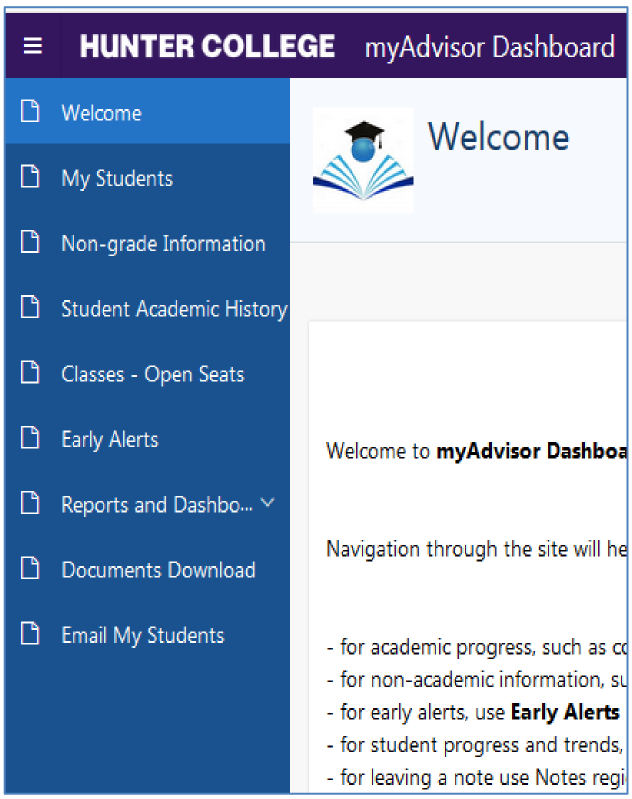
***MyAdvisor** is the case management tool for Academic Unit Advisor to see, and parse, her existing caseload. Advisors can both zoom in to see a detailed profile of a specific student and zoom out to see their entire caseload.*
*MyAdvisor, which is updated multiple times per day with data from CUNYFirst, includes both **academic** and **non-grade information**.*

Both Primary and Academic Unit Advisors will use MyAdvisor as their main case management tool.

First, let's zoom out and take a look at the ways in which you can organize your caseload.

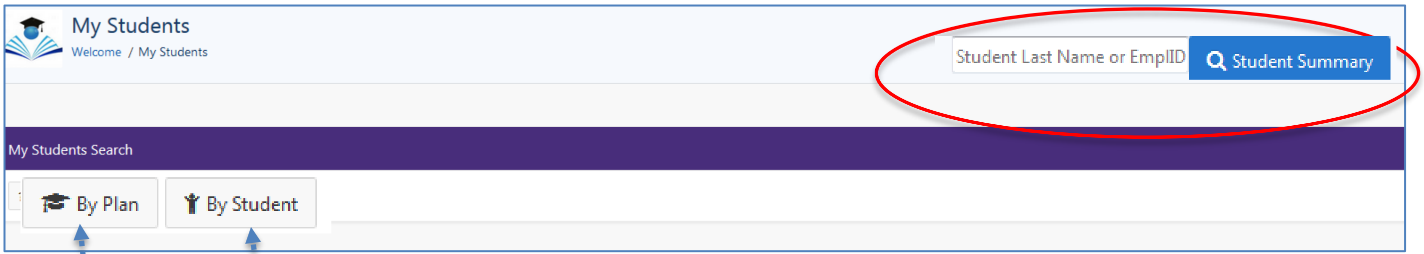
1. When you sign in using your Net ID you'll be taken to the MyAdvisor Dashboard. Go to this address to sign in: www.hunter.cuny.edu/myadvisor

2. Tabs on the welcome screen:



My Students includes **academic information** such as courses enrolled, GPA, admit term, and credits.
Non-grade Information includes non-academic information, such as student groups, holds and service indicators
Student Academic History presents a list of courses students are taking or have taken.
Course Enrollment includes enrollment data for individual courses over several semesters
Early Alerts presents a list of students in your caseload with notices from current instructors with concerns about their course performance.
Reports and Dashboard includes reports on students whose academic records reflect criteria that typically impede degree progress.
Email My Students allows you to send out important information and notifications to students in your caseload

3. Under the **My Students** tab you'll find two options:
   - **By Plan** provides a list of the majors in your advising caseload.
   - **By Student** details information for all students in your caseload regardless of academic plan.

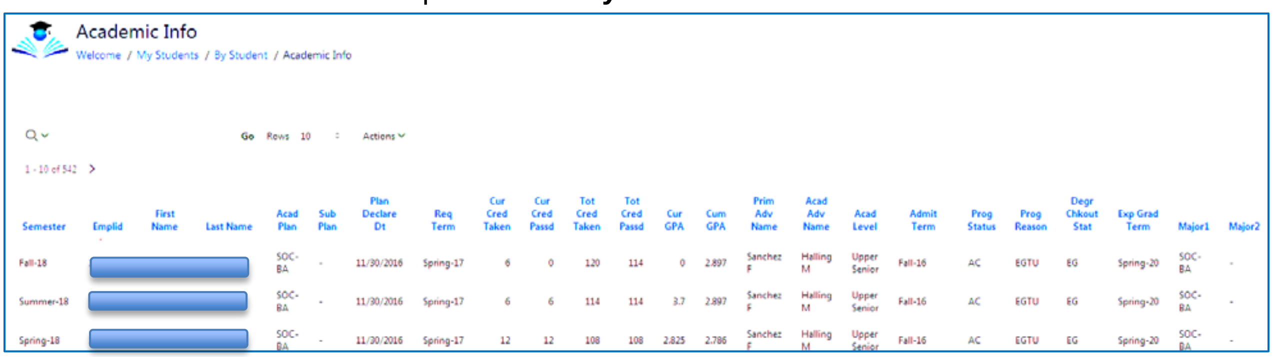


You can also search for the EMPLID or the Last Name of a specific student in the **Student Summary** search bar of the **My Students** or **Welcome** screen. Enter the EMPLID in the circled box in the right hand corner as shown in the image below.

4. Click on the **By Student** button to see a table with information on all your advisees. Click on the **By Plan** button to see a table with information on your students for a given major. *You will only see the majors and names of the students in your caseload.* The information of other students isn't available to Academic Unit Advisors through this system.

Let's see how you can organize your student data.

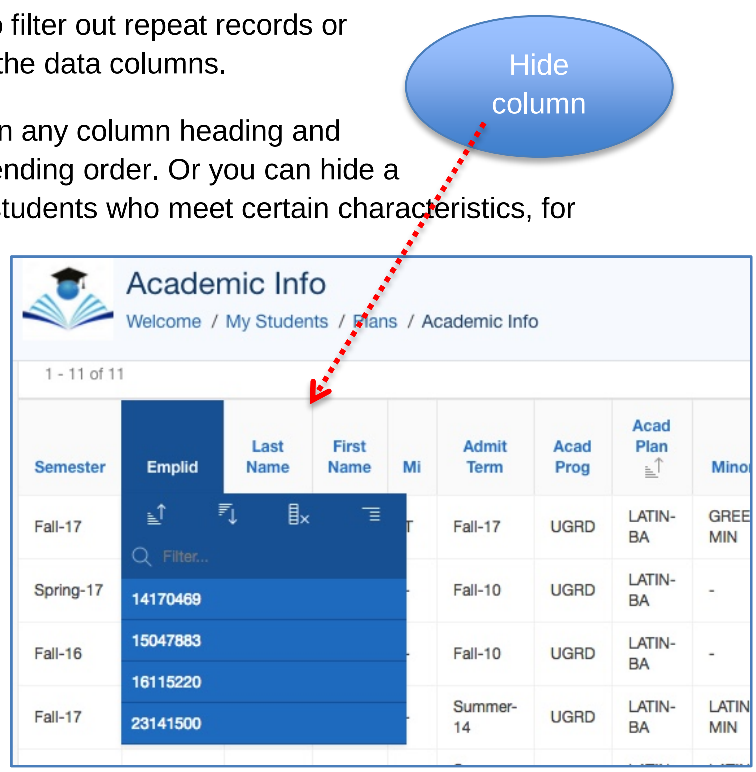
5. A table of your students' information will be loaded into MyAdvisor after you click on the **My Student** button or on one of the plans in the **By Plan** screen.



Here are some important customization tools to filter out repeat records or sort or filter students by selected categories of the data columns.

6. You can rearrange your list by left clicking on any column heading and choosing to sort the data in ascending or descending order. Or you can hide a column. This is helpful if you're looking to find students who meet certain characteristics, for example, newly declared majors.

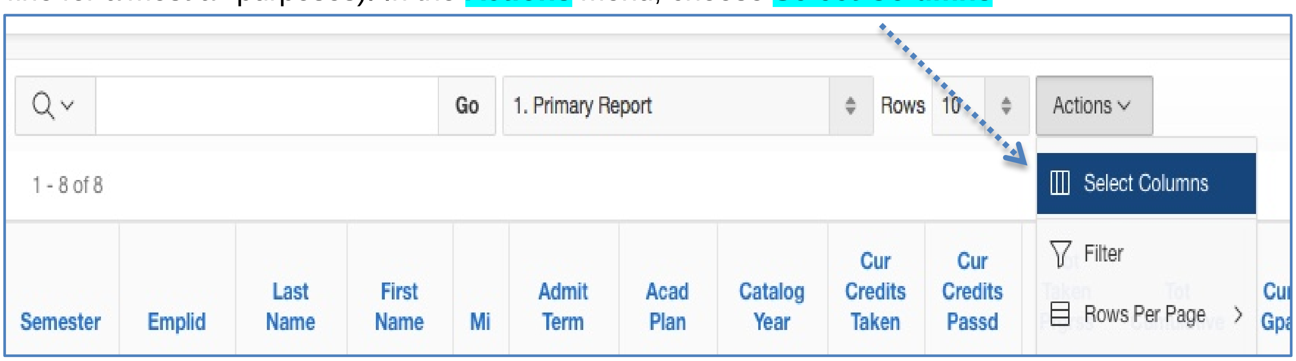
There are several ways to select/filter the students displayed. You can direct enter text, like a last name or an EMPLID. By clicking on the **Looking Glass** at the top of the screen you can select a data column from the drop down menu. You can also click on the **Actions** button and select criteria from the drop down menu to filter your student display. The example that follows will display only the

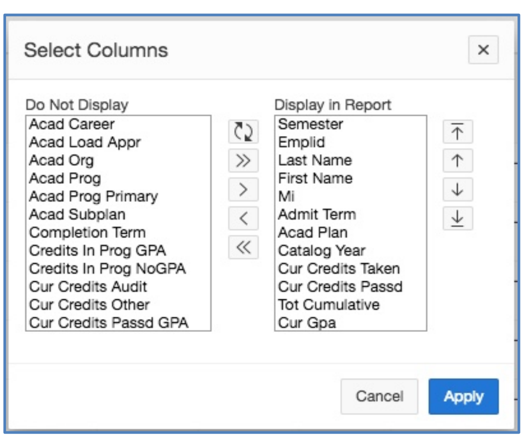


records of students registered for Spring of 2019.

The easiest and recommended method is to click on the **column headings** and then select or search.

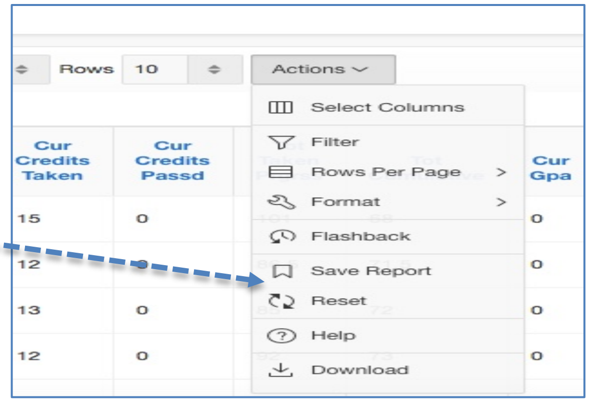
7. You can also choose which columns to display in your table (although the default should be fine for almost all purposes). In the **Actions** menu, choose **Select Columns**





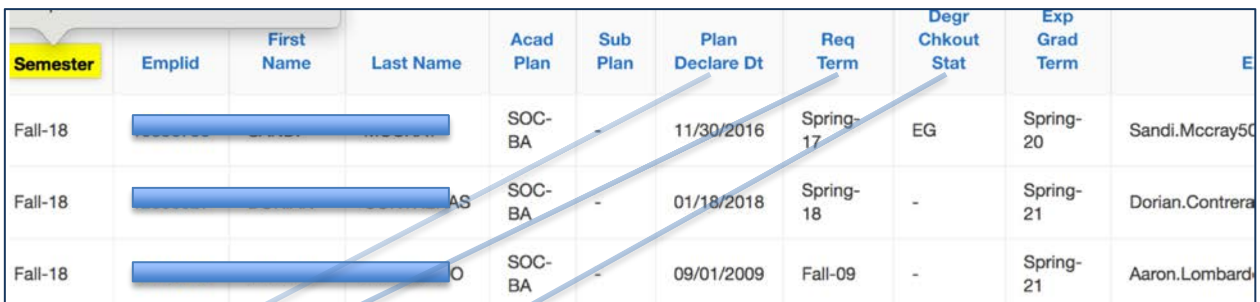
8. Once you choose **Select Columns**, a window will pop up. In the window, you can add or subtract any given data column from display by moving the column from the Do Not Display to Display in Report box. You can also rearrange the columns in the display table by using the arrows on the right side of the window. You must click **Apply** to finalize your actions.

9. Once your display is customized, you can download the report as an excel spreadsheet. Select **Download** from the **Actions** menu. It's the last item on the drop down menu.



10. Once you've downloaded your Excel sheet, you can import your contacts into Acuity. In addition, you can save the downloaded report on your computer for further action.

Important Explanatory Notes on Data Columns



Semester	Emplid	First Name	Last Name	Acad Plan	Sub Plan	Plan Declare Dt	Req Term	Degr Chkout Stat	Exp Grad Term	E
Fall-18	[redacted]			SOC-BA	-	11/30/2016	Spring-17	EG	Spring-20	Sandi.Mccray5(
Fall-18	[redacted]		AS	SOC-BA	-	01/18/2018	Spring-18	-	Spring-21	Dorian.Contrera
Fall-18	[redacted]		O	SOC-BA	-	09/01/2009	Fall-09	-	Spring-21	Aaron.Lombard(

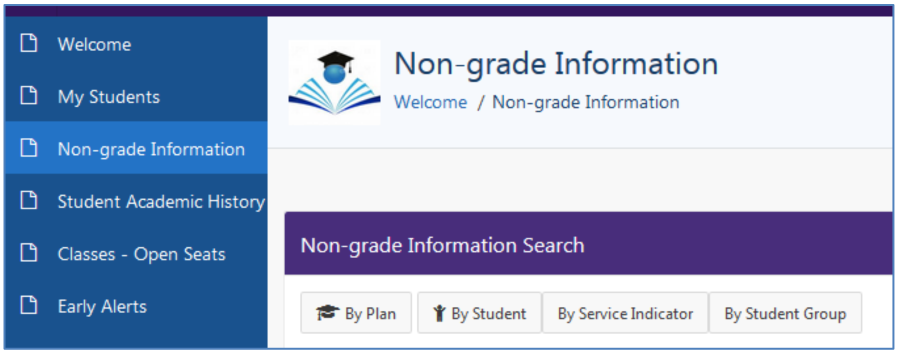
Plan Declare Dt contains the dates each student declared the major.

Req Term contains each student's catalog year for the major.

Degr Chkout Stat contains the status of the graduation application and includes the following possible categories:

"Applied"	Student has applied for graduation but an audit has not yet been processed.
"Approved"	Student is approved for graduation and will be officially awarded the degree either once the official graduation date has been reached or in 1 business day.
"Degree Awarded"	Student is officially graduated for a particular semester.
"Denied"	Due to unresolved issues, student's graduation is denied for a particular semester.
"Eligible to Apply"	Student has the ability to apply for graduation for a particular semester
"Needs to Finish Pending Work"	An audit has been processed on the student's record. The student's audit is OK and will graduate with the successful completion of current term courses/assessments.
"Program In Review"	An audit has been processed on the student's record. The student's audit has issues that will affect the student's graduation if not resolved by the date of graduation.
"Withdrawn"	Student/Department has withdrawn student's application for graduation. Student will need to reapply for graduation.

11. You can also search for students in the **Non-grade information** menu. There are four categories you can select from to display students: **Plan, Student, Service Indicator** and **Student Group.** (For **Plan** and **Student** see above.)



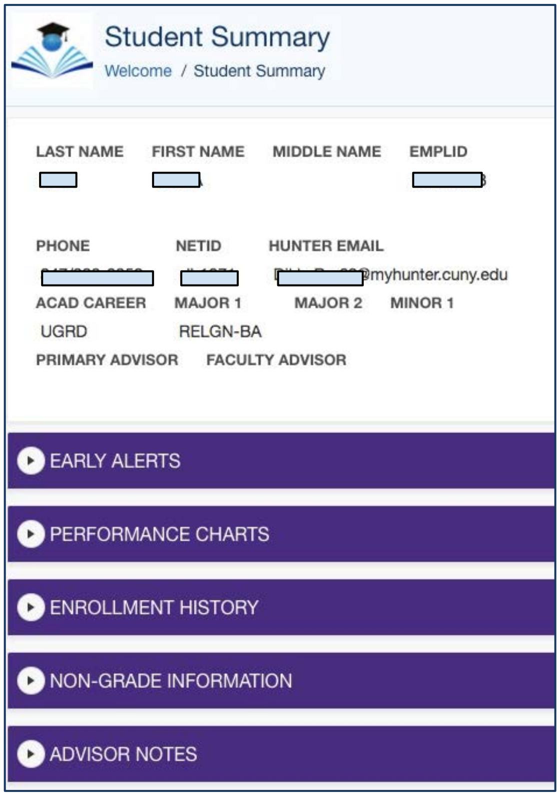
12. Below are important Service Indicators for Academic Unit Advisors:

DOS	Dean of Students
BUR	Bursar Hold
LIB	Library Hold
REG	Registrar's Office
EIE	Enough is Enough
DIS	Academic Dismissal
MMR	Missing Immunization
FIN	Financial Aid Hold

For more information, see the addendum in the handbook.

EXPLORING DETAILED INFORMATION ON AN INDIVIDUAL STUDENT

13. When you CLICK on a student's EMPL ID in the By Student report screen, the **Student Summary** page for the selected student will be displayed. This includes administrative information as well as five drop down categories.

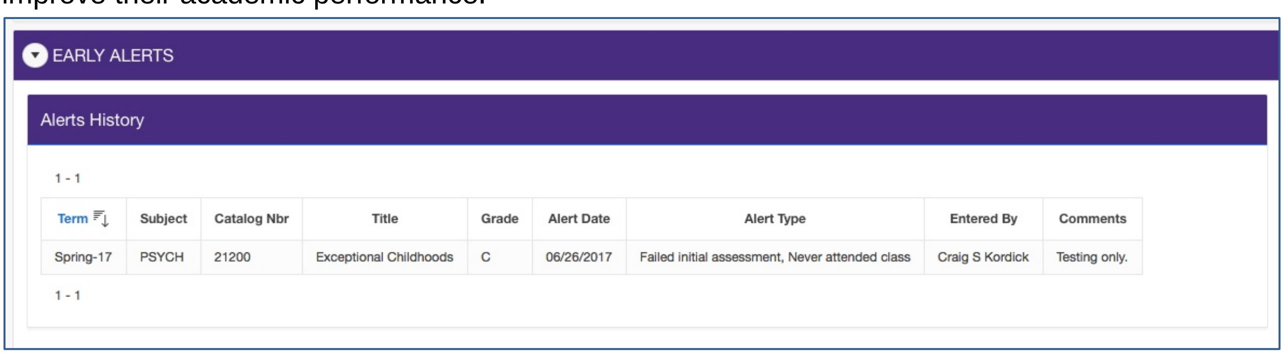


Early Alerts are notices instructors send to a student to alert her and her advisors to actions/inactions that jeopardize the student's success in the course. A complete list of students with **Early Alerts** can be accessed by going to the **Early Alerts** tab on the left of the Dashboard.
Performance Charts displays two graphs: a GPA trend and accumulated credits.
Enrollment History provides a breakdown of a student's performance and course history by semester.
Non-Grade Information displays information on student groups, holds and degree application.
Advisor Notes should contain notes about student-advisor meetings. The notes entered by the advisor in this tab follow the student and are visible only to advisors. To facilitate continued meaningful interactions with your students enter a note in this tab to document the major take-aways of your conversation with a student.

14. **Early Alerts** are notices instructors send to students who have engaged in behaviors early on in the semester that jeopardize course performance. The categories of alerts include

- "Inadequate course engagement" for students who are insufficiently engaged in class, e.g. non-participation in lab or discussion.
- "Unsatisfactory performance on class assignments(s)" for students who have poor performance on quizzes, problem sets, etc.
- Referrals to a Learning Center or other office.

All instructors have access to send an Early Alert before the midterm. Advisors are expected to engage students in conversations about their alerts and to give students specific directions to improve their academic performance.


EARLY ALERTS

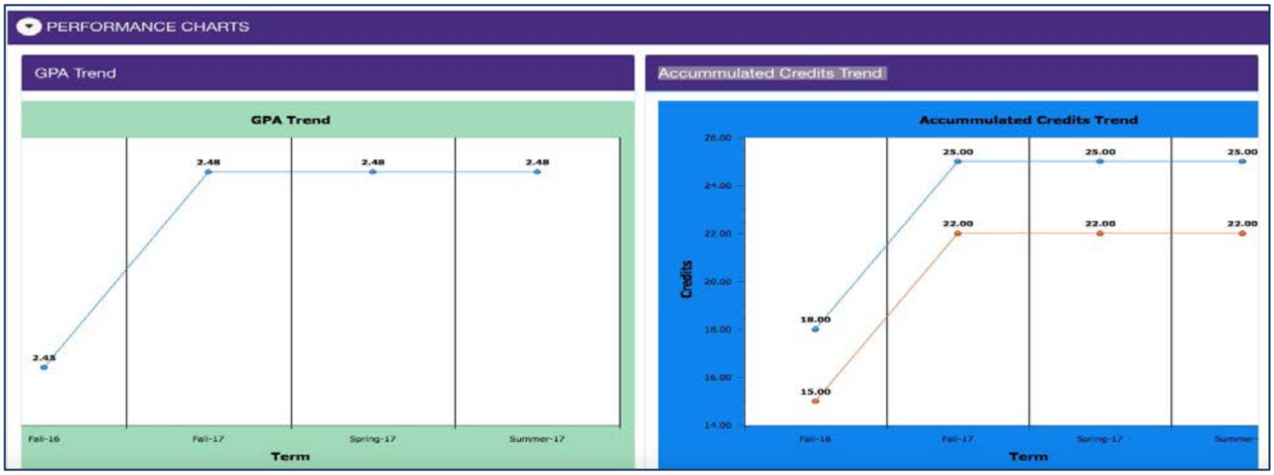
Alerts History

1 - 1

Term	Subject	Catalog Nbr	Title	Grade	Alert Date	Alert Type	Entered By	Comments
Spring-17	PSYCH	21200	Exceptional Childhoods	C	06/26/2017	Failed initial assessment, Never attended class	Craig S Kordick	Testing only.

1 - 1

15. **Performance Charts** include two graphs: a GPA and Accumulated Credits trend line. The graphs allow advisors to see a student's academic performance and degree progress at a glance.



16. Enrollment History is a breakdown of a student's performance (Credit History) and courses (Course History) by semester.

A. Credit History

Unt Passd Prgrss	Tot Taken Prgrss	Tot Passd Prgrss	Acad Plan	Declare Dt
0	107	88	PSYCH-BA	2016-01-20
0	94	88	PSYCH-BA	2016-01-20
7	91	88	PSYCH-BA	2016-01-20
6	84	81	PSYCH-BA	2016-01-20

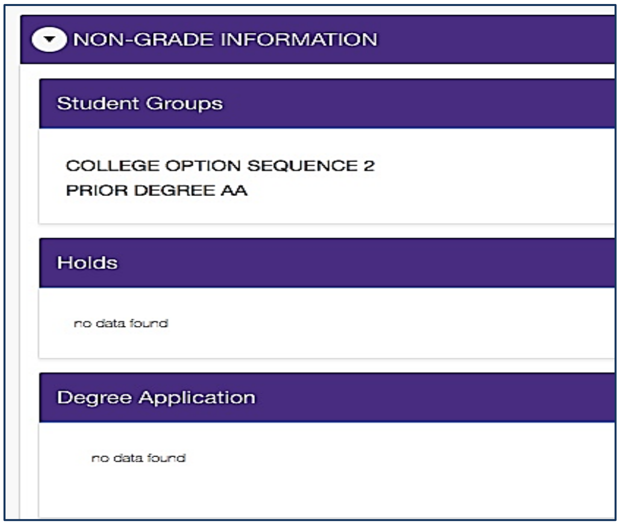
B. Course History (Transcript)

Course History

row(s) 1 - 15 of 21 Next

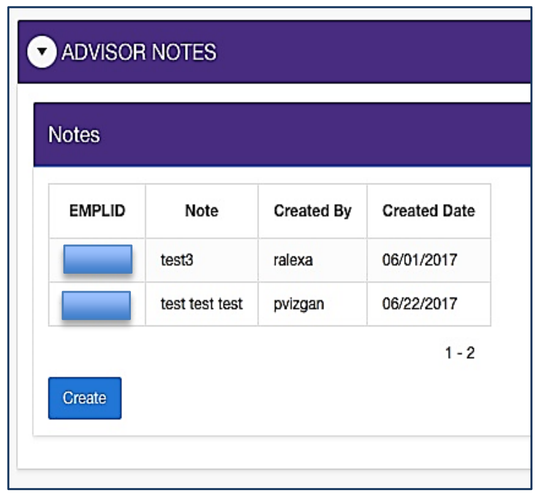
Term	Subject	Catalog Nbr	Grade	Descript
Fall-17	AFPRL	10200	-	Latino Communities in US
Fall-17	PSYCH	25000	-	Genrl Experimental
Fall-17	PSYCH	22000	-	Personality
Fall-17	PSYCH	24200	-	Health Psych
Summer-17	PSYCH	23000	-	Social Psych
Spring-17	PSYCH	21200	C	Exceptional Childhoods
Spring-17	PSYCH	24800	-	Stat Method in Psy
Spring-17	PSYCH	24800	B	Stat Method in Psy
Fall-16	PSYCH	22500	B+	Ethol -Anml Behav
Fall-16	WGS	10000	B-	Intro Gender/Sex Studies

TIP: You can use the transcript and course history together to get a sense of a student's progress toward graduation. These reports are presorted by semester.



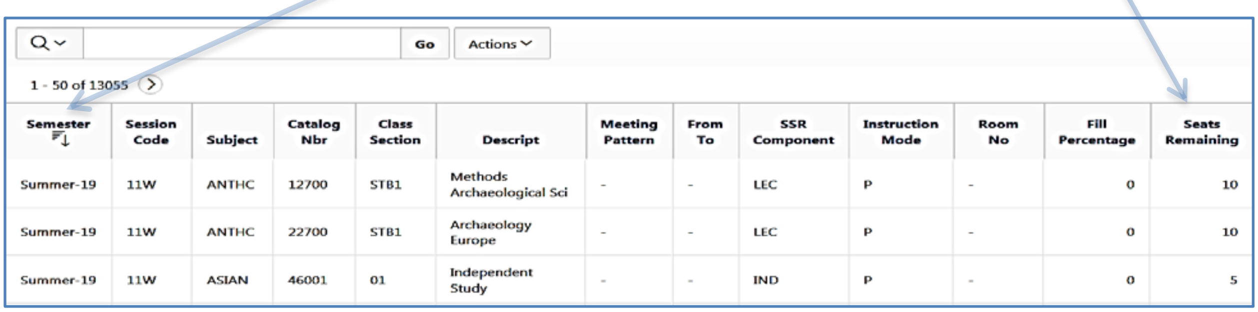
15. **Non-Grade Information** includes Student Groups, Holds, and Degree Application Information.

16. **Advisor Notes** should reflect important information on your meetings with a student, for example, plans for internships, postgraduate work, study abroad etc.… Enter notes on conversation you have with the students on courses to be completed or requirements in DegreeWorks. Students do not typically have access to notes in MyAdvisor. Students see all notes in DegreeWorks and so they will have a record of your course advice.



COURSE ENROLLMENT DATA

17. When you select **Classes – Open Seats** from the menu bar, a list of courses is displayed. You can filter the displayed courses by **semester**. This allows you to see what courses have **seats remaining** so that you can give students recommendations on courses with open seats.

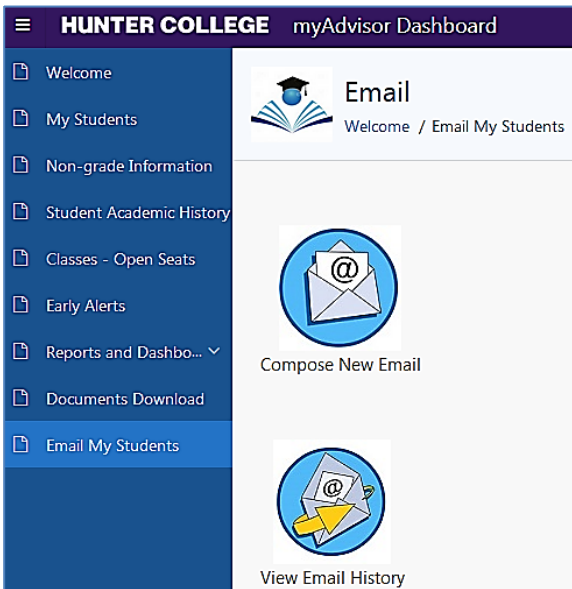


Semester	Session Code	Subject	Catalog Nbr	Class Section	Descript	Meeting Pattern	From To	SSR Component	Instruction Mode	Room No	Fill Percentage	Seats Remaining
Summer-19	11W	ANTHC	12700	STB1	Methods Archaeological Sci	-	-	LEC	P	-	0	10
Summer-19	11W	ANTHC	22700	STB1	Archaeology Europe	-	-	LEC	P	-	0	10
Summer-19	11W	ASIAN	46001	01	Independent Study	-	-	IND	P	-	0	5

COMMUNICATING WITH STUDENTS

18. **Email My Students** enables you to email all, a subset, or only one of your assigned students. Using this module, you can communicate important information to groups of students about issues or events that apply to them. You can also include primary advisors or others in the email.

A. When you click on **Email My Students** in the menu bar, the **Email Welcome** window appears. In this window, you can create a new e-mail message or filter to select an existing message.



To create a new email, click on **Compose New Email**.

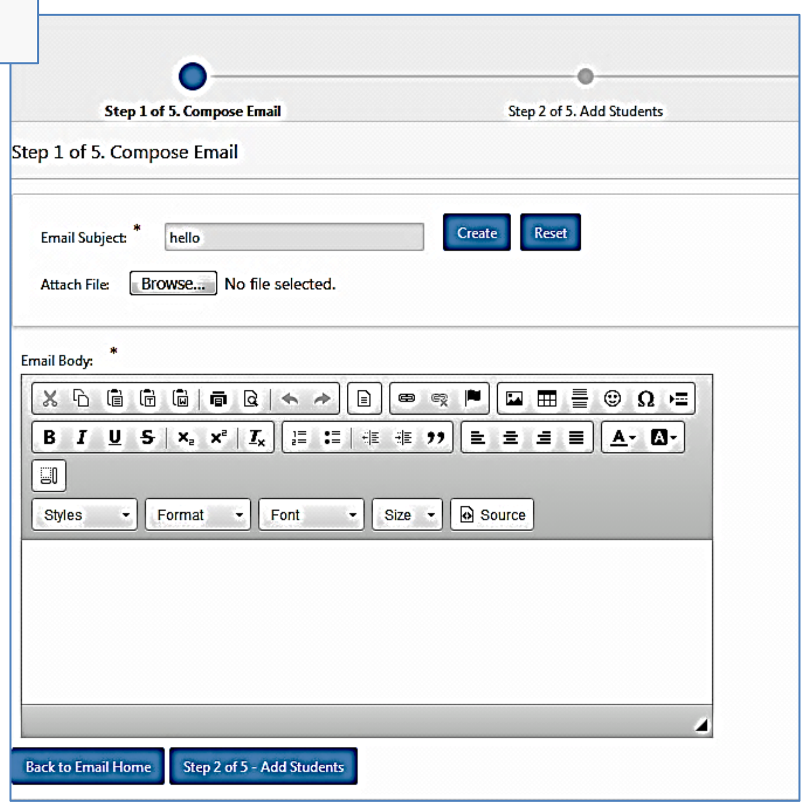
To view the previous emails you sent, select **View Email History**. This function will allow you to view and resend an email that was sent.

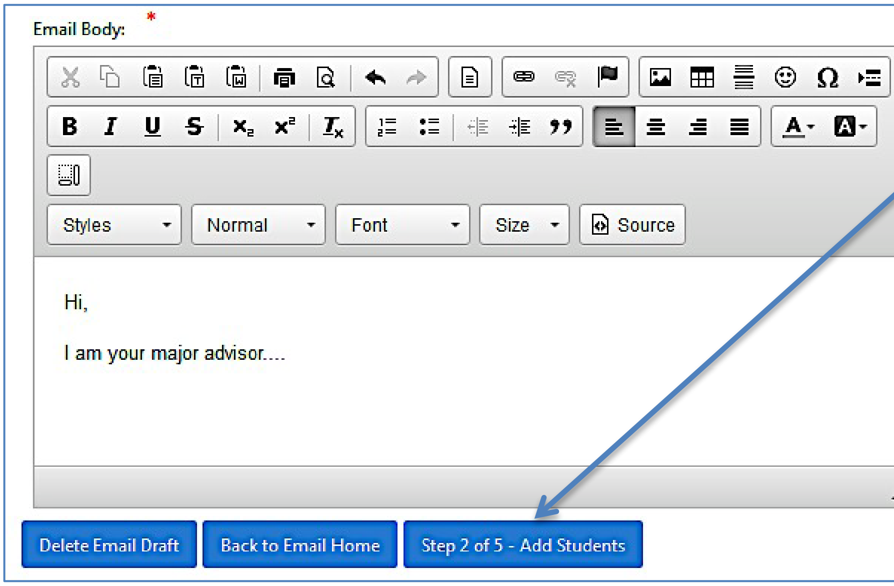
B. When you select **Compose New Email**, **Step 1 of 5** will pop-up. In this window, enter an email subject and text for the email in the boxes as indicated.

The **Reset** button clears all text you typed into in the subject and body of your email.

Click **Create** to save what you have written so that you can continue editing it now or at another time.

In the Email Body, you can edit the text using the editing buttons.



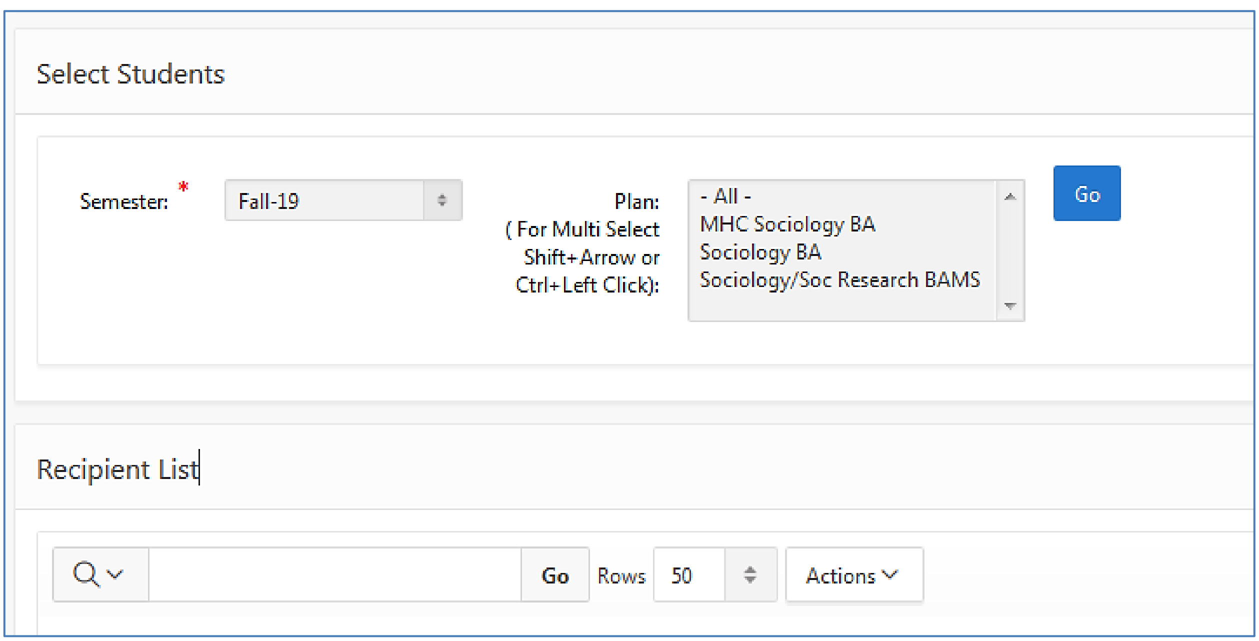


C. Once you are satisfied with the text of the email, you can select Step 2 and **Add Students** you want to receive your email.

If you select **Back to Email**, the email will be saved and you will be back at the Email Welcome Screen. The email draft will be available in the **View Email History** screen.

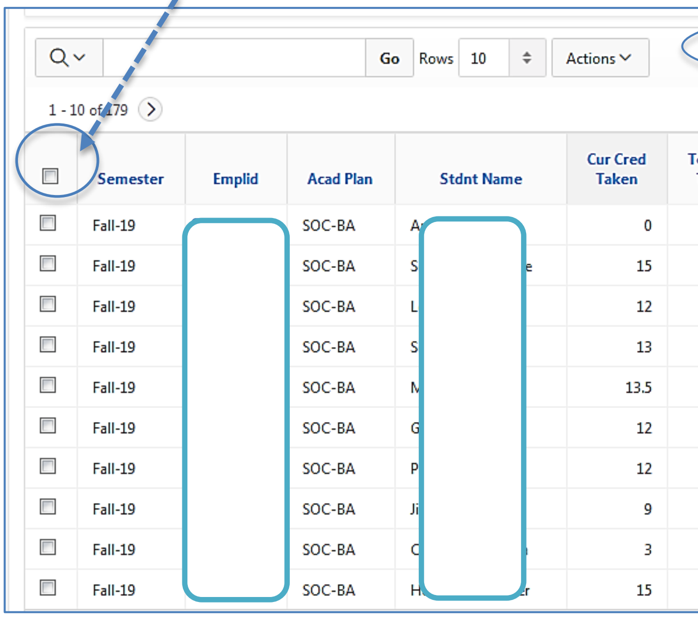
D. To select the email recipients from your student caseload, you must first filter the criteria you want to use to select the email recipients.

a. In the **Select Students** screen, click on the **semester** caseload you want to email (current semester is preselected), and then click on the **academic plan you want to email**.



Click **Go** to display a list of all the students in your caseload.

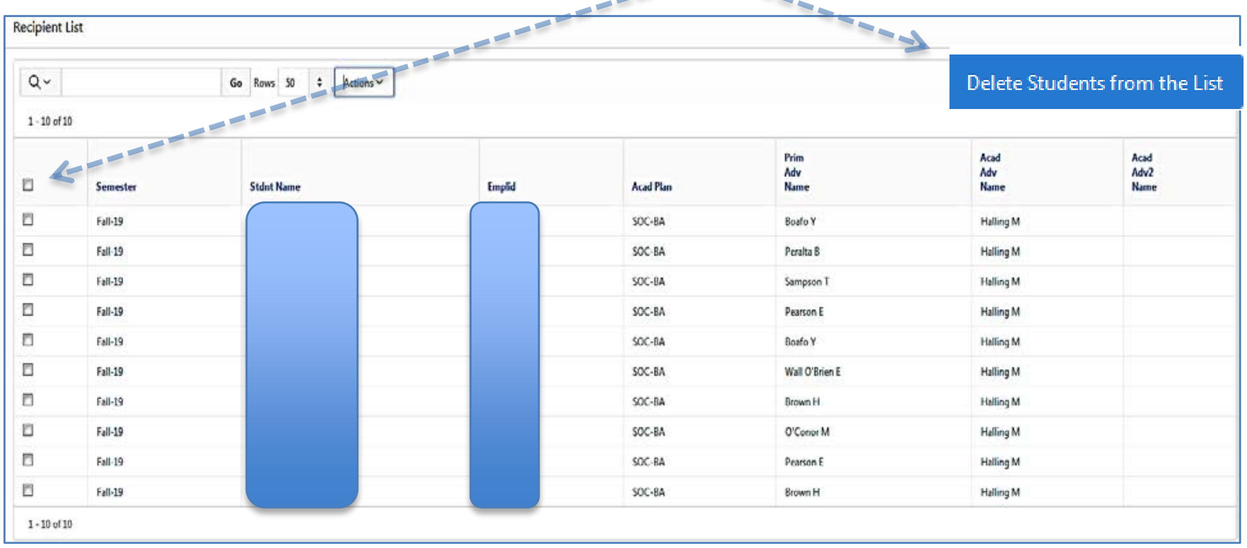
b. To email all the students listed for the semester, click the box on the uppermost left corner of the Select Students window. To select a subset of students as recipients, click on the box next to an individual student or filter by available criteria.



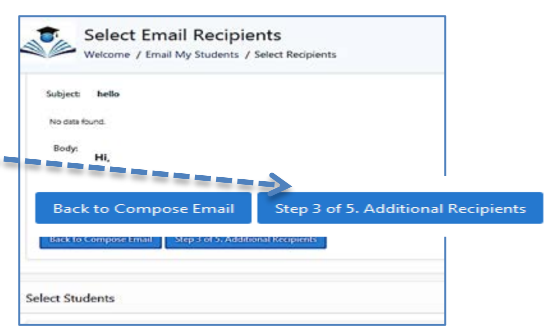
c. To select criteria to filter the student recipients, click on the **magnifying glass**, then click **Actions** and click on filter in the drop down menu to select students by criteria. You can also perform other actions such as downloading your report or saving the report in the **Actions** drop down menu. For more information on selecting students by specific criteria see pages 2 - 4 of this guide.

d. Once you have selected/checked-off the students you want to email, click the **Add Students to the List** button.

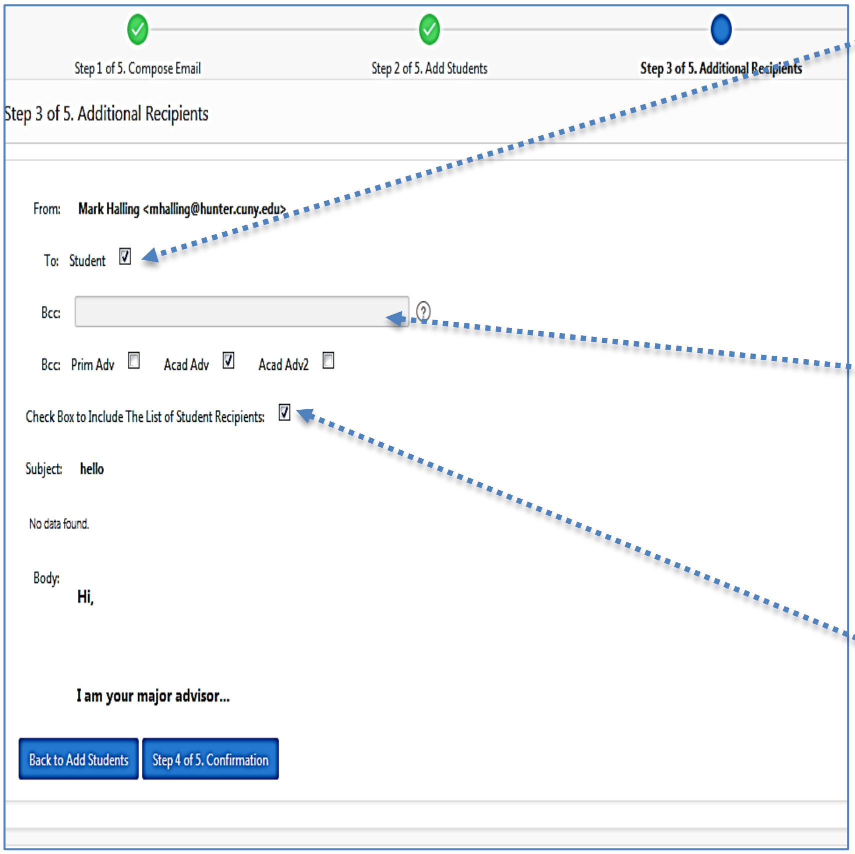
e. The selected students will appear on the **Recipient List** screen. You will also receive a green box alert indicating you successfully added the students. You can remove students from the recipient list by checking the box next to the student you no longer want to email and then click on the **Delete Students form the List** button.



f. When you are ready to go the next step, click on the Step 3 button found in the Select Email Recipients box. Next, you can add additional recipients including other advisors.



E. In the next step, **Step 3**, you will choose the other recipients you want to receive the email.



1. The **To** field is automatically populated with the recipient as <u>Student</u> and the check box is checked. This is the default setting. If the box is checked, the student(s) you select will receive the email.

2. The **Bcc** entry field allows you to send a blind copy of the email to any recipient who is not a set contact on *MyAdvisor*, e.g. chair of the department or the Dean's office.

3. If the box next to **recipient list** is checked, you will receive an email with a list of student email recipients.

TIP: If you uncheck the **To** Student box, the email wi<u>ll NOT be sent</u> to students; only the addresses selected or entered in the BCC field will receive the email.

F. When you select 

, you will be directed to once more review the email text and list of recipients before sending.

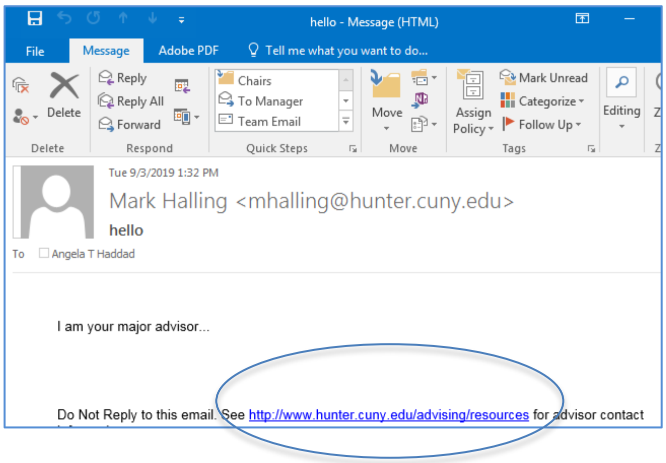
You can go back to **Add Additional Recipients** and make changes to the text or even remove students form the recipient list.

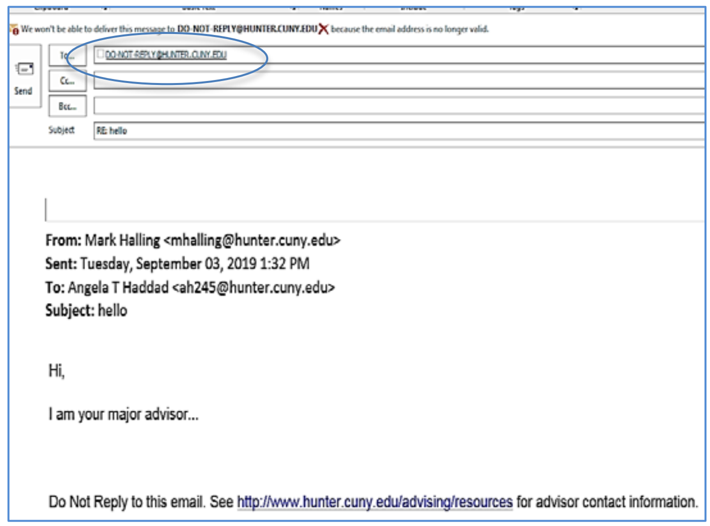
When you are satisfied with the email and the list of recipients click Send in the Confirm Email Before Sending Screen**.**

<u>TIP</u>: If you want to send the email out first to your BCC list uncheck the **TO** Student box.

G. You sent the email, now what?

a. Students who receive your email will not be able to see the names of other recipients. The students' email will include an automatic message informing students *not to reply* to the email to contact the sender. The email will include a link to the advisors' contact information page. Finally, an automatic redirect address of DO-NOT-REPLY@hunter.cuny.edu will appear if the student does try to reply.





2. Once the email has been sent, the **Email History Log** screen will appear.

You will be able to:

i. See the email status "*sent*" or draft.

ii. **Resend or revise** an email by clicking on the desired email in the status column.

iii. The email history can be filtered by status, subject, content, and created date.