

Effectively Utilizing LoboAchieve in Academic Advisement

❖ Finding Advisors & Scheduling Appointments

1. “Search Services”
2. “Members”
3. “Schedule Appointment”
 - “Week” – Finds availability for all advisors

❖ Searching for Students

- “Students” tab
 - Options: “My Students” or “Tracking”
- “My Students”
 - Search for only specific student populations
 - Add Flags, Referrals, To-Dos, Kudos, Success Plans
 - Send Message, add Notes
 - Download search results
- “Tracking”
 - Search for students with Flags, Referrals, Kudos, and To-Dos
 - Resolve Flags
 - “Comments” - Send message to student and instructor
- “Add Filters”
 - Search for specific student populations
 - Tracking Item – Specifies Flags, Referrals, Kudos, and To-Dos
 - “Tracking Type” is where you find your flags
 - **Attributes** – Specifies the parameters you want to search
 - Check for spacing at the beginning of the search parameter.
 - If there is one space in the beginning, your search won’t work
- Sending Messages
 - “My Students” – ‘Note’ is the tab to use to send messages to students.
 - Make sure to *check “Send copy of note to student”*
 - “Tracking” – ‘Comment’ is the tab to use to send messages to students
 - Make sure to *check “Send copy of note to student”*
 - You can also send a copy to the Instructor who flagged the student

❖ Working with Probation through LoboAchieve

- UCAC sends all important messages through “Notes”
- If student hasn’t signed a contract, we send them a message to see an advisor
- You can search for probation students with specific majors and whether or not they’re enrolled.
- How to Search for Probation Students
 - Under “Cohorts & Relationships”
 - Term – Fall 2014
 - Connection – UAC Advisor
 - Under “Attributes”
 1. PROGRAM - BA-UNDC-UC : Bachelor Undecided
 2. ACADEMIC STANDING - BLANK
 3. REGISTERED HOURS – BLANK