UNM OFFICE OF
ADVISING
STRATEGIES

LoboAchieve 2.5

Advisor Guide

Updated 1/21/19

Home Page

The Home Page will be your landing page when you first log in to the system, which will display any upcoming appointments on your calendar. There are filtering options to see cancelled, completed, and/or walk-in appointments.

The appointments that have not been marked as missed, cancelled, or have notes entered will show up under the unresolved appointments section. All appointments must be noted as missed, cancelled, or have notes entered in order for them to be marked as complete.

Unresolved Appointments

AH		🕐 01/09/19 11:30am - 11:55am
👥	Nursing Admission Workshop	🕐 01/09/19 12:30pm - 1:00pm

Today's Agenda

Show Cancelled ⬤   Show Walk-Ins ⬤

KP		CANCELLED	🕐 8:30am - 8:55am
DA			🕐 9:00am - 9:25am
AH			🕐 9:30am - 9:55am
DA		CANCELLED	🕐 10:30am - 10:55am
BV			🕐 11:30am - 11:55am
DG			🕐 12:00pm - 12:25pm
👥	Nursing Admission Workshop		🕐 12:30pm - 1:00pm

Profile

The **Profile** tab will include information about yourself. You MUST update your title (you should indicate what department you advise for in your title), but should update all areas in this tab. To update your profile information click on the arrow right of your name and selecting "Profile & Settings".
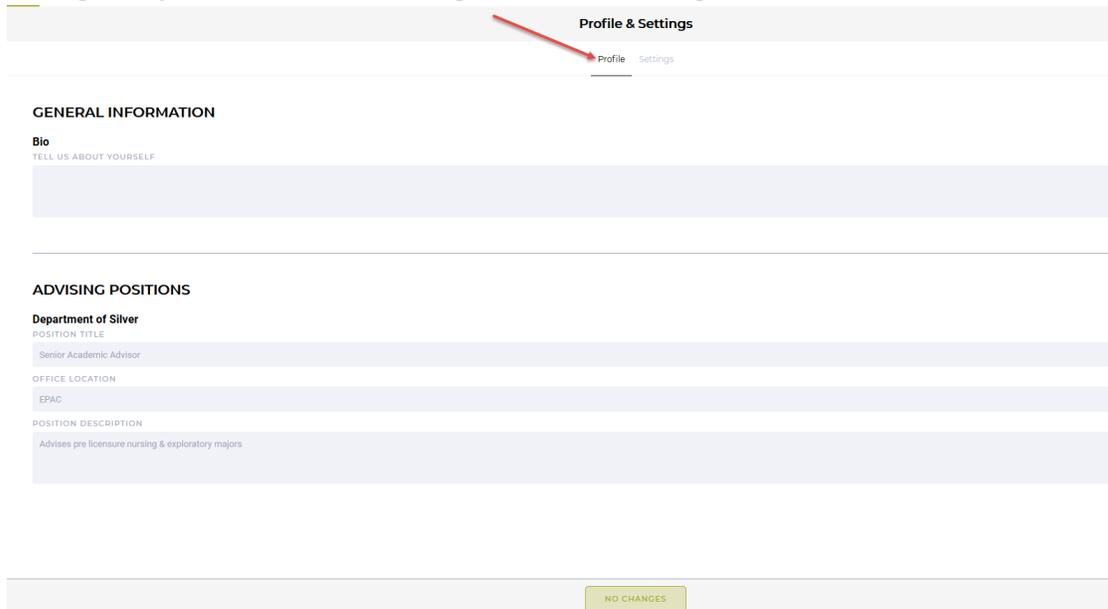
Profile & Settings

Profile   Settings

GENERAL INFORMATION

Bio
TELL US ABOUT YOURSELF

ADVISING POSITIONS

Department of Silver
POSITION TITLE

Senior Academic Advisor

OFFICE LOCATION

EPAC

POSITION DESCRIPTION

Advises pre licensure nursing & exploratory majors

NO CHANGES

The **Settings** tab will allow you to enable Outlook Integration. By selecting "Enable Outlook Integration", you are granting access for LoboAchieve to connect to your Outlook calendar. All users with an "@unm.edu" Outlook calendar will be able to see scheduled appointments on their calendar as "busy" and unscheduled availability as "free". All meetings scheduled in Outlook will block over availability built in LoboAchieve.
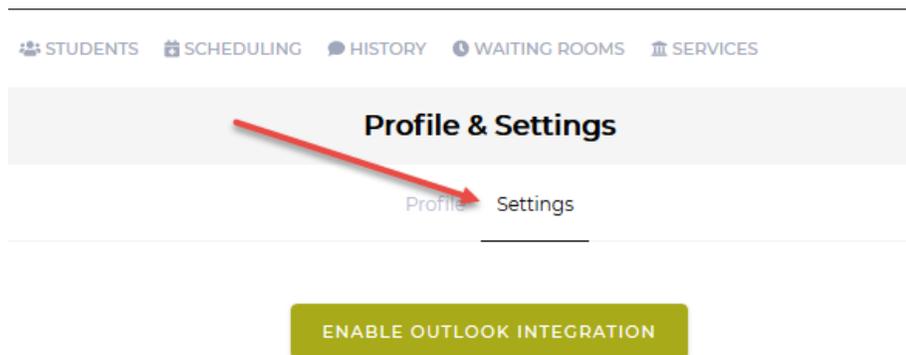
👥 STUDENTS   📅 SCHEDULING   💬 HISTORY   🕐 WAITING ROOMS   🏛 SERVICES

Profile & Settings

Profile   Settings

ENABLE OUTLOOK INTEGRATION

Viewing Student Records

From the Menu bar, click on the **Students** tab. You can search the student by their ID # or name. Only active students will be in LoboAchieve. Visit summaries for inactive students should be left in LoboWeb. Please keep in mind that any visit summaries for prospective students cannot be captured through LoboAchieve or LoboWeb at this time.

To search for a student, type in the student's ID # or name. Select the appropriate student by clicking on their name, which will display the student's profile. The **General** tab on this page will include basic program information about the student as well as any upcoming appointments.
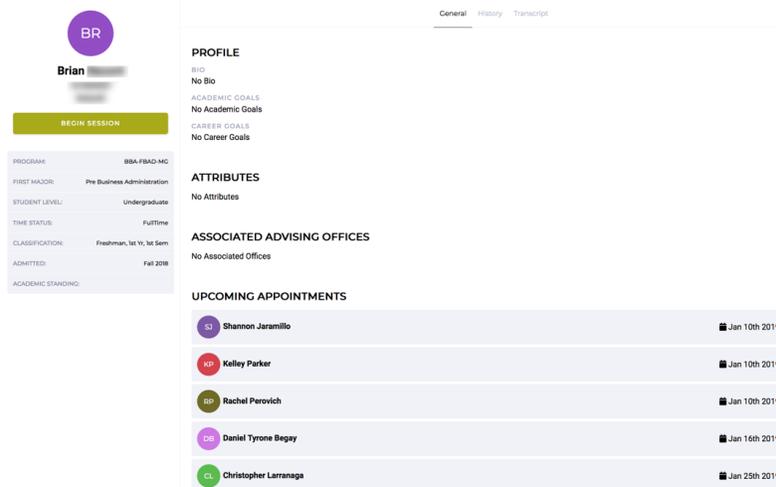
The **History** tab will include all appointment visit summaries, non-appointment comments, and any uploaded documents.

The **Transcript** tab will include course information from the student's record. Please remember that the information displayed here is <u>unofficial</u>. **Always** refer to the student's official transcript, which can be accessed in Loboweb.

Building Appointment Availability

The term "Templates" will be used throughout this section. Templates contain appointment details, such as the appointment type, location, and description. You will need to create availability first before creating a Template, which will be discussed in more detail later on.

Follow the steps outlined below to build your availability for students to make appointments with you:

1. First, click on your calendar tab at the top of the page. From here you can select the view of your preference (Month, Week, or Day).
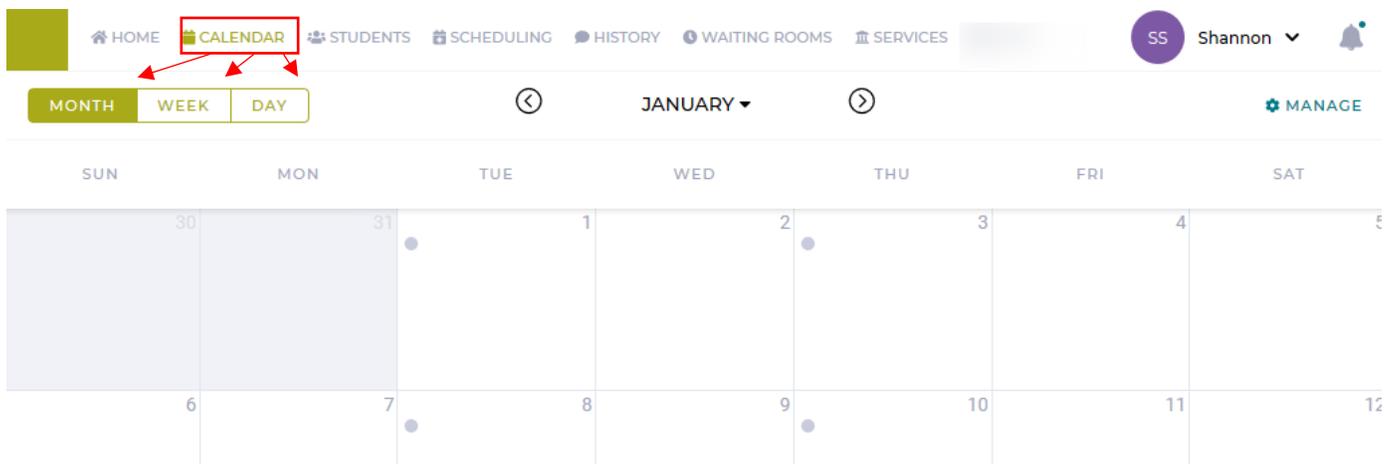
2. Next, select the "Manage" option located at the top right corner of the calendar:
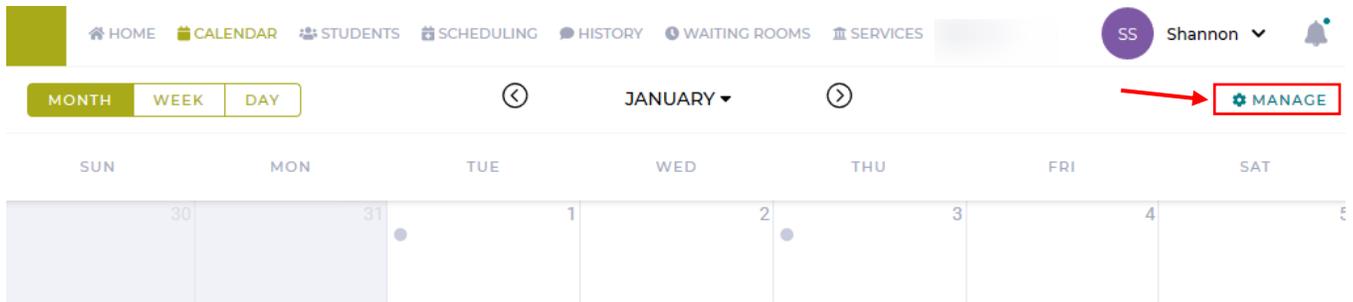
3. Once you select this option, you will see a menu of options. From this list, select "New Availability"
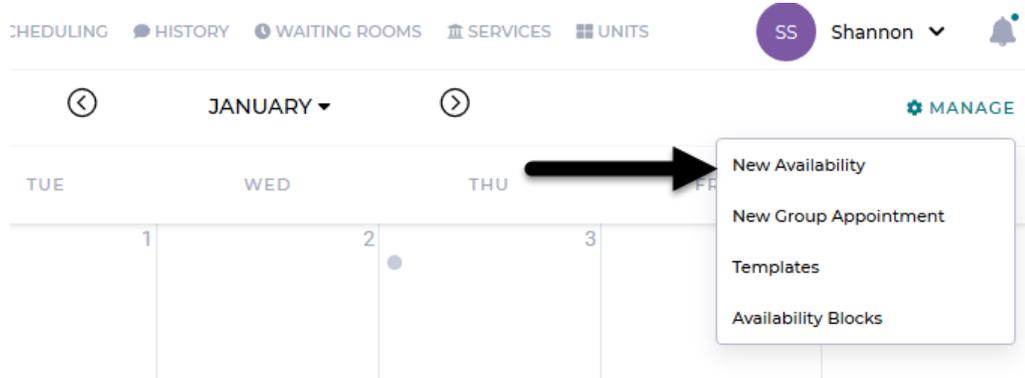
4. After selecting "New Availability," you will see:
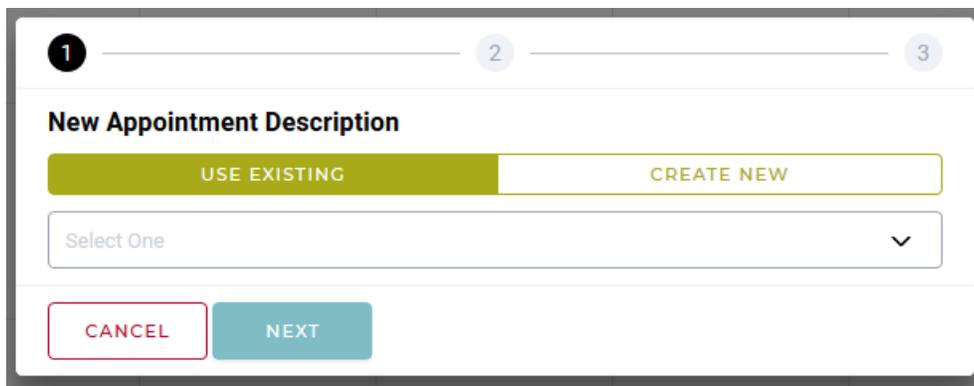
You will have the option to use an existing template (one that you have previously created) or create brand new availability. Please keep in mind that you will need to create separate templates for each type of appointment type: Walk-ins, Scheduled Appointments, and Group Appointments).

5. Select "Create New" and fill out the template with information (view example below):

Once you fill out the information for the new template, click "Next".

6. On the next screen, click and drag the availability block from the desired start time to the desired end time:

7. Once you click and drag, release the mouse. The following will appear:

You can modify the start time and end time, the number of appointment slots you would like to have within the block, and have a visual example of what it might look like.

8. You can select the "Repeat" option if you would like to repeat this availability block on certain days and until what date you would like to repeat this availability until:
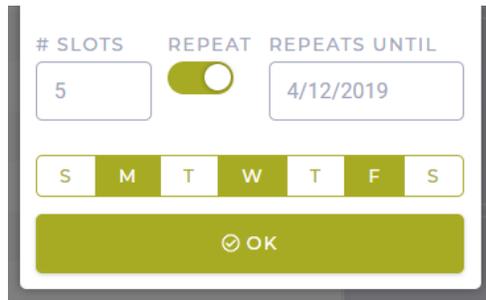
9. Once you fill out the required information in this window, select "OK" and click "Next" located on the top right corner of your calendar page.
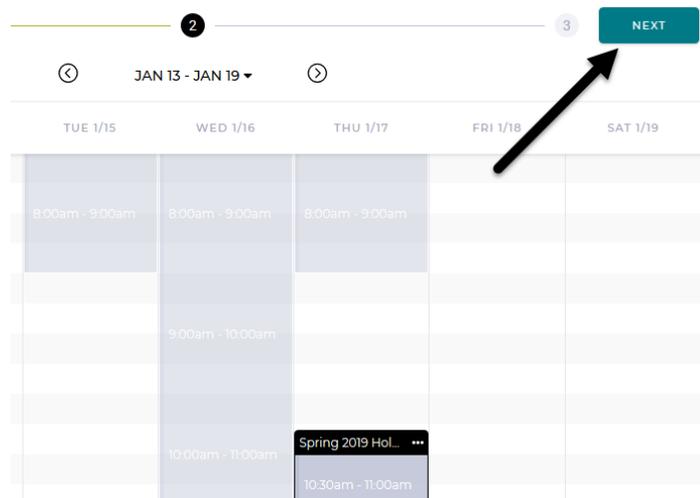
Remember to click **NEXT** on the work you have completed, otherwise you will lose your progress.

10. The next window will ask you to confirm the appointment availability block you are trying to create:
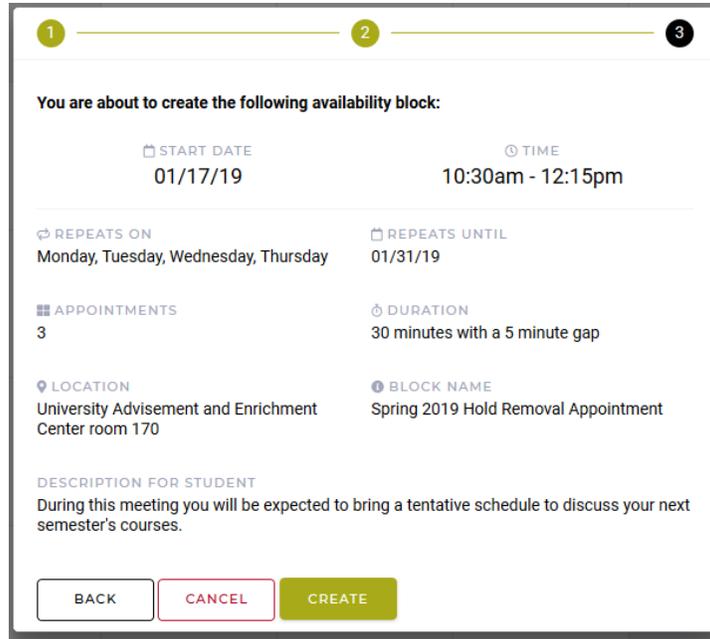
Read the information carefully to make sure it contains the correct information for the block you are trying to create. If you need to make corrections, click the "Back" button. If the information on this screen is correct, click "Create."

11. The availability block confirmation window will disappear and, if there are no issues, you will see a confirmation message on the bottom right hand corner of your screen like this:
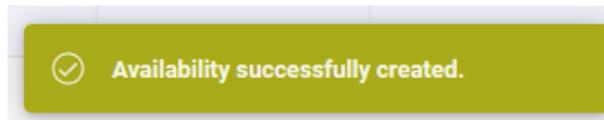
If you accidentally double-booked yourself you will see the following message:

⚠ This block has 4 conflicts with other availability. No new availability will be created on conflicting days.

⌃ HIDE CONFLICTS
01/24/19
01/29/19
01/31/19
02/05/19

Building Group Appointment Availability

You will need to create Group Appointments separately. To create group appointments, follow these steps:

1. Go to the "Manage" menu and select "New Group Appointment":
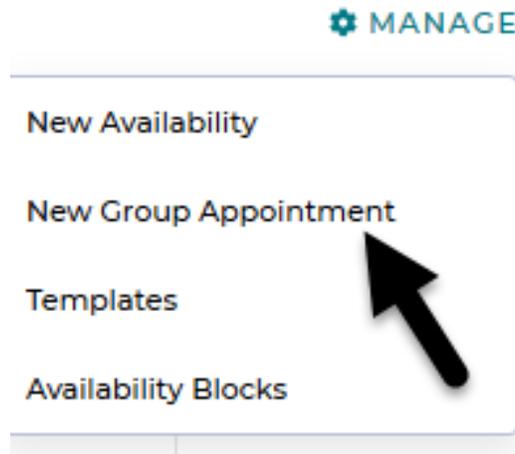
2. Next, similar to appointments, you will have the option to use an existing template you've already created or create a new one. Select "Create New" and fill in the text fields provided with pertinent information, including the capacity:
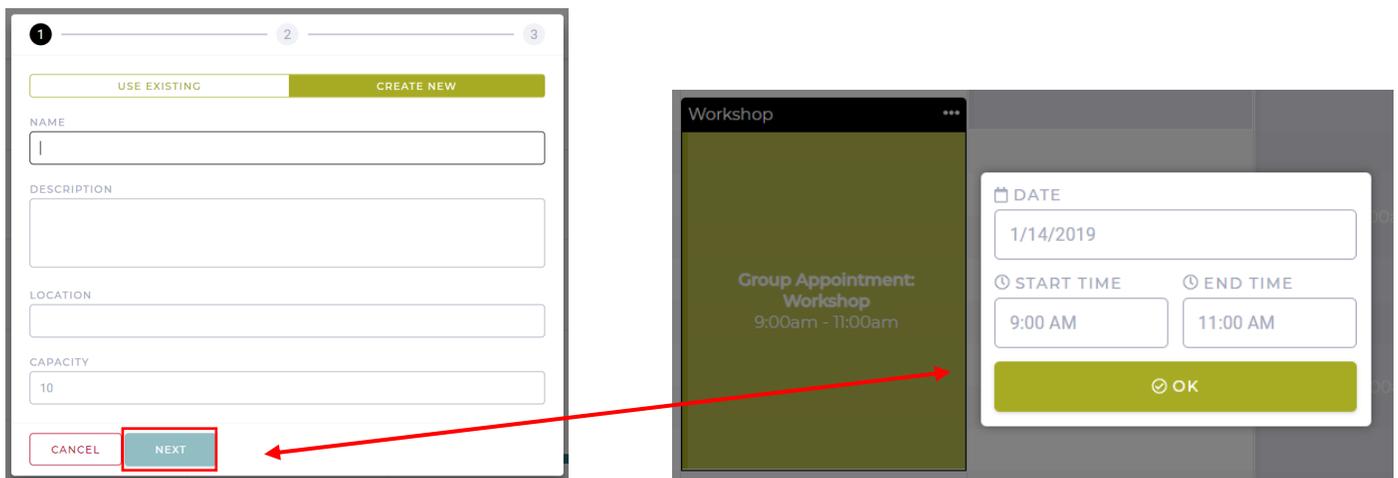
3. Click "Next." Similar to creating appointments, you will need to click and drag until the group appointment block displays the desired length of time. You will be able to edit this information when you release the mouse. To proceed, click "OK" then "Next" on the top right corner of your calendar screen.

4. Review the information for the block you are trying to create. To confirm and create this block, select "Create." To modify the information, select "Back."
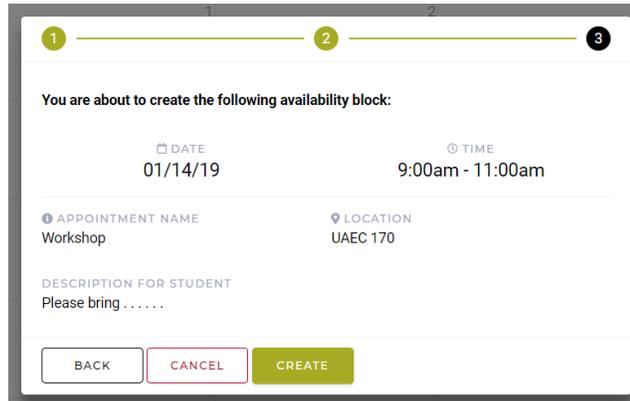
Currently, <u>repeating group appointments is not available</u> and you may need to create each group appointment separately. Please check back later for the most up-to-date information.

Accessing and Modifying Existing Templates

Once you have created a template you will have the ability to modify or delete it. To do so, select the "Manage" option in the top right-hand corner of your Calendar tab and click on "Templates"
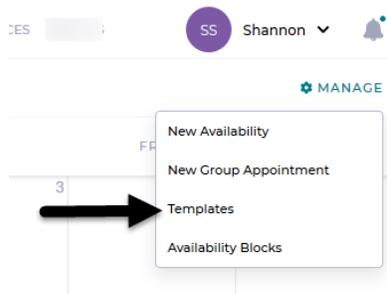
A list of previously created templates you've created will appear:

When you select a template, you can edit the template's information or delete it:
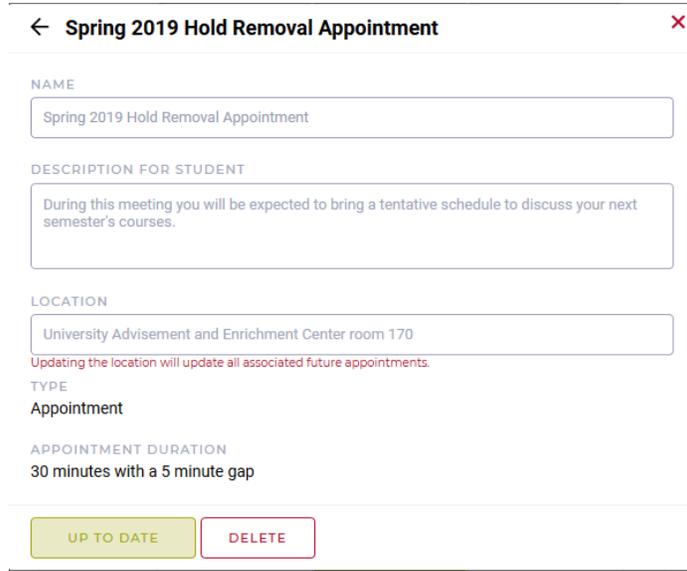
Accessing and Modifying Existing Availability Blocks

Under the "Manage" menu, select Availability Blocks:
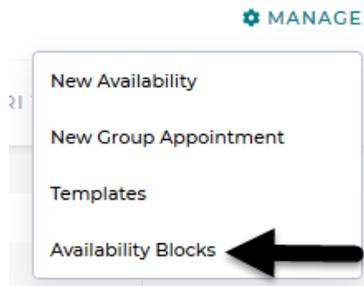
This will show you all <u>active</u> availability block.
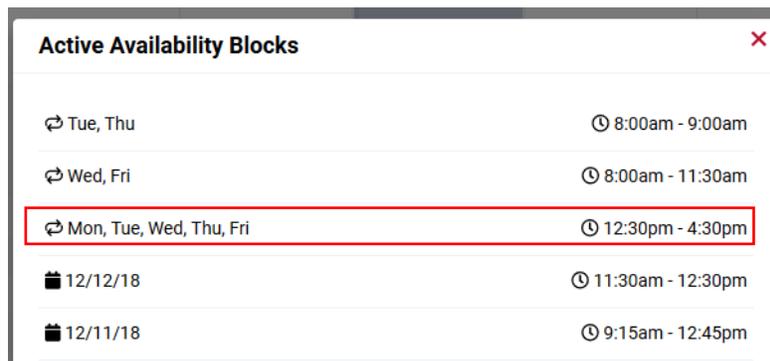
When you select a block, you will have the option to remove it:
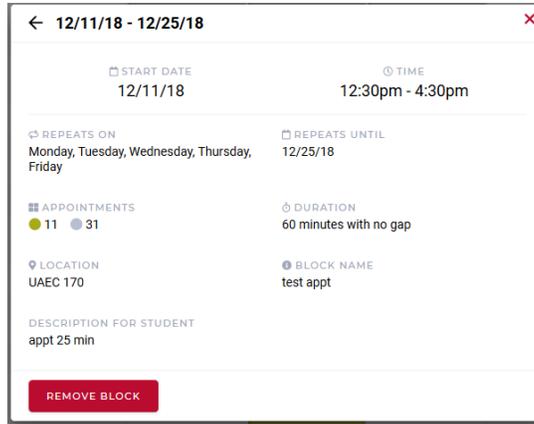
If appointments exist within the block you are trying to remove, you will have the option to select the appointments you would like to keep, otherwise the appointments you do not select will be canceled when you click "Submit".
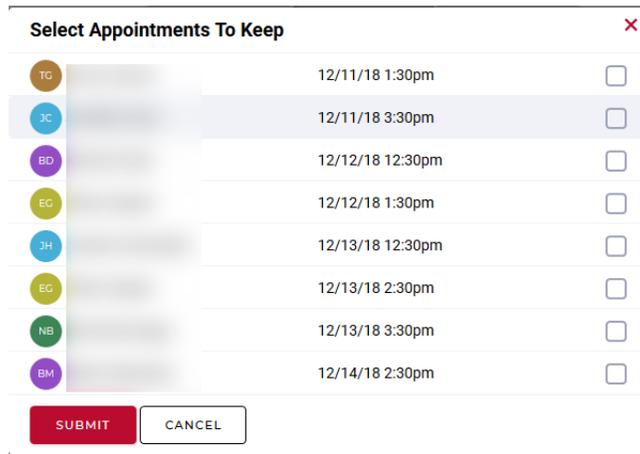
The appointments you do not select to keep will prompt a cancellation window, where you will need to provide a reason for the cancellation. You will not have the ability to replace these cancelled slots because they will be deleted with your availability block.
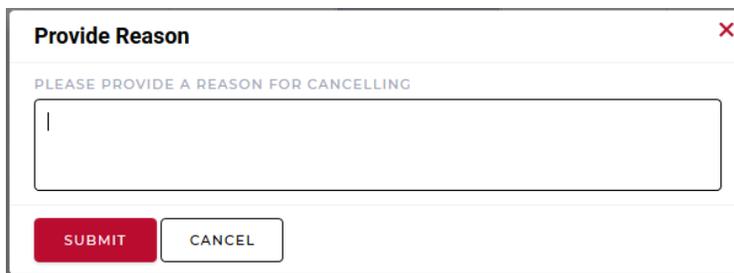
If you are comfortable with the reason you've provided, click "Submit." A confirmation message will appear on the bottom right hand corner if the action was successful (this will disappear rather quickly).

Another way to remove a block is by simply going to your Calendar tab. Hover over the block you are wanting to remove to create a black outline, and click on the three dots located on the top right corner of your selected block (see below):
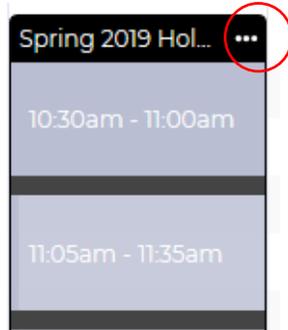
The following pop-up will give you the option to remove the block just for that day, or all of the blocks that it repeats:
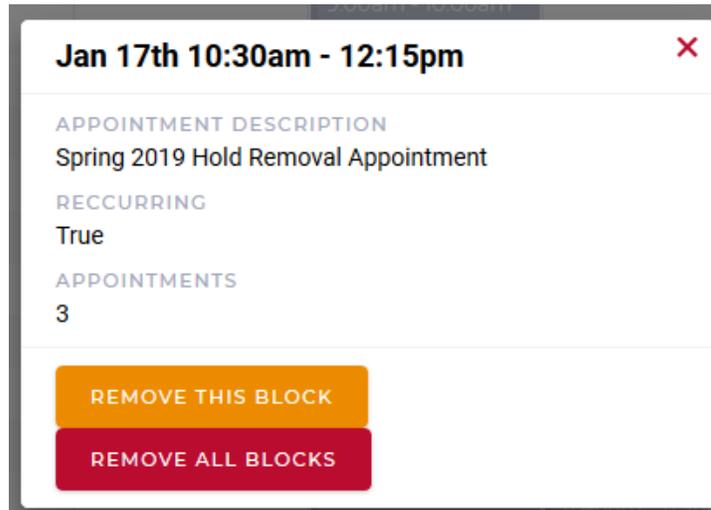
How to Begin an Appointment Session

You can begin a session in 3 different ways:

1. Via the Home page in the "Upcoming Appointments" section:
   - ➢ Click on the appointment you'd like to begin and select "Begin Session".

The following window will ask you what you want to do with the appointment.
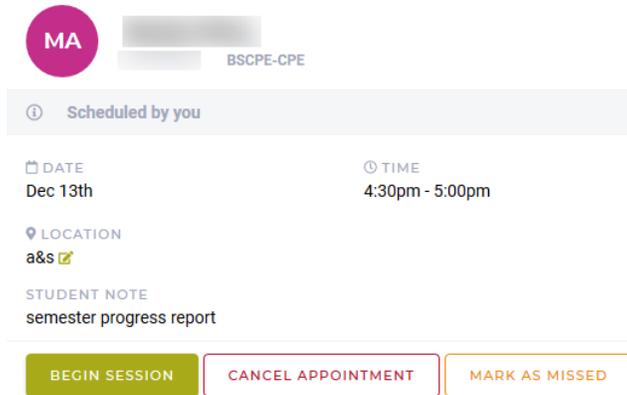
You can also cancel an appointment here, which can also be done through the Scheduling tab. You can only mark an appointment as "Missed" **after the time** the scheduled appointment has passed.

When leaving notes on students records, please remember to:

- ➢ **INCLUDE**: potential schedule, policies discussed, referrals made, and any additional relevant information.
- ➢ **DO NOT INCLUDE**: Health issues, defamatory statements, etc.

2. Via the Waiting Room:
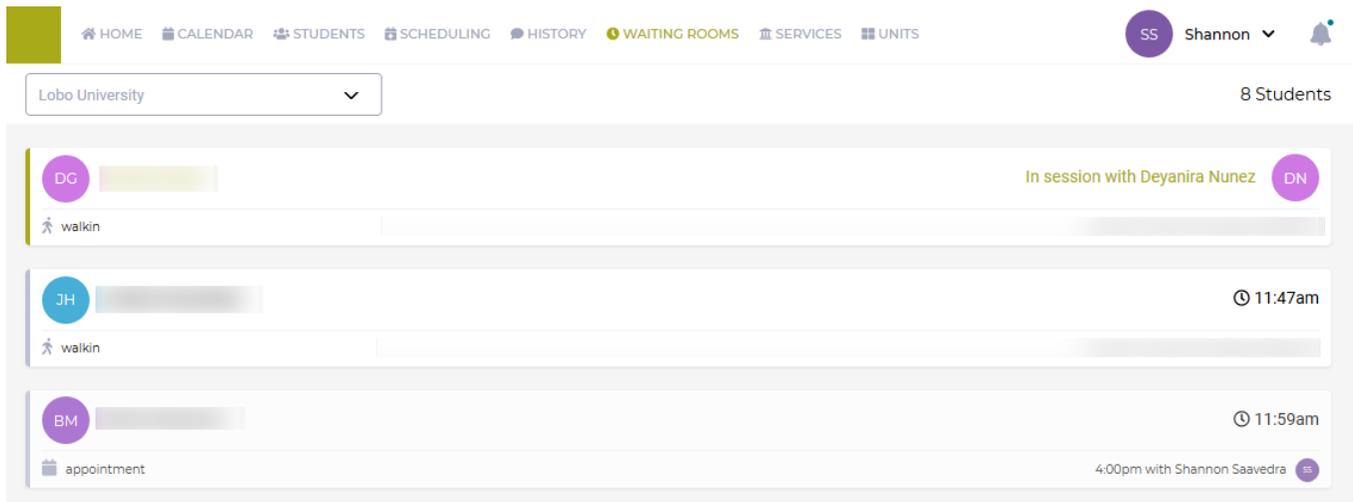
3. Via the Calendar Tab
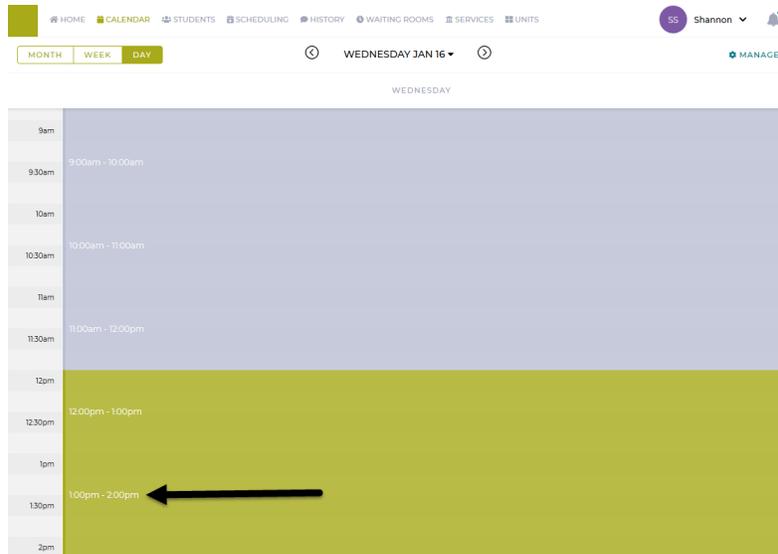
Leaving Comments in Students' Records

Below are some important terms you should become familiar with as well as how to leave comments for each:

- **Advising Appointment -** Refers to an unscheduled appointment, a scheduled appointment, or group appointments that is a resulting meeting between advisors and students. This can be done with video and/or audio formats.

  ➢ You can leave Visit Summaries on the student's record when you click "Begin Session" from the student's profile (please refer to previous section of this handbook – *How to Begin an Appointment Session*). You can also access their information after beginning a session (see below):
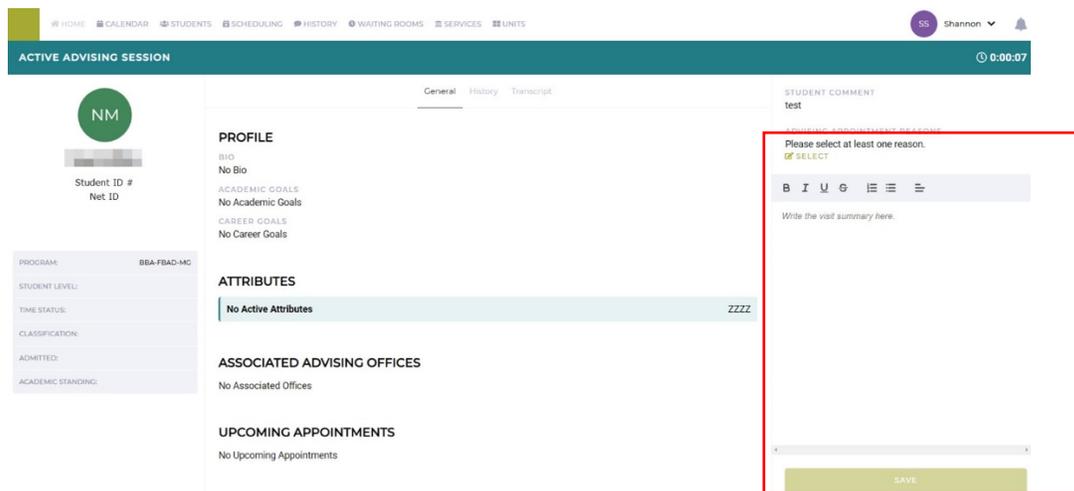
  ➢ Please remember to enter your visit summaries AND select at least one advising appointment reason. LoboAchieve will not allow you to end the session unless you do this.

- **Non-Appointment Comments** – An entry that was left on a student's record that is <u>not attached to an Advising Session</u>. You will be able to upload files to the student's record as well. Click on the "Non-Appointment Comment" button located in the student's profile below "Ad-Hoc Session"– see below:
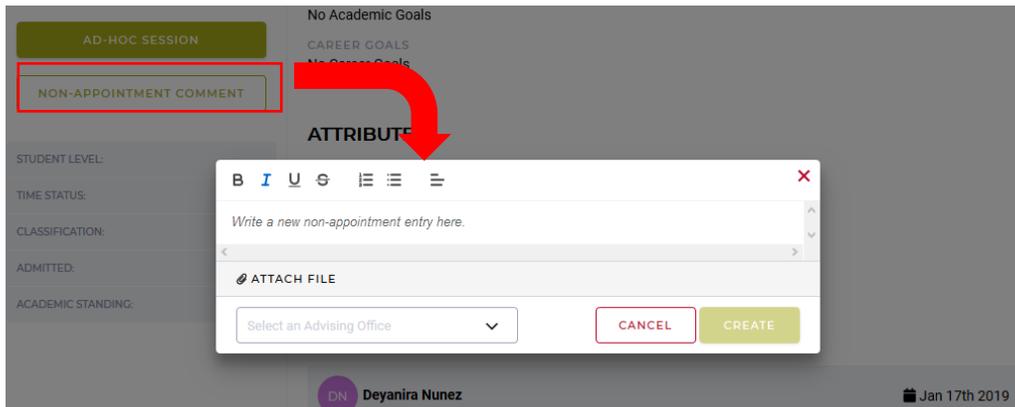
Non-Appointment comments left on a student's record will prompt an email to be sent to the student. It will notify them that a comment has been left on their student record. For the student to view this, they can log in to their LoboAchieve account and click on their History tab.

- **Ad-Hoc Appointments** – This is an appointment that is stand alone and does not belong to an availability block. It should only be used <u>if the student did not have an appointment with you and if they were not logged into the waiting room as a walk-in</u>.
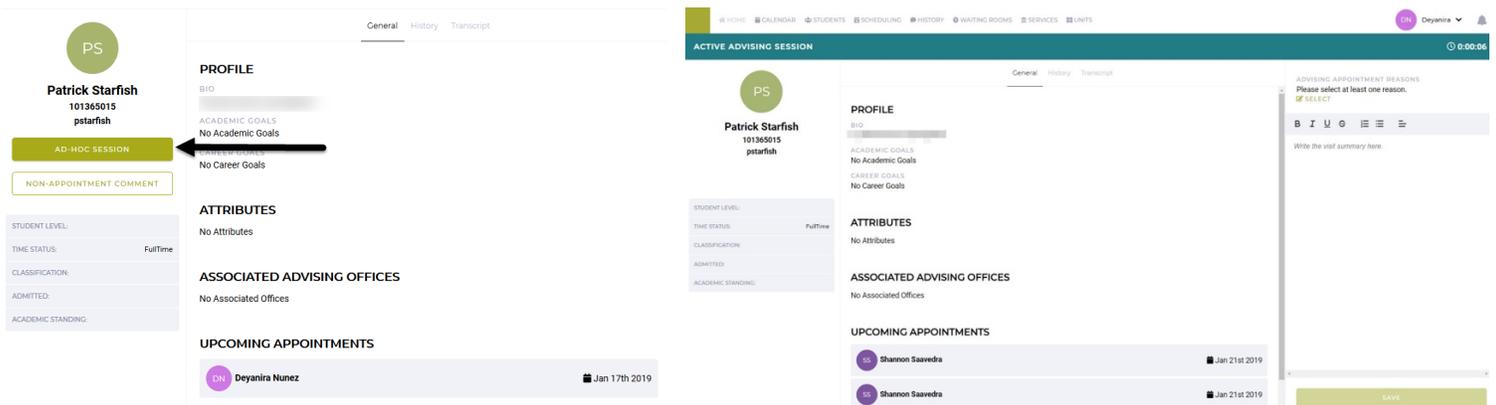
Once you begin an Ad-Hoc Session, the display will be the same to that of a scheduled appointment:

Scheduling Appointments

The **Scheduling** tab allows you, and other individuals in your center, to cancel and schedule student appointments:

Select an advisor and an appropriate time to create a new appointment. You will see to following window pop up:

There will always be a record of who scheduled the student. Once a student appointment is scheduled (either by you or the student) the student will receive a confirmation email. A description is required when scheduling an appointment. This should be used to help describe why the student is seeking advisement.

Click on the "Schedule" button to create the appointment. You will see the following message appear on the bottom right hand corner of your screen:
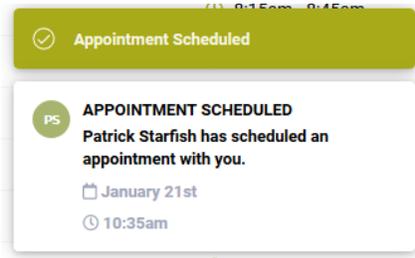
If the appointment you are creating conflicts with another appointment the student created, it will prompt a double-booking error (see image below):
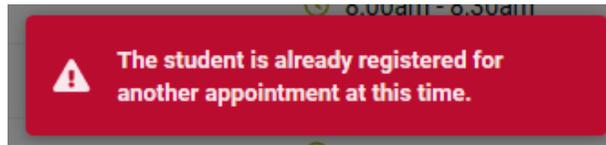
Cancelling Appointments

When you cancel a student's appointment, you will have the option to replace the appointment slot or not. If you choose to replace, this will make the appointment slot available for another student. If you decide not to replace, it will not show as an available appointment option for students.

When cancelling an appointment, you will need to enter a reason for cancelling. To replace the appointment slot being cancelled, click on the "Replace Slot" box and select "Cancel Appointment".

If a student cancels the appointment, the slot will automatically be replaced and made available for another student to schedule.

Role	Description	Training required
Hold updater	Restricted: Limited to advisors in Academic Affairs who are at the college or department level. Allows advisors to place and expire advisement holds.	Securing Private Data Exam, Banner Fundamentals and Navigation Competency Exam, Banner Workshop for Advisors, New Advisor Training, Successful completion of Advisor Portfolio.
Update Student Data	Restricted: Limited to advisors in Academic Affairs who are at the college or department level. Allows advisors to update students majors/minors, load limits, & catalog years; and leave comments if needed.	Securing Private Data Exam, Banner Fundamentals and Navigation Competency Exam, Banner Workshop for Advisors, New Advisor Training, Successful completion of Advisor Portfolio.
LoboWeb Inquiry	Inquiry access to student data via LoboWeb.	Securing Private Data Exam
Student Inquiry	Inquiry access to student data via Internet Native Banner (BANNER) and LoboWeb.	Securing Private Data Exam, Viewing student data webcourse, Banner Fundamentals and Navigation Competency Exam
Department Override Designee	Restricted: Must be selected by your supervisor to perform registration overrides through Banner. In addition to this BAR request you must have your supervisor send an official email to the registrar at: dept_update-l@unm.edu to complete the request.	Banner Fundamentals and Navigation Competency Exam, Securing Private Data – Exam, Department Override Designee Exam
Student Exceptions	RESTRICTED: Limited to identified Advisors who will be submitting the Degree Audit Exception Requests.	LoboTrax Exception, Securing Private Data exam
Pending Graduation Certification	Process degree status information. Access to query academic history.	Banner Fundamentals and Navigation Competency Exam, Securing Private Data - Exam, Posting or Revising Degree Status for Advisors
LoboAchieve	This role is used by staff members who need access to all areas LoboAchieve,	LoboAchieve for Staff, Securing Private Data Exam. In addition to this BAR request you must send an email to: loboachieveinfo@unm.edu with: your UNM ID #, role, and center you need to be added to.
LoboAchieve Inquiry	Access to the LoboAchieve student records system. This role is used by staff members who need access to LoboAchieve, but will not need the ability to create their own availability for students.	Securing Private Data Exam. In addition to this BAR request you must send an email to: loboachieveinfo@unm.edu with: your UNM ID #, role, and center you need to be added to.
LoboAchieve Scheduling	Access to scheduling functions in LoboAchieve. This allows a user to	Securing Private Data Exam, LoboAchieve scheduling exam (found in Learning Central). Limited to LoboAchieve users who will ONLY be using calendaring functions. In addition to this BAR request your supervisor must send an email to: loboachieveinfo@unm.edu with: your UNM ID #, role, and center.
LoboAchieve Faculty	This role is used by faculty members who need access to all areas of LoboAchieve.	Securing Private Data Exam. In addition to this BAR request you must send an email to: loboachieveinfo@unm.edu with: your UNM ID #, role, and center you need to be added to.
Advisor MyReports User	RESTRICTED: Grants access to Advisor and Student reports in MyReports. Must have an advisor job function. If you are a part of a college you will select the MyReports for your college.	FERPA Training for Student MyReports, Student MyReports - General User, Securing Private Data