on a students record. The first type are notes that are left after meeting with a student face-to-face. The second note type are all other types of notes (email follow-up, form signature, etc).

HOW TO ENTER NOTES FOR STUDENTS THAT YOU HAVE HAD AN APPOINTMENT WITH

Once you have clicked on “New Session” and pulled up the students file you will see:
When meeting with students about their academic progress Academic Advisors should select the term that the student will be graduating. Student Affairs advisors and non-academic progress meetings should select N/A. The option to email the student a copy of the notes will be automatically check marked. Even if you do not email the student a copy of the notes the student will be able to access all notes through LoboAchieve. When leaving notes on students records make sure to include: potential schedule, policies discussed, referrals made, and any additional relevant information. Do not include: Health issues, defamatory statements, __________.

How to leave a note on a students record when you did not meet with them face-to-face:
After selecting the “Students” option on the left hand side, search for your student and select their name.

Select the speaking bubble on the left hand side to leave supplementary information on a students account.

Leave comment in this box (Dialog box will open).
When you hover your mouse over a comment that you have previously left on a student's record, you have the option to edit the comment. Every time you make a change, the previous versions of the comment will be available to you, other advisors, and the student.
Shannon Saavedra

May 19, 17 at 12:21
hh

May 19, 17 at 12:28
hh edit

Make appropriate edits. Comment cannot be left blank.
Building Availability
Below find instructions on how to create advising availability that students will be able to use to schedule appointments with their advisors.

1) First click on your availability link on the left-hand side of the page.

2) Building Templates
   a. What are Templates? Templates create the appointment details (Advising Office and type of appointment) that will be used when you build office hours. You will not be able to create availability in the system until you have created a template. To create a Template, select Show Template.
b. Select create new

c. Scheduled availability will be a different template from walk in availability. Fill out the information for this Template and select create. Please keep in mind that you can create multiple Templates for your needs. However, templates currently cannot be deleted (this ability will be released at a later point).
d. Once the templates that will be used have been created, move into building availability. In the Calendar, click and drag on the desired start date and time period to create your appointment block office hours.

e. Select the template you want to use, and decide if this will be a single instance or if the instance will need to repeat. When selecting the repeat option, you can select which days the availability will be repeated and the end date that this availability will be built through. Once save has been selected the availability will be able to be seen by students.
f. If the created availability needs to be removed, just click on the part that needs to be adjusted. *There is no way to edit at this point in time*

Any appointments that had been scheduled during that time will be canceled. Students who had appointments during this time will be sent an email informing them of the cancelation. *There is no way (currently) to cancel just one appointment (from this view, the whole block must be canceled).* Individual student appointments can be canceled by going into the appointment from the Dashboard.