



LoboAchieve Policies and Practices

Approved By: Director, Office of Advising Strategies, March 25, 2022

INTRODUCTION

LoboAchieve is an advising application that allows students to schedule an appointment with their advisor and access their advising notes. It also allows advisors to manage their availability for appointments and walk-ins and record their advising contact.

The Institute of Design and Innovation (IDI) is the technical lead that develops, upgrades, and maintains the LoboAchieve App. The Office of Advising Strategies (IDI) is the functional lead that sets up advising units, troubleshoots issues, requests new features, provides training, and manages usage policies.

POLICIES

1.0 Users

- 1.1. Students – LoboAchieve was designed with student interaction with advisors in mind.
- 1.2. Active Students – Log into LoboAchieve with their NetID and Password. Students become active users upon creating a NetID.
- 1.3. Returning Students – Students that have not enrolled at UNM for more than three terms become inactive, thus are unable to log in with their NetID. They may use the app as prospective students. Once they are re-admitted, they will need to use the app as active students.
- 1.4. Prospective Students – Before being admitted and creating a NetID, students may use the app through a personal email account. Once they are admitted, their prospective account will be merged with their active student account, and their prospective student account will be deactivated.
- 1.5. Staff Advisor Usage – Log into LoboAchieve with their NetID and Password. Access is granted to those in advising classifications (i.e., Academic Advisor, Student Success, International Education advisor) pending the approval of their supervisor. Other classifications may be addressed on a case-by-case basis and depend on advising responsibilities.
- 1.6. Staff Support and Scheduler Usage: Log into LoboAchieve with their NetID and Password. Access is granted to those supporting advisement units pending the approval of their supervisor.
- 1.7. Faculty Advisor Usage - Log into LoboAchieve with their NetID and Password. Before becoming authorized users, must coordinate with their unit's Workbook manager. Access is granted to those in undergraduate or graduate faculty advising roles.

- 1.8. Student Employee Usage - Log into LoboAchieve with their NetID and Password. They will have access as students seeking advisement and as an employee. Limit access is granted to those in support roles.
- 1.9. Workbook maintainer/authorizer/updater – A designee within an advising unit that provides OAS lists staff and faculty users and their assigned advising load (called connections) and notifies OAS of staff or faculty departures.
- 1.10. Unit Manager- A designee(s) within an advising center who manages the LoboAchieve unit and are typically supervisors, managers, administrative assistants, or Unit Administrators. Staff in this role grants access to their office, department, or college’s advising unit. Individuals are not able to gain access without a Unit Manager’s approval. Unit Managers have LoboAchieve reporting access.
- 1.11. Exceptions to LoboAchieve roles - OAS will review exceptions to roles and access on a case by case basis, with equity and fairness across units in mind.
- 1.12. Training – all users are required to complete Securing Private Data training. Staff and student employee users are required to complete LoboAchieve for Staff training.

2.0 Notes in LoboAchieve

LoboAchieve notes are part of students’ records and are governed by the [Student Records Policy](#). Additionally, advising notes document advising sessions and allow students and other relevant advisors to view the advising history. The notes should help students and future advisors understand the advice given and should be written with the student as the reader.

- 2.1. When leaving notes in LoboAchieve, it is vital that an advisor
 - a. verify notes are being left on the correct student
 - b. files being uploaded belong to the correct student.

Interactions that lead to LoboAchieve notes include advising sessions, emails, form documentation, and progress updates. These notes may discuss the student’s program (major, minor, etc.), classes, graduation, holds, and post-graduate or career goals and needs. Difficulties with academics, referrals, or assistance for sociocultural needs, finances, or personal issues; however, care must be taken not to disclose confidential details.

- 2.2. Copy/Pasting items to advising notes:

- **Emails:** An email saved in LoboAchieve should only include the pertinent conversation between the advisor and the student. Email threads that include messages from third parties (e.g., faculty, service providers) should not be included. Only include the message and exclude signatures, extensive college information, quotes, contact information, etc. Please summarize long messages or save them as an upload to the students' file.
- **Images:** Images should never be saved in a LoboAchieve note. If there is a relevant image to a student’s advisement, please upload it to their file.

2.3. Notes that should **not** be left in LoboAchieve include:

- **Academic Grievances.** While an academic issue affecting academic progress can be noted, detailed notes about the grievance process and the student's personal feelings should not be included.
- **Personal Hardships:** Students experiencing difficulties related to medical, familial, or other personal issues should not have these detailed in LoboAchieve.
- **Behavioral Concerns:** Concerns, documentation, and referrals about students who've displayed behavioral issues should be referred to the Dean of Students' office and not documented in Lobo Achieve.

2.4. Note Removal – Advisors that have placed a note or uploaded a file on the wrong student must email loboachieve@unm.edu immediately and include the reason for the error, exact date and time of note placed, the student name, and ID#. OAS and IDI must retain a record of the error being removed in the IDI database for data integrity.

3.0 Data Management

All LoboAchieve data will be stored in UNM's Enterprise Reporting Database (ODS) in conjunction with UNM Information Technologies (IT), Enrollment Management (EM), and the Institute of Design & Innovation (IDI), the Office of Advising Strategies (OAS) Doing so will allow the usage of advisement data for future projects such as the Student Enterprise Project, data analysis in MyReports, and Enrollment/Recruitment campaigns in Enrollment Management.

3.1. To ensure data integrity and provide beneficial information, LoboAchieve records must be timely and accurate. This includes:

- Using LoboAchieve if access is granted. (If LoboAchieve is not used at least once per semester, access will be revoked.)
- Verifying the correct student is chosen before scheduling appointments or placing notes or files on their record.
- Beginning and resolving all appointments promptly (i.e., within 15 minutes of appointment ending and at the latest by the end of business day).
- Leaving notes summarizing student interactions and instructions. Please see the LoboAchieve Notes policy for more information.

3.2. Repeated actions involving:

- Entering notes or files on the wrong student
- Failure to resolve appointments promptly
- Failure to document advising interactions
- Creation of fake records or students

May result in progressive actions as follows:

- First contact - A reminder of policy and expectations to the employee.
- Second contact - A reminder of policy and expectations to the employee and supervisor.
- Third contact - A notification to the supervisor requesting performance improvement.
- Fourth contact - Loss of access to LoboAchieve until a resolution can be achieved.

4.0 Unresolved Appointments

When an advising appointment ends, advisors close out the appointment by entering notes as described in policy #2 *Note in LoboAchieve*. Unresolved appointments occur when a meeting with a student is not completed, marked as missed or cancelled. Appointments must be resolved promptly to maintain and report accurate student data. Therefore, it is expected that advisors will:

- Begin and resolve all appointments promptly (i.e., within 15 minutes of appointment ending and at the latest by the end of the business day).
- Leave notes summarizing student interactions and instructions.

Repeated incidents of unresolved appointments may result in actions outlined in 3.2.1.

5.0 LoboAchieve and FERPA, HIPAA, and Student Records Policy

LoboAchieve advisors and support staff must complete training and be compliant with FERPA and the [Student Records Policy](#) regulations. LoboAchieve is not HIPAA compliant. Thus information about medical conditions must not be recorded in advising notes. Violation of either FERPA, Student Records Policy, or HIPAA must be reported to OAS, the Registrar, and the Dean of Students Office. OAS sanctions for violations can result in loss of LoboAchieve access.

6.0 Prospective Student Accounts and Records

Students interested in attending the University may use LoboAchieve by creating an account to access an advisor, track their advising appointment, and access their records.

6.1. Creating a record - Prospective students may create an account using a personal email account and provide a few unique identifiers. Advisors and Schedulers may also create an account on behalf of a prospective student, but the student will need to verify the account.

6.2. Confidentiality - Prospective LoboAchieve records are not subject to FERPA or the Student Records Policy since they are not enrolled in the University. The FERPA starting point at UNM is when new students attend the first day of classes; however, the utmost care should be followed to hold information confidentially.

6.2.1. Once a student has enrolled, FERPA and the Student Record Policy protect the LoboAchieve record as a prospective student.

6.2. Duplicate records. - OAS will merge duplicate prospective student records and direct students to one account. Advisors should report duplicate records within the LoboAchieve app or by emailing loboachieve.unm.edu.

6.3. Merging record(s) - When a student is admitted and receives a NetID, OAS will move their record to an active student record and deactivate the prospective record. Active students must not use a prospective account.

6.4. The official record - Newly admitted students who mistakenly create a prospective record would be directed to their active student accounts. Advisors should leave advising notes on the student account and disregard the prospective account.

7.0 Waiting Room Functionality

Advising Units may use the waiting room function to monitor student arrivals of appointments, workshops, and walk-ins. In LoboAchieve, “waiting room” refers to virtual space and not the advising center’s physical space. Students are expected to be “claimed” when an advising session begins and to enter advising session notes. LoboAchieve reports reflect the time between sign-on and advising session starting. Therefore, students should not be left in the waiting room.

8.0 Requesting and Creating a LoboAchieve Unit

Departments and offices wishing to use LoboAchieve to manage their calendars and track their contact with students may request the creation of a LoboAchieve Unit.

8.1. Eligibility

Academic colleges and departments are eligible for a LoboAchieve office. Integrative advising offices with Student Success Specialists or International Education Offices are eligible for a LoboAchieve Office. Units and staff outside these classifications must demonstrate their relevance to advising to be eligible for a LoboAchieve Office.

9.0 Maintaining Accurate Advising Staff

Advising Unit Managers must notify OAS by emailing loboachieve@unm.edu with any staffing changes immediately and before the change occurs. Departing staff should be removed by their last day of employment, and a replacement named to maintain student assignments and prevent students from having an advising gap. To maintain data integrity and comply with FERPA and Student Records Policies, staff no longer employed in an advising unit should not access LoboAchieve.

10.0 LoboAchieve Office Demise

LoboAchieve offices must remain active for OAS and IDI to maintain a vibrant app. If an existing office has not had any activity in 12 consecutive months will be demised. Activity includes calendaring and the creation of notes tied to the office.

11.0 Appointment Reasons

OAS maintains appointment reasons that are currently in use. Request for new or to retire appointment reasons will go through a review period that includes the needs, who will be impacted, and if the change applies to all or most LoboAchieve advisement units. Reasons for only one or two units will not be entertained.

12.0 Reports

Unit Managers have access to LoboAchieve reports that help supervisors track the advising unit's traffic and calendaring. Data from reports should only be used for managing a unit and should not replace MyReports as the University's official enrollment report.