Personal

Resource &

Education

Plan

Training Manual

STUDENT SUCCESS PLAN TRAINING MANUAL 2.6

CONTENTS OF THIS TRAINING MANUAL HAVE BEEN PROVIDED BY THE FOLLOWING:

MAY 2015

VERSION 2.0
JASON ELWOOD
RUSS LITTLE
SARAH OHLSEN
HARSHINI YEDIDA
KRISTI SHORT

VERSION 2.3
RUSS LITTLE
JASON ELWOOD

VERSION 2.4
JASON ELWOOD

VERSION 2.5
JASON ELWOOD

VERSION 2.6
JASON ELWOOD

REVISED BY JC/TAACCCT GRANT TEAM, SEPTEMBER 2016

Table of Contents

Introduction

About Personal Resource & Education Plan (PREP)

The Personal Resource & Education Plan (PREP) supports a holistic coaching and advising model that expedites proactive interventions for students in need. PREP is designed to improve retention, academic performance, persistence, graduation rates, and time to degree completion. Through coaching, web-based support systems, and proactive intervention techniques, students are identified, supported, and monitored. PREP can be used with any targeted populations of students (e.g. first year students, students needing developmental education, students on academic probation, student athletes, or traditional students). PREP provides a number of tools that will help support these students. The primary tools included in PREP are the following: Student Intake Assessment, Action Plan, Journal, Reference Guide, and Early Alert. PREP also collects data on the services that can be used to continuously improve upon the types of services you offer. Overall, PREP is a multi-tiered system with strong security controls to allow many different college roles to work with the student while maintaining student privacy.

What PREP Means to Students

PREP provides students with a personalized map to their academic and career success. Students can use PREP as their connection to resources and their personal planning. They can use it in collaboration with Navigators/Advisors and independently, gaining access to personal, academic, and career resources, as well as a customized map to their degree completion.

Getting Started

Security: PREP User Roles & Confidentiality

Security has been incorporated into PREP in order to provide or restrict access to tools and student information as appropriate. Application of security exists for portlets, tools, pages and entries. Security in PREP is divided into two separate functional areas: roles and confidentiality levels.

Roles: PREP users are assigned to one or more roles that grant access to functionality and tools within the application. There are eight roles that are considered standard. Administrators assign specific Roles to users upon account creation.

1. **Navigator/Advisor:** Navigator/Advisor is a general term that refers to an individual who provides services to a student within PREP. Examples of Navigator/Advisor include, but are not limited to, academic or faculty advisors, counsellors, disability services, or student success Navigator/Advisor.

2. **Student:** Student users have the ability to access a separate PREP interface and interact with their record in PREP. The student interface is referred to as "MyGPS."

3. **Support Staff:** Support staff provides assistance to Navigator/Advisor and managers in PREP. They have limited access to PREP tools. The default would allow support staff to view the main tool fields and student intake.

4. **Faculty:** Non-advising faculty members utilize PREP primarily to create early alerts for students in their classes, but could use reporting features to view a student main profile, intake form, or MAP. If a faculty member is also an advisor they would need to be assigned a faculty and Navigator/Advisor role.

5. **MAP Template Admin:** Anonymous (public) templates can only be created by Administrators and any Navigator/Advisor or manager assigned the MAP Template Admin role. The role is assigned in combination of Navigator/Advisor or manager.

6. **Manager:** Managers provide similar services as Navigator/Advisor and have additional access to Reports and Caseload Reassignment. This is typically intended for a department manager or supervisor and above.

7. **Administrator:** The PREP administrator is responsible for configuring the application with values and options. This role has access to almost everything and can log in and impersonate other roles in order to troubleshoot issues and verify role access.

8. **Developer:** The developer has the highest level of access to PREP and maintains the file and database configurations.

 Confidentiality Levels: While the assigned role determines the available portlets and tools to which the user will have access, individual student records and tasks within these tools are secured by Confidentiality Levels.

For example, navigators, advisors, and counsellors are all given the Confidentiality Level of "Navigator," while Disability Support Staff are given the Confidentiality Level of "Disability." As such, "Navigators" do not see all of the information available to "Disability." Below are a few examples of confidentiality levels that can help determine what items a user can or cannot see.

> ### *Confidentiality Levels:*
> ·   Everyone (Default - Visible to anyone with access)
> ·   Tutor (Visible to Tutors, Faculty, Navigators, and Disability Support Services)
> ·   Faculty (Visible to Faculty, Navigators, and Disability Support Services)
> ·   Navigator (Visible to Navigators and Disability Support Services)
> ·   Disability (Visible to Disability Support Services ONLY)

QUICK TIP: Before assigning roles and confidentiality levels to individual users you may want to consider the following questions:
- *To which tools will the user need access in the system? (Roles)*
- *Will the data entry from the user contain sensitive information that should be viewed only by employees within the same role, or will the data entry from the user contain sensitive information that should be viewed by only a select group of employees with appropriate permission? (Roles & Confidentiality Levels)*
- *Will the user need access to print or download reports? (Roles)*
- *Should the user be granted access to add or edit existing users? (Roles)*

Nancy Navigator and Tommy Tutor are both working with Stephen Student in PREP.

- Nancy Navigator meets with Stephen Student and learns he has a disability. She creates case notes on Stephen's account and specifies the "Disability" Confidentiality Level.
- Tommy Tutor cannot see these notes, because he does not have access to the Case Notes tool.
- Faculty and other Navigators have access to the tool and all of Stephen Student's notes, but do not see this note, because they do not have the "Disability" Confidentiality Level.
- Only Nancy Navigator and Disability Support staff have access to this particular note, thanks to a combination of Role and Confidentiality Level security.

Logging In & Logging Out of the System

Login
1. Open an Internet browser and navigate to: **https://prep.jeffco.edu**
2. Enter your login details (same as MyJeffco account) and select "Login".

Logout

1. Located in the top right corner is an icon of a person with a down arrow (See screen capture above).
2. Click on the down arrow.
3. Select Sign Out.

Getting Around PREP

What you see when you log in depends on the role you have been assigned in PREP. For the purpose of this manual, we will include all options and note where there are differences.

Screen Layout and Controls

When you log in, you see your home screen. Below is a screen capture of what you will see along with the description of the each main section.
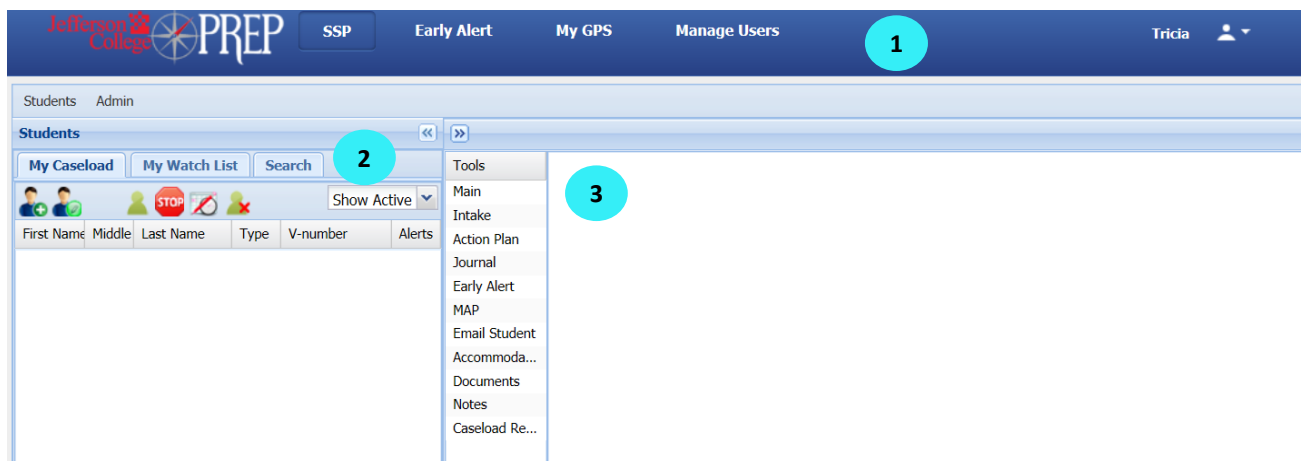
1. **Main Navigation Buttons**: These direct you to other functional areas within PREP. The buttons you see are related to the role you are logged into. For example, only admin roles have a "Manage User" button.
2. **Student Search and Caseload:** The section to the left allows you to search for students, add students to PREP, and see students in your caseload. If active students are assigned to you, they will appear in your caseload at login. Students with active early alerts will be highlighted in red. Students with an appointment recorded in the system for today will be highlighted in yellow.
3. **Student Record:** If a student is highlighted on the left, their information will appear in the large tool area on the right. At login the "Main" tool and "Dashboard" tab will be selected, giving you a snapshot of information (discussed below). The tool and tab you are viewing will be highlighted.
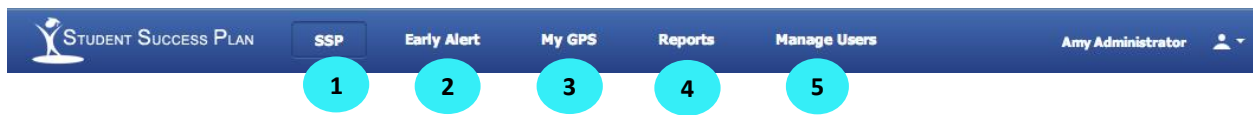
Main Navigation Buttons

The navigation buttons you see depend on your role in PREP. You will only be able to see the areas that are relevant to your role.


1. **SSP:** This tab is the main functional area used to conduct your typical day to day work. Many coaches only have access to this button. This tab houses all the tools your institution has decided to implement.
2. **Early Alert:** This functional area is typically for a faculty member who has the ability to send an early alert about a student. This is not the location an advisor would use to address and respond to early alerts.
3. **My GPS:** This is the student interface of PREP. This interface is available to all PREP authenticated and unauthenticated users as defined by your institution. Students are directed to MyGPS by default when logging into PREP.
4. **Reports:** This section takes you to the reports available in PREP and allows view and run reports. This is only available to managers and administrators by default.
5. **Manage Users:** This tab allows an administrator or developer to search for users, review and assign permissions, and impersonate a user. It also provides information on access permissions.

Managing Students in My Caseload and My Watch List

There are two quick lists of students in PREP. My Caseload contains a list of students assigned to the current user. Caseloads can only be assigned to the Coach role. Users with the appropriate permissions to create a Watch List may add any student, regardless of coach/caseload assignment, to a Watch List. Any student can be added to user's Watch List for quick selection. Additionally, automated e-mails sent to the assigned Coach will also be sent to watcher. The Watch List feature is available to Coaches and Managers by default.

For both My Caseload and My Watch List, the available actions described below are available.
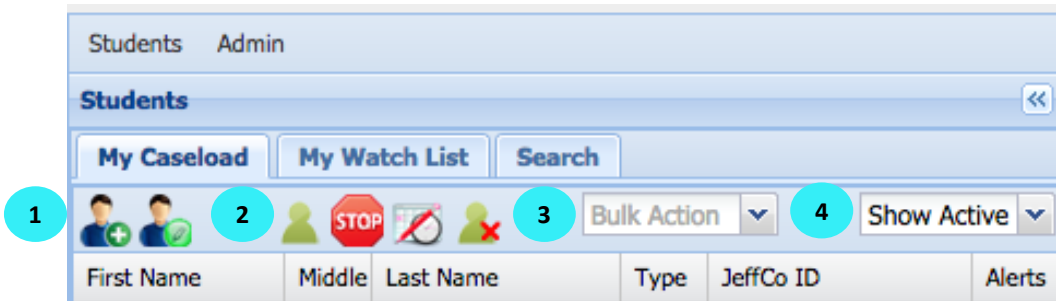
1. **Add and Edit Students:** adding new students in PREP or editing existing students are accomplished in Caseload Assignment
    a. **Add:** students that only exist in external data can be added to PREP
2. **Change Program Status:** the Program Status for individual students can be set
    a. **Set Active:** the student is actively engaged in PREP activities
    b. **Set Non-Participating:** the student previously engaged but does no longer
    c. **Set No-Show:** the student never engaged in PREP activities
    d. **Set Inactive:** the student is no longer active, generally used for graduation or transfer
       **Note: The delete feature was removed and replaced with the Set to Inactive action
3. **Bulk Action:** For any list of students accessed by My Caseload, My Watch List or Search, actions can be applied to the entire list of students. This aids in performing the same action on multiple students
    a. **Export to CSV:** the basic person record for the students in the list are exported and downloaded to a CSV file on the local computer.
    b. **E-mail Students:** the e-mail student form with options for recipients, Confidentiality Level, subject and body is used to create the e-mail message sent to all students in the list.
    c. **Set Active Status:** assigns the active status to all students in the list
    d. **Set Inactive Status:** assigns the inactive status to all students in the list
    e. **Set Non-Participating Status:** assigns the non-participating status to all students in the list
    f. **Set No-Show Status:** assigns the no-show status to all students in the list
    g. **Watch:** adds all the students in the list to Watch List
    h. **Unwatch:** removes all students from the Watch List
4. **Filtering by Student "Program Status":** This box allows you to view your caseload based on a student's program status. At login, "Show Active" is the default status. You can sort your caseload by any of the statuses listed below by selecting them from the drop down menu and then clicking the caseload button (#2 –Retrieve my caseload).
    a. **Show All:** Displays the entire list regardless of Program Status
    b. **Show Active (default):** This is your active caseload.
    c. **Show Inactive:** This status is assigned to a student who has not been seen or registered for classes.
    d. **Show Non-Participating:** This status is for students who were once active but have not participated.
    e. **Show No-Show:** This status is assigned to a student who did not attend his/her first appointment and is a no-show after repeated attempts by the coach to contact. These students are identified as having received no services.
    f. **Show Transitioned:** When students' transition, they have successfully completed the process that has entered them into PREP. A student can transition from one program and then become active again when he/she enters another. For example a high school dual credit student who receives his/her diploma or GED may transition; however, if he/she enrolls as a new college student, he/she could become active in another program.

       **QUICK TIP: You can use program status to pro-actively filter students to contact. For example, in slower months, you can reach out to all inactive, non-participating, or no-show students.

Searching for Students

1. **Student Search** The tools searches all students already added to PREP and those that can be added that only exist in external data. When you click on this button (display search filters), you will see two areas – 1) a search box with several options as shown in the screen capture below and 2) a list that displays details of students from your search results.

   You can search with <u>one or more of the following criteria</u>:
   a. **My Plans** – By checking the "My Plans" box, you can search students for whom you created a saved MAP plan.
   b. **My Watches** – Students in the current user's Watch List
   c. **My Caseload** - Checking the "My Caseload" box will allow you to find a student in your caseload based on the any of the above search criteria.
   d. **School ID -** Search by the student ID
   e. **First (Name)** - Search by a student's first name
   f. **Last (Name)** - Search by a student's last name
   g. **Student Exists In -** Search by student added to PREP, in external data or both
   h. **DOB** – Date of birth, needs to be exact
   i. **Program Status** - Search by "Program Status" to retrieve students who have been assigned a certain program status.
   j. **Registered** - Search for students by current registration status (registered/not registered for the current term).
   k. **Special Service Group** – Search by Special Service Groups assigned to students
   l. **Declared Major** – Search by "Declared Major" to retrieve a list of students in a designated program.
   m. **Assigned Coach** - Search by "Assigned Coach" to see the students who are assigned to that coach.

n. **Early Alert Status** – Search for students with an Early Alert with an overdue response.
o. **FA SAP Status** - Search for students by "Satisfactory Academic Progress" status for the status codes defined for the system.
p. **Plan Status** - Search for students through their MAP plan status (On/Off).
q. **Plan Exists** – Search for students that do or do not have a Plan
r. **Hours Earned** - Search for students by specifying a range of credit hours earned.
s. **GPA** - Search for students within a specific cumulative GPA range.

Use the "Reset" button to clear the search criteria and search with new information.

**Open searching with various search criteria will help you determine if a student is currently in the system or identify a student who is not on your caseload.

From the student search results, the same action available in My Caseload and My Watch List are available, except for the filter by Program Status.

2. **Students List:** Regardless of search type, all results will be listed below the search tab in the caseload area. The information you will see will vary based on the type of search.
    a. Locating students via My Caseload and My Watch List will display the following fields:
        i. First Name
        ii. MI (middle initial)
        iii. Last Name
        iv. Student Type - This is selected when entering a student. Definitions of student types will be discussed when we "Add a Student."
        v. Student ID number
        vi. Alerts - If you are using the early alert feature and there are current alerts, the student will show up in red. The total number of alerts issued for a student will be indicated.
    b. Locating students via Search will display the following fields:
        i. First Name
        ii. MI (middle initial)
        iii. Last Name
        iv. Coach - The individual to whom the student is currently assigned.
        v. Student ID Number
        vi. Program Status (Active, Inactive, etc.)
        vii. Alerts - If you are using the early alert feature and there are current alerts, the student will show up in red. The total number of alerts issued for a student will be indicated.

Add a Student

There are three methods students are added to PREP:

1. **Early Alert:** Any student that hasn't already been added and receives and Early Alert will automatically be added.
2. **Add Action:** students can be added via the Add button and searching for a student ID.

3. **Quick Add Action**: students in a search result that have not been added can be added by confirming the coach and student type assignment in external data.

Before adding a student, ensure the student is not already in the system. To check whether a student is in the system, conduct an open search on the student's ID number or other identifying information. If you attempt to add a student who is already in the PREP system, the current record for the student will be loaded into Caseload Assignment to edit the student information.

Add Action

** A complete student record consists of multiple fields and tabs. However, to add a student quickly, you only need their student ID to retrieve the required data from the external database tables. If any of the data is not retrieved, only the name, student ID, username, Navigator/Advisor, and student type are required to complete the form.
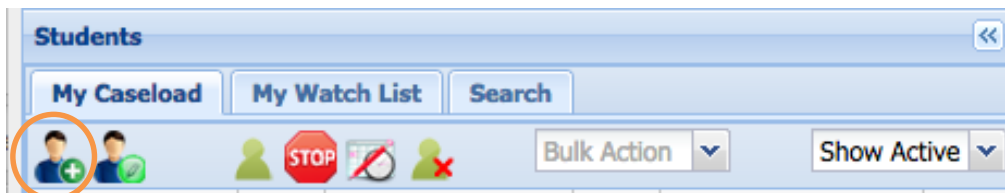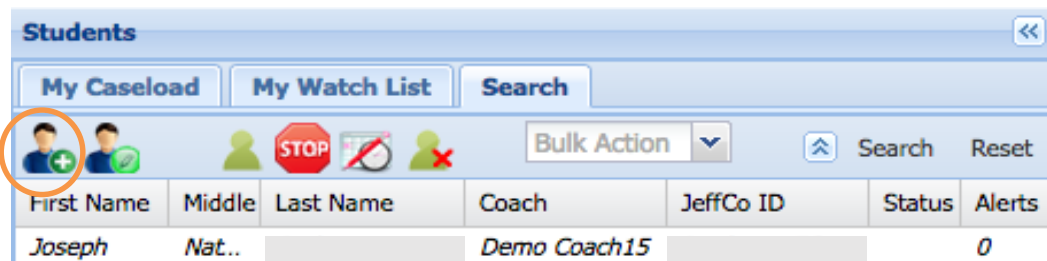

1. Click the icon with a plus circled above. You will see a number of fields and tabs that can be completed for a comprehensive record. The required fields are denoted with a red asterisk (*).

2. In the student tab, in the "Student ID" field, enter the student's ID number. When you do this, the button "Find" will be bolded. Selecting this button will auto populate the fields from your external data (e.g. Banner, the database that has been synced with PREP).
   a. If the student's ID number is not in the school's larger system, you will receive an error message, "Student Not Found".
   b. If the system auto populates all the required fields, you can hit save at this time.
   c. If you hit save and all the required fields are not completed, you will receive a confirmation, "Student Information successfully updated".

3. Fill out the Navigator/Advisor assignment and the student type (these may be "sync'd" from the external system and may not be able to be entered). The student can only be assigned one student type. Student types are created and defined by your institution and should be mutually exclusive. For the purpose of this demonstration we have selected 6 standard types of students:
    a. **EAL** - A student who has an early alert submitted by a faculty member, but has not been previously entered into PREP.
    b. **First-Time Student** - A student enrolling in college for the first time.
    c. **H.S. Student** - A student currently in high school (participating in dual enrollment courses).
    d. **Non-Degree seeking student** - a student who wishes to take courses but not earn a degree, diploma, or certificate with the institution.
    e. **Returning Student** - A student who has previously been enrolled with this institution.
    f. **Transfer Student** - A student who has taken college courses from another institution.
4. Each student type has been configured by the functional admin, to either require an appointment with a Navigator/Advisor or not require an appointment. When the student type is selected, if an appointment is not required, the red * will disappear from the appointment date, start time, and end time. With the completion of this step, you have filled out the required information.
5. If you select the box titled "Send Student Intake," an e-mail with a link to the intake will be sent to the student's e-mail address on file (typically the school e-mail address unless you have entered an alternative e-mail address).
6. For a complete record that allows you to run detailed reports, it is important to select options within the remaining tabs. There are four additional tabs.
    a. **Special Service Groups:** The institution or your department will determine what groups of students they want to collect data on or track. A student can be assigned to multiple groups. For example you may track students who have two or more developmental education courses, athletes, transfer students, scholarship students, students in a certain program, students in honors, or students on academic probation/warning. You could also track a student by cohort (e.g. Fall 2013, Spring 2014) when you put a new initiative in place.
    b. **Referral Sources:** Referral sources indicate how a student was brought to a coach. Many schools may not need to enter a referral source as all students receive services with PREP.
    c. **Reasons for Service:** Reasons for service are unique to the student and help you further parse out data when tracking groups. Multiple reasons can be associated with a student. Reasons for service may include first generation in college, works full time, low test scores, etc.
    d. **Ability to Benefit/Anticipated Start Date:** Ability to Benefit is used to designate students who have not received a High School diploma or GED.
    e. **Anticipated Start Date:** Anticipated start date is used to indicate when the student anticipates he/she will start at the institution. This field can be used to track cohorts of students who started in a program or at the institution during a particular term.

Quick Add

The Quick Add function simplifies that add process by reducing the form and making the action available in the search results. Students that have not been added to PREP will appear in italics in the search results.

Selecting a student will initiate the Quick Add form that only requires entry/confirmation of the coach and student type.

Edit a Student

When you edit a student's record, you are taken to the Caseload Assignment screens described in "Add a Student." Please see this section for details on how to fill out the information.

There are two ways to edit a student's Caseload Assignment:
1. When a student record is selected on the left side of the screen, clicking on the person icon with the pencil (circled in the screen shot) above the list of students will bring you to the edit feature for the student you are currently viewing.
2. When you click on the "Edit" icon on the right side of the screen you will enter the edit feature for the student that you are currently viewing.

QUICK TIP: The ways to edit a student are helpful when you are in any PREP tool other than the "Main" feature. When you click on another tool (e.g. MAP, Intake, etc.) the student search section will collapse to maximize your room to work. At this point the easiest selection would be the "Edit" link. Similarly, at any time you can collapse the right side of the tool to see a larger view of the student search. Here you would find it simpler to use the icon "Edit" feature.

E-mail, Coach and Coaching History

E-mail, Coach and Coaching History are quick links related to the student record you have selected.
1. **E-mail** – This links allows you to e-mail the student. The e-mail is sent from PREP and can optionally be recorded as a Journal entry.
2. **Coach** - This link allows you to quickly e-mail the coach assigned to a student.
3. **Coaching History** - The entire coaching history of the student can be downloaded by clicking on this link. The Coaching History PDF will display a summary of information displayed in the Main Tool and all journal entries, action tasks and Early Alerts created for a student.

Selecting a Student Record

To select a student record, click on any student within the list of students located on the left side of the screen. If you do not see the student you are looking for, consider other search options mentioned previously.

PREP Tools

The tools your institution has selected to use are located on the left side of the "Student Record." The "Main" tool is required to maneuver the system. The remaining tools are optional. For this training, we will review all tools and their features, each in its own chapter. To move from one tool to another in the system, click on the tool name in the list on the left of the screen. When you click on a tool, the student search section is collapsed to provide more room to use the tool.


1. **Main:** When you log in to PREP the default tool is "Main."

2. **Intake:** This tool takes you to the student's responses to the student intake assessment. If the student did not take the assessment, you can complete it with them, or just discuss the challenges. The section on challenges is useful for creating action plans.
3. **Action Plan:** This is where the coach creates and monitors a student's action plan. Resources can be reviewed in this section. A student can also access their action plan in MyGPS.
4. **Journal:** This is where a coach creates and reviews case notes and records the student's progress throughout a program with a defined step by step process. Journal notes can be used to monitor the progress of a student toward his/her educational goal.
5. **Early Alert:** This tool is where coaches can review and respond to a student's alerts.
6. **MAP:** This is where a coach will create, edit and monitor a student's MAP (**M**y **A**cademic **P**lan).
7. **Accommodation:** This is where a disability service professional could track a student's request for accommodations and the accommodations provided to the student.
8. **Documents:** The Student Documents tool allows PREP users to store and note relevant documents within PREP. The documents are available for other PREP users to view and provide information to coaches and advisors.
9. **Notes:** This is a tool provides a read only access to review notes or remarks on a given student collected from another system. The notes tool does not provide any editing capability.

Main

This feature provides a vast amount of information to a coach, counselor, or academic advisor. There are 8 tabs of information available in the "Main" tool. The information in the "Main" tool is populated from the institution's external data. It is important to note that PREP is a read only application and does not apply any calculations or interpretations to the data that is loaded in the external tables.
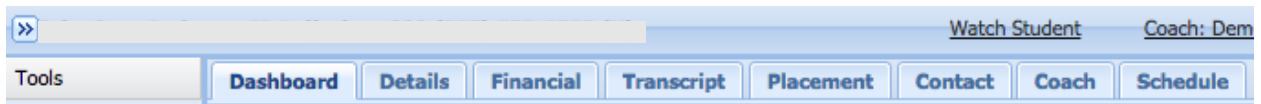
Dashboard Tab

The dashboard displays the information that can be seen in the "Main" tool and when you log into PREP. The dashboard provides comprehensive case management information for the selected student.

***QUICK TIP: Some information on the dashboard can be edited by clicking the "Edit" icon in the top right corner (circled below). Clicking on the "Edit" link will take you back to the Caseload Assignment screen to make your edits.**

The information in the Main tool is organized into two rows of data.

1. **Basic Student Information**: This section provides a basic snapshot of personal information for the student, including contact information. This section includes:
    a. A student photograph, if available
    b. DOB (date of birth)
    c. E-mail
    d. Student Type
    e. Program Status
    f. Academic Program
    g. Plan Name
    h. Plane Owner
    i. Service Reasons
    j. Service Groups
    k. Referral Sources

QUICK TIP: If you want to add a service group, reason or referral source, click the pencil (circled below) or the "Edit" link in the right corner and select the relevant service groups and/or reasons for service. When this information is updated, it will appear like the screen capture below.

2. **Student Success Indicators:** Each of the success indicators displays an evaluated status of the existing data for the student. Implementers have full control of which indicators are displayed, the associated text and the color indicator. As data in PREP and the external tables change, the evaluation is updated and displayed in real-time in the dashboard.
    a. Student Indicators
        i. **GPA**: the cumulative grade point average
        ii. **Registered**: the current and future term registration status
        iii. **Comp Rate**: the overall completion rate
        iv. **Standing**: the academic standing
        v. **SAP**: the financial aid satisfactory academic progress

13

vi. **R**estrictions: any restrictions placed on the student
   b.   Intervention Indicators
       i.   **Intake:** the existence of a completed intake date
       ii. **Open Alerts:** the number of open and total Early Alerts
       iii. **Open Tasks:** the number of open and total tasks
       iv. **MAP:** the plan status of the student's active plan
   c.   Risk Indicators
       i.   Risk indicators are derived completely from external data specifically configured for the Risk Indicators

Details Tab

This section provides more detailed demographic and academic information than the Dashboard screen. The Details section adds an academic component, and removes information regarding PREP history, service groups, and service reasons.

The Details include three sections of data for the selected student.

1.   Demographic and Academic
     a.   Gender
     b.   Marital Status
     c.   Ethnicity
     d.   Race
     e.   Residency
     f.   F1 – yes or no (International Student – F1 Visa)
     g.   Standing
     h.   Restrictions
     i.   Academic Pro0gram
     j.   Intended Program
     k.   Start Term

l. Anticipated Start Term
        m. Transfer Hours
    2. Cumulative and Term Activity
        a. Cumulative: the overall completion, attempted hours, earned hours and GPA.
        b. Term: for each term for which the student has completed or registered, the attempted, earned, GPA and paid status are displayed.
    3. MAP
        a. Plan Program: the program associated with the plan, if exists
        b. Plan Catalog Year: the catalog year associated with the plan, if exists
        c. Plan Status: the calculated or supplied status of the plan
        d. Plan Name: the title of the plan
        e. Plan Owner: the user who created the plan
        f. Plan Updated: the last updated date
        g. Plan Ends: the last term on the plan with planned courses

Financial Tab

The transcript tab separates the financial details of payment and Financial Aid. The details include three sections.

| Dashboard | Details | Financial | Transcript | Placement | Contact | Coach | Schedule |

Financial Aid and Loan Information

Balance: $0.00
FA GPA: 2.44
FAFSA: 08/24/2014
FA File: PENDING
FA Amount: $53.00
FA Remaining Terms: 7
Institutional Loan Amount: $6,000.00
Loan Amount: $3,850.00
SAP Code: SAP_PROB (SAP_PROBAT)
SAP Description: SAP Probation

Financial Aid Awarded

Term	Accepted
FA2014	Accepted
SP2014	Accepted

Financial Aid File Status

File Code	File Name	File Description	File Status
SAP_PROB			PENDING

    1. Financial Aid and Load Information
        a. Balance: the overall balance owed
        b. FA GPA: an alternate GPA for financial aid purposes
        c. FAFSA: the date of the most recent FAFSA
        d. FA File: the overall status of require financial aid files
        e. FA Amount: the amount of financial aid
        f. FA Remaining Terms: the calculated number of remaining terms of eligibility
        g. SAP Code: the current SAP code
        h. SAP Description: the description of the SAP code
    2. Financial Aid Awarded: for each term the student was offered a financial aid package, the acceptance status can be displayed.
        a. Term: the term detail
        b. Accepted: the acceptance status

3. Financial Aid File Status: for each of the required files, the status of each file can be displayed.
   a. File Code: the code for the required file
   b. File Name: the name of the required file
   c. File Description: the description of the required file
   d. File Status: the status of the required file

Transcript Tab

The transcript tab lists all the courses a student has taken. This information can be viewed in a number of ways by clicking on the column of interest, clicking on the down arrow, and then selecting to sort by "Ascending" or "Descending."

Dashboard	Details	Transcript	Placement	Contact	Coach	Schedule		
Term	Course ▲	Course Title		Cr Hrs	Grade		Credit Type	
SP13	BUS101	Business		3	B		Proficiency	
SP13	ENG101	English		3	B		Proficiency	
SP13	MTH101	Mathematics		3	A		Proficiency	
SP13	PSY101	Psychology		3	C		Proficiency	

Placement Tab

This section provides information regarding the student's placement tests. This information can be viewed in a number of ways by clicking on the column of interest, clicking on the down arrow, and then selecting to sort by "Ascending" or "Descending."

Dashboard	Details	Transcript	Placement	Contact	Coach	Schedule
Type		Score	Status	Date	Outcome	
Scholastic Assessment Test ...		2386	Accepted	01/01/2012	Take ENGL 102	
American College Testing C...		26	Accepted	01/01/2012		

Contact Tab

This page has contact information for the student. Unlike many standard management systems, PREP allows the student to provide an alternate address. This is useful for students who are local but are taking online classes while physically located somewhere else (e.g., military personnel). In these situations, the college would not want to change the permanent address but needs to know the temporary address to help facilitate testing, for example.

Dashboard	Details	Transcript	Placement	Contact	Coach	Schedule

Mailing Address
Non-local:
Address:

Alternate Address
Edit
In Use: No
Address:

Home Phone:
Mobile Phone:
School Official:
Secondary:
DOB: 01/01/1992

Coach Tab

This gives information regarding the assigned coach for this student. It provides:
1. A photo of the coach, if available.
2. The assigned coach's name and contact information.
3. The date of the most recent activity with the coach and the service provided.
4. Most recent activity for the student through MyGPS.

Schedule Tab

The "Schedule" tab provides the current schedule of the student. This information can be viewed in a number of ways by clicking on the column of interest, clicking on the down arrow, and then selecting to sort by "Ascending" or "Descending." Below is the screenshot of the Schedule tool.

Intake Assessment

As mentioned above in "Adding a Student," a link to an intake assessment configured by your institution can be e-mailed to a student prior to the first coaching session. If a student has completed this assessment, you can view this information by clicking on the "Intake Tool."

QUICK TIP: If the student omitted information or wants to change their selections, you can make the changes in the fields. Hit "Save" to capture the new information.

Once you are in the intake tool, you will see 8 tabs. This is what the student sees as they complete their self-assessment. Below are screen captures for each tab.

Personal Tab

This provides basic student information, much of which is auto populated from external data. Fields populated from external data are marked with the sync'd label and are disabled from editing.

Demographics Tab

This section contains basic demographic information for the student and asks questions about childcare and employment. Some of this information is already available and synced with your external data. If these fields are available in your external data they will be populated here and the field will appear grayed out.

EduPlan Tab

This section provides a few questions that address a student's education status, previous grades, family college experience (first generation college student), and whether the student needs special accommodations.

○ F
○ D-F
○ D
○ C-D
○ C
○ B-C
○ B
◉ A-B
○ A

1-What grade did you physically earn at
Your highest level of education:

○ Yes
◉ No
1-Special needs or require special
accommodations:

○ Yes
◉ No
1-Have your parents obtained a college
degree:

Select One ⌄
1-Student Status:

| Personal Info * | Demo Info | Tab-EduPlan | Tab-EduLevel | Tab-EduGoal | Tab-Funding | Tab-Challenges | Tab-Completed Items |

EduLevel Tab

This section is solely to determine highest level of education previously completed.

| Personal Info * | Demo Info | Tab-EduPlan | Tab-EduLevel | Tab-EduGoal | Tab-Funding | Tab-Challenges | Tab-Completed Items |

Check All   Clear All

1-Education level completed: Select all that apply
☑ Attending High School

☐ College Degree - 2 Year

☐ College Degree - 4 Year

☐ GED

☐ High School Graduation

☐ No Diploma/No GED

☐ Other

☑ Some College Credits

1-Last Year Attended: 2014

EduGoal Tab

This section asks questions regarding the student's educational and career goals.

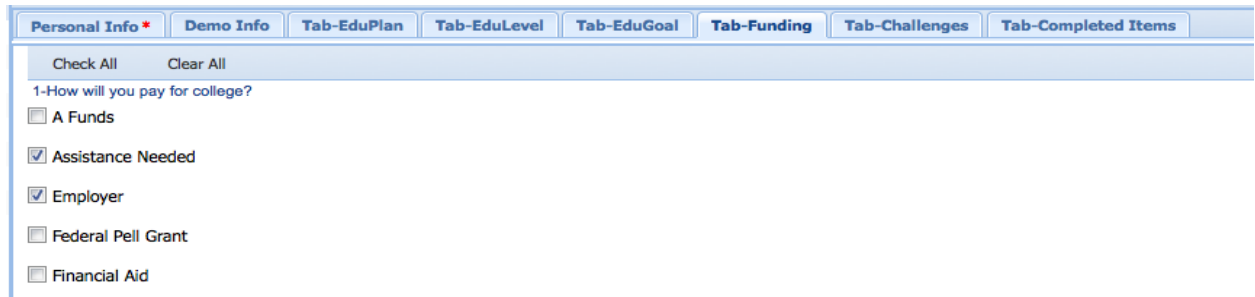| Personal Info * | Demo Info | Tab-EduPlan | Tab-EduLevel | Tab-EduGoal | Tab-Funding | Tab-Challenges | Tab-Completed Items |

1-Education/Career Goal: ◉ Associates Degree
○ Bachelor
○ Certificate
○ Military
○ Other
○ Short Term Certificate
○ Tech School
○ Uncertain
○ Workforce

1-What is your planned major?: Aerospace

1-How sure are you about your   ○ Very Unsure
major?:   ◉
    ○

19

Funding Tab

This section focuses on how a student plans to fund his/her college education. (Entirely Editable)
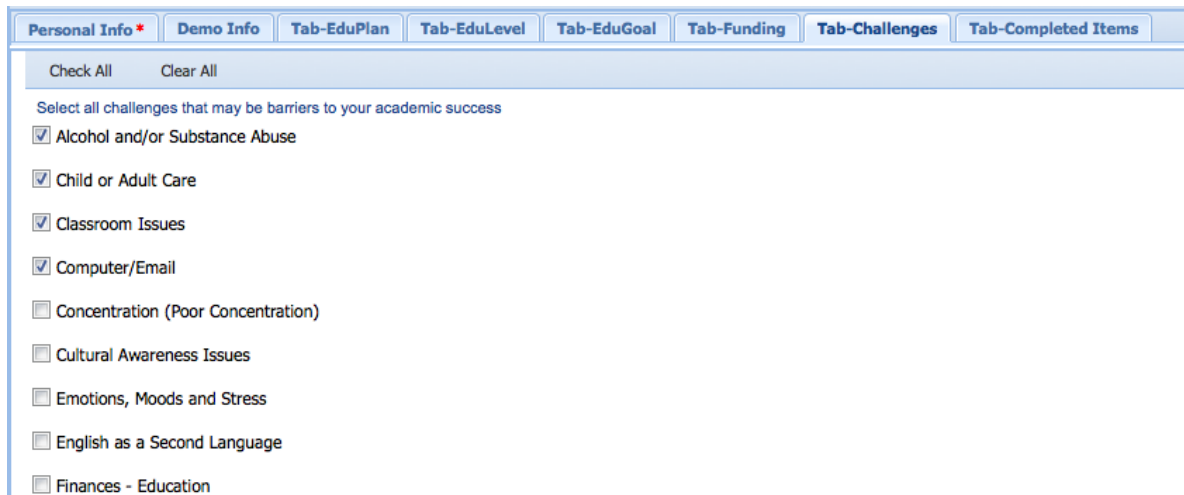
Challenges Tab

In this section, a student selects the challenges they believe could be a barrier to their college success. The challenges available are determined by your institution. It is expected that advisors, counselors, or coaches will link students to resources that will help them overcome their identified challenges.

QUICK TIPS: Be prepared to address with the student topics included in the challenge section. Typically you would choose at least 5-7 items critical to a student's success.

Completed Items Tab

In this section, a student selects the processes or steps they have already completed up to this point. Examples might be Orientation, a Campus Tour, Getting a Student ID card …etc. This tab provides a way to know what steps a student has taken, and how you could help them get to the next step.

Action Plan

Actions plans are a combination of goals, strengths and tasks to assist students in overcoming possible challenges and setting goals. Your institution will create a reference guide of all institutional and community

resources available to students for each challenge listed on the Challenges page. If you would like to create a task for a student based on one of those resources, the action plan is the ideal way to do that. However, if you would like to create a task unique to the student, a free writing option is available. This section will explain how to build both types of tasks, as well as how to enter strengths and goals for students.

Navigating the Action Plan Tool

When you are viewing a student's record, click "Action Plan" in the tools column and you will be taken to the main "Action Plan" page.
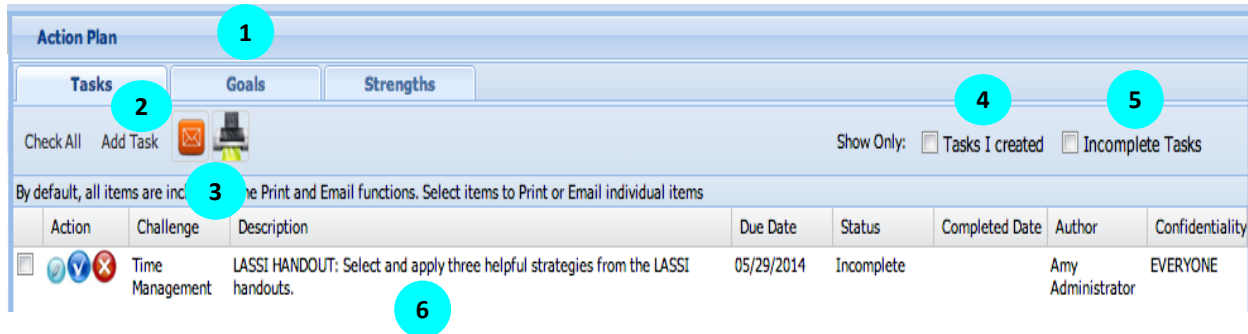
1. **Tasks, Goals and Strengths**: Click through each of these tabs to see, add, and edit a student's tasks, goals, and strengths.
2. **Add Task**: This button is present in Tasks, Goals, and Strengths tabs. To create a new task or goal, click on the "Add" button.
3. **The e-mail and print buttons:** The e-mail button allows you to e-mail the student's action plan to an e-mail address you designate. By default the entire plan will be sent or printed. If you would like to select individual items, select the check box next to the items you would like to include. The print button converts the action plan into a PDF that includes the strengths, goals, and all action plan task items to which you have access. This includes both the completed and not yet completed tasks. The PDF can then be printed.
4. **Display only tasks that I created**: Selecting this check box allows you to only see the tasks that you created for a student.
5. **Shows only incomplete tasks:** Selecting this check box allow you to only see the incomplete tasks
6. **List of Tasks, Goals, and Strengths:** The view defaults to the task tab and shows the student's active tasks. When you are in the goals tab, you can view all the students' goals. You will only see the tasks and goals within your confidentiality level. The strengths tab includes a text box available to enter student strengths.

Add a Task Using the Student Intake Assessment

When a student completes an intake assessment, they are provided with a list of challenges selected by your institution. These challenges correspond with resources available within the institution and the community to assist the student with the given challenge. When you review a student's intake assessment, the PREP system recognizes the challenges the student selected so you can easily provide and select the appropriate resources.

1. From the main "Action Plan" tool, click the "Add" button (shown above as #5).
2. You will see a list of Category filters. There will always be a filter called "Student Intake Challenges" along with the other configured Categories. When you click on that filter, it will refresh the Challenges filter to the challenge(s) associated to the selected Category.

3. Choosing a Category from the list, in this case "Grades", to see the resources that are available. The Resources are available to be added to a temporary list of all tasks to be added.

4. The Referrals can be added to the temporary list by:
   a. Choosing a Referral and clicking on Add.
   b. Clicking Add All to add all available Referrals.
   c. Dragging and dropping the selected Referral into the temporary list.

5. Steps 1-4 can be completed until all desired Referrals are selected to be Tasks.
6. From the temporary list, the available tasks are Remove and Removed All.
7. In addition to the Tasks based on Referrals, Custom Tasks can be added by supplying the name, description, link, target date and Confidentiality Level.

Add a Goal

1. From the main "Action Plan" view click on the "Goals" tab.
2. From the Goals tab, you can Add and Delete goals as well as e-mail and print the Action Plan.
3. Click on "Add."
4. Fill in the text boxes based on goals the student sets for him/herself.
5. Select Update when completed.

Add a Strength

When advising the student and creating goals and tasks, <u>focus also on the student's strengths</u> and what they want to draw on to help them achieve their goals and complete their tasks. The strengths entered will be visible to the student when the action plan is printed. Doing this provides the student with positive motivation.

1. From the main "Action Plan" view click on the "Strengths" tab.
2. From the Strengths tab, you can Add and Delete strengths as well as e-mail and print the Action Plan.
3. Click on "Add."
4. Fill in the text boxes based on strengths the student sets for him/herself.
5. Select Update when completed.

Give Students Their Action Plan

When an action plan has been created or updated, the student can review this information in three different ways.
1. **Through "My GPS":** This is the student's interface of PREP. Here they can see tasks they created for themselves as well as tasks created for them.
2. **By E-mail:** The coach can e-mail the student the action plan by selecting the mail icon at the top of the action plan screen and typing the student's e-mail address.
3. **Printed Copy:** The coach can print the action plan for the student by selecting the print icon at the top of the action plan screen to convert the plan to a PDF, which can then be printed.

Action Plan Example

Student:
Student ID:
Review Date: 5/28/13 2:52 PM   Follow-up Date: _____

Student Action Plan

Goal(s)	
graduate college	Be the first person in my family to graduate college

Strengths	
My strengths are:	Student is self motivated, and hard working.

Challenge:		
Completed	Action Steps	Target Date
not completed	: Study at the library one time a week for 4 weeks.	6/25/13 7:00

Challenge:	Child or Adult Care	
Completed	Action Steps	Target Date
not completed	Family Services: FAMILY SERVICES: Contact Pat Davis at Family Services Association 222-9481 for parenting education program. Parenting 101 Classes are offered throughout the year. Sliding fee scale will establish the fee and scholarships may be available.	5/10/13 4:00

I realize that agreeing to these goals and reaching them is my choice.

_____   _____   _____   _____
Student Signature   Date   Counselor/Coach Signature   Date

Journal

Journal notes are case management notes that can be created and shared with all individuals who assist with student success (based on confidentiality level). In addition to writing case notes, this feature allows departments to develop a process for certain populations of students, or for all students. Documenting the steps a student is expected to achieve in advising/coaching sessions and defining what is expected from the coach within each step helps departments outline expectations, track students' progress, and provide meaningful information to coaches.

Putting this process in place enables standard notes to be generated quickly and easily, leaving extra time to write what is unique about the student, or simply spend more time talking to the student.

Prior to learning how to use case notes it is important to define the three components of the journaling feature.

1. **Tracks**: The highest level of the journal feature is a "Track," a student path. Examples of "Tracks" may include academic warning/probation, new students, or new students in developmental education courses. Students participating in a special program may have a special track, or there may simply be tracks for each department. How this is operationalized varies by institution.

2. **Steps**: Steps are what the student needs to do to progress through the "Track" successfully. If you require some students to see a coach three times, the track may include sessions 1, 2, and 3. If you do not require, but encourage students to see a coach/advisor, the step may include an initial appointment and session 2+. How this is used by each department will vary. Keep in mind the "steps" will guide what information is available in reports. For example, a coach can run a report searching for all students who have or have not completed a specific step within a defined time frame to proactively help students stay on track.
3. **Details:** A detail is what a coach is expected to do within a step. Details may be included in multiple steps. For example, every interaction may require an advisor to confirm a student's academic goals and program. Creating these details allows a coach to quickly make a journal entry by clicking boxes for the details they have completed with the student.

Navigating the Journal

When you select the Journal tool from the "Tools" column you will see the journal history for the selected student.
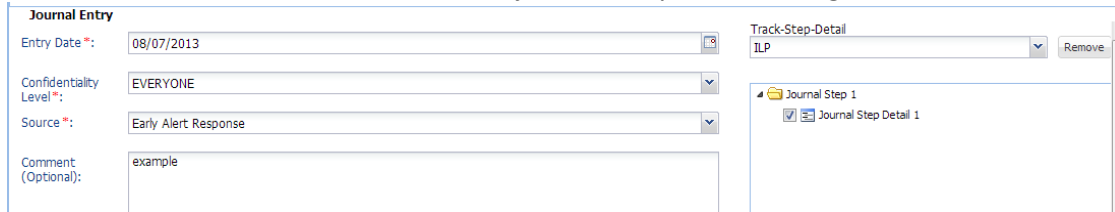
The areas of the journal are very simple. A list provided in the main field shows all journal entries. This information includes:
1. **Add and Save buttons:** Create a new journal entry and save it after creating.
2. **Cancel and Delete button**: The cancel button is used to cancel all changes in a journal entry since it was last saved. The delete button is used to delete a journal entry.
3. **Journal List:** This section lists each journal note that has been created. It defaults to sort by date last modified, but the sort order can be changed by clicking on the title of each column. This area includes:
   a. **Modified Date:** If an entry was modified, the last date a change was made.
   b. **Modified by:** Who modified the entry.
   c. **Source:** What triggered the entry (e.g. early alert response, appointment, phone call, case management, etc.).
   d. **Confidentiality:** Who has permission to see the note (set when the note is created). By default you will only see the notes for the confidentiality level you possess.
   e. **Entry Date:** The date the journal was created.
   f. **Entered By:** Who created the journal entry (helpful when students see multiple people).
4. **Journal Entry:** Create a journal note. Please see below for instructions.

Create a New Journal Entry Using Tracks

1. Click on the "Add" button. You will see the journal entry section change to blank fields.

2. The entry date will be auto filled with today's date; however, you can change the date if necessary. For example, if you document a session that happened yesterday, you may want the date to reflect your session date, not the date you write notes. It is advisable to create journal entries during your session whenever possible.
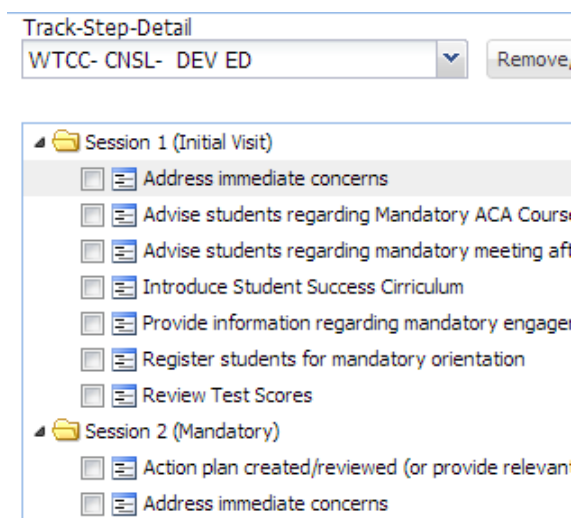3. Select the confidentiality level for a note. For example, a counselor who acts both as an advisor and a counselor will want to select "Everyone" when they are advising and "CNSL" when they have confidential information that is appropriate only for other counselors to view.
4. Add a source. A source would the communication that initiated the note, such as a phone call, e-mail from a student, or an appointment. If you do proactive work, such as review caseload to see if students are on track with their MAP, you can use the case management source.
5. Comments are optional when using journal tracks. For an interaction in which you complete standard steps, you may want to leave this section blank. This section is an area to write something unique about the interaction or record notes. If you are creating the journal entry while working with a student, you can add comments after they have left if you prefer.
6. The "Journal Track" field gives you a list of all available "Tracks." Select the appropriate track. Because similar tracks may be associated with other departments, a standardized naming convention is recommended (e.g., "ADVISE-New Student," "ADVISE-Probation/Warning," "CNSL-Advising," or "CNSL-Personal issues"). The list is alphabetical, which enables each department to find their tracks and then select the appropriate one.
   If you add a track and then need to delete it you must click the remove/reset button or select a different track.
7. After you select a track, you will see a list of sessions and the details associated with them.

8. Click the relevant details within the tracks. You can click details from multiple folders within the track. You can collapse folders to restrict the view to what is useful to you for the session.
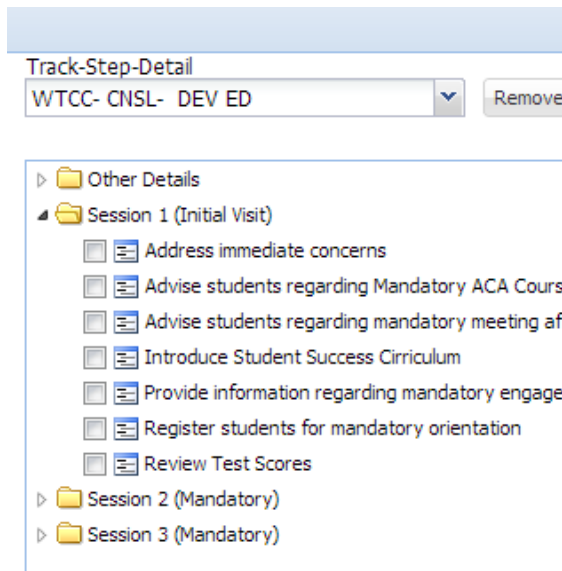
9. Keeping an "Other Details" folder as shown above allows quick access to frequently used optional advising tasks. When you finish selecting options hit "Save."
10. The journal entry, in PDF form when viewing "coaching history" will look like this:

Create a New Journal Entry Without Tracks

Creating a new journal entry without tracks is exactly the same as creating an entry with tracks except:
1. You only enter free-write comments.
2. You do not select a journal track and its session details.
3. If you accidently select a journal track, select "remove/reset."

Edit a Journal Entry

1. Click on the journal entry in the list. In the journal entry section below the list, you will see the entry.
2. Make edits in the fields provided.
3. Click "Save."

MAP (My Academic Plan)

Overview

My Academic Plan (MAP) is a student advising process that combines the characteristics of prescriptive academic advising with the strengths of technology-supported record keeping, providing students with accessible, specific, long-range, and accurate plans for the completion of their academic goals. These plans guide the student's course selection term-by-term and ensure that course selections are continuously evaluated against the student's stated goals.

Advisors can create a MAP for a student in three ways.
1. Populating a MAP using an ideal pathway that has been vetted through the institution as the standard pathway to complete a specific program.
2. Creating a MAP that simply documents what the student needs to do for a certain amount of semesters. You can make a MAP that looks exactly like an ideal pathway, starting with their first semester and ending with their last, if an ideal pathway template has not been created.
3. A hybrid of both - creating your own template. Advisors tend to populate the ideal pathway MAP and then tweak the MAP to be unique for the student. But you may find the custom MAP would be relevant for another student. In these cases you can save the MAP as a template that can be used again. A few examples about why you may do this are listed below:
   a. An ideal pathway does not include developmental education classes and you find that you shift semesters forward each time you populate the ideal pathway. You may use your custom template when you meet with a student who needs these additions.
   b. A program does not have an ideal pathway template yet and you create one. You can save the template so you only need to create it once.
   c. You see students who typically need a sequence of developmental education and do not have a declared program of study. You create a standard documentation MAP that you can use for students with similar needs.

In this section we will review the icons and links that are needed to navigate a MAP and then we will learn how to create a MAP in each of the above three ways.

Navigating the MAP

To access a student's MAP select the "MAP" tool from the tools column in a student's record. If there is an active MAP this will be the default view. If the student does not have a MAP, a blank map will appear. The MAP has a number of icons and links that will help make a student's MAP unique. In this section we will review these buttons in detail.
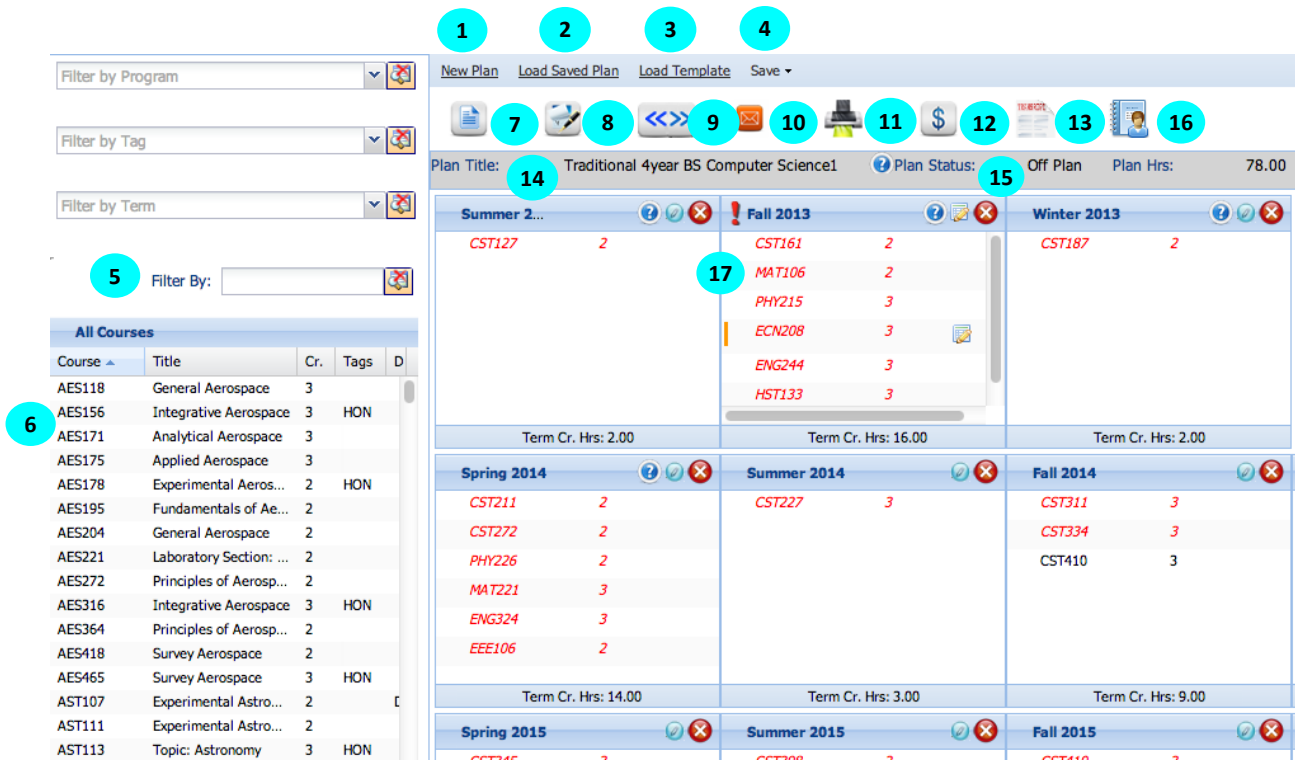
1. **New Plan –** Click this button if you would like to load a blank map.
2. **Load Saved Plan-** This link allows you to load any MAP associated with the student. When this link is selected you will see a list of MAPs and the Advisor who "owns" the MAP. The current MAP will display in blue. In this view you can see the plan title, if the MAP is marked as important, the date and time it was created, and the advisor who created it.

3. **Load Template –** This link allows you to load both a private template (saved documentation MAP or altered ideal pathway) and a public template (e.g. ideal pathway). When you click this link you will be able to filter by specific program, department, or division and search by the template name, type, or status. For example, you can search for a particular program or you can filter the search to only include your own templates.

4. **Save Plan, Save as Plan, and Save as New Template** – This allows you to save a MAP you create for a student or save a MAP as a new private template.
   a. Save Plan: When you have completed a student's plan, click this button. You will see a pop up where you can:

   i. Mark the plan as an active plan.
   ii. Mark it as important.
   iii. Mark it as required for financial aid.
   iv. Mark the student as F1 Visa.
   v. Provide or view basic information regarding the plan.
   vi. Provide or view basic information regarding the plan creator.
   vii. View pre-populated or free written notes unique to the plan.
   b. Save as New Plan: This makes a copy of the plan that you can save as a new plan. The previously populated notes will pop up and you can change the title and any other information as necessary.
   c. Save as New Template: This allows you to change the MAP you just created to a template that is either private or public. You would do this when you expect that this plan would apply to other

students. You can also provide program, division, and department information while saving as a new template.

5. **Course filters –** Course filters allow advisors to view the list of courses in a more manageable way. A number of different hierarchal filters (program, term, tag, in that order) are available. For example, you can filter course by program and by tag, but only courses tagged with your selection in the program would be visible. If you want to see all courses with the tag you would need to remove the program filter.
    a. Filter by academic program - This selection allows advisors to filter the list of required courses by academic program.
    b. Filter by tag - This selection allows advisors to filter the list of courses by course tag. For example, a tag may indicate a course is transferable to a specific college. Filtering by this tag allows an advisor to look for electives transferable to this transfer institution. Tags may also be useful for developmental education courses, distance learning, honors, etc.
    c. Filter by available terms - This selection allows you to see only the courses that are available for the selected term.
    d. Filter by key word – This selection allows you to filter courses based on key word search. For example, you could type ACCT to see all accounting courses. Or 101 to see all 101 courses. You could also easily pull a course for which you knew part of the title by typing in any key word from the title.

6. **Course list view –** You get a snapshot of the course list in this view, including course name, course number, credit hours, tag code and whether a course is developmental (indicated with a D). You can also view the detailed information shown below by double-clicking on a specific course:

Course Details

Course:	AES156 : Integrative Aerospace
Course Description:	Integrative Aerospace
Max Credit Hours:	4
Min Credit Hours:	3
Department:	
Division:	
Tags:	HON
Requisites:	

    a. Course name
    b. Course description
    c. Credit hours
    d. Department
    e. Division
    f. Tags
    g. Requisites for the course, if any
    h. Link to master syllabus, if available

7. **View All -** This quick link pulls up the entire plan including all notes.
8. **Plan Notes -** These are the notes entered when you saved the plan. In this area you can save, edit, and add notes.
9. **Move Plan -** An advisor can use the move plan feature to shift the contents of a plan or template from one term to another. This allows templates to be updated easily or adjusted if a student skips a term.
   Below are the steps to move a plan:
   - Click on "Move Plan" if you have selected a student's plan or "Move Template" if you have selected a template.

- A dialog box (below) appears which contains instructions and options for moving.
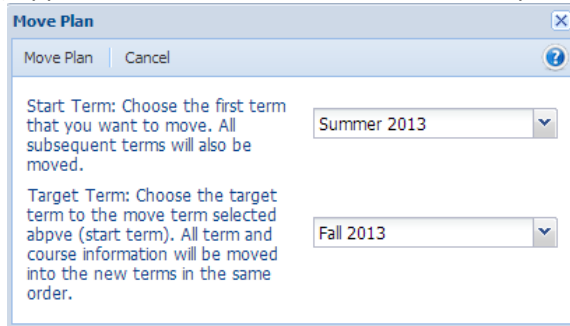
- Select the start term to move. All terms after the start term will also be moved.
- Select the target term.
- Click on "Move Plan" to perform the action.

Courses are validated when they are moved to new terms based on available course offerings and pre/co-requisites offered in those terms.

a. Below is an example of the validation warning if courses are not offered in a term:
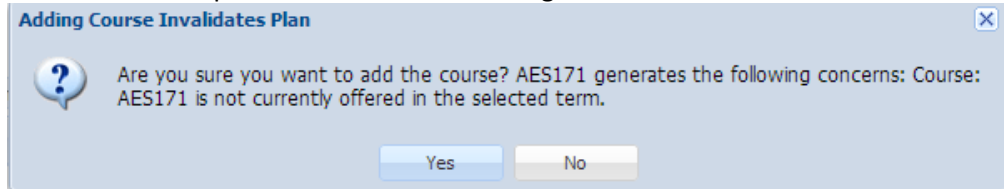
b. Below is an example of the validation warning if the pre/co-requisites and the course are not offered for the selected term:
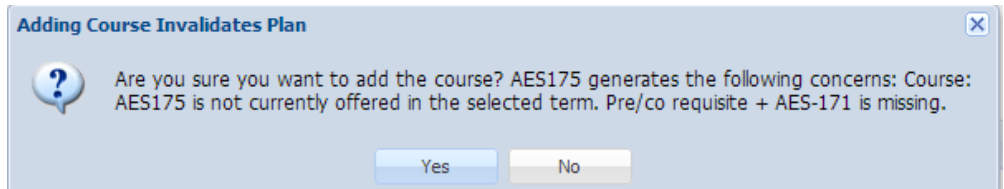
Accept/Reject the warning as needed.
If accepted, the moved plan with courses starting from target term appears.

10. **E-mail Plan -** This link allows you to e-mail a student's MAP. You can enter any e-mail addresses and add a personal message. You can choose between two views when you e-mail MAPs.
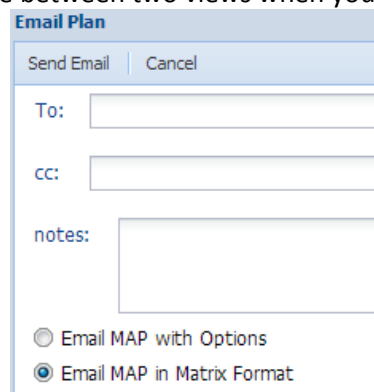
    a. **E-mail MAP with Options -** This is a comprehensive view in which, when all options are selected, you will see the same content as in "View All" button. The options that are available are:
        i.   With Course Descriptions.
        ii.   With Header/Footer.
        iii.   Total Time Expected Outside Class.
    b. **E-mail MAP in Matrix Format -** This is the simplest form and only includes each term, course number, title, and credit hours. There are no notes in this view.

New Plan

Spring 2014

Course Number	Course Title	Credit Hours
CST410	International Computing	2
CST477	College level Computing	3
ECN217	Quantitative Economics	3

Total Credit Hours: 8.0

11. **Print Plan -** This link allows an advisor to create a PDF that can then be printed and provided to students. The same options (Print MAP with Options, Print MAP in Matrix Format) that are available for e-mail are available here.

12. **Financial Aid -** This link is used to retrieve financial aid information, which can influence course choice and course load when building a MAP. Financial aid eligibility, satisfactory academic progress (SAP) and academic standing play a critical role in course selection. Clicking on the Financial Aid link would display a box with information from the Main Tool available at a glance for the advisor. Please see the screen capture below: (Configurations will vary at adopting colleges, for what information is shown, and in what format)

Financial Aid ☒

GPA: 2.33 Same

Standing: Good

Restrictions: None

FA GPA: 2.2

    Hours needed to earn a 2.0 GPA with all A grades: 9

    Hours needed to earn a 2.0 GPA with all B grades: 9

Hrs Earned: 31

Hrs Attempted: 36

Comp Rate: 86.11%

    Hours need to earn a 67% completion rate: 9

Reg: FA2013 FA2014 SP2014

Payment: FA2013=Y FA2014=Y SP2014=Y

Balance: $0.00

SAP: Y

F1:   N

FASFA: 08/20/2012

FA Award: Y

FA Amount Remaining: $809.00

Loan Amount: $6,600.00

13. **Transcript -** By clicking on this link, an advisor can see the student's transcript including term, course number, course title, number of credit hours, and grade in the respective course. Credit type (e.g., Institutional, Provisional etc.) is also displayed. This information can be sorted by clicking on the column of interest, clicking on the down arrow, and then selecting to sort by "Ascending" or "Descending."

See the below screen capture for details:

Student Transcript

Term	Course	Course Title	Cr Hrs	Grade	Credit Type
FA2...	AST113	Topic: Astronomy	51	B	Institutional
SU...	HST133	General History	52	B	Institutional
SP2...	COM403	Introduction to Com...	51	A	Institutional
SP2...	SCL258	Inquiry into Sociology	52	C	Institutional

14. **Plan Title -** The name of the plan is listed here.
15. **Student's Plan Status -** This field indicates whether the selected student is on plan or not. There are two options available for this field - On Plan and Off Plan. If the advisor hovers on "On Plan" or "Off Plan," a customizable message is displayed. For example, an off plan message may be "Student is exploring other careers and is taking courses off plan."
16. **MAP Report -** Shows the latest plan status calculation report and allows users to re-calculate the status to incorporate any recent changes.
17. **Student course section -** This section contains much information about the semesters and courses that have been advised.
    a. The top banner includes:

    Current Total Plan Cr Hrs: 30   Dev Cr Hrs: 0

        i. Current total planned credit hours.
        ii. Developmental education credit hours.
    b. Each semester includes:

    Fall 2013

CHM218		3
AST341	PRG	3
COM327	HUM	2
FIN151		2

    Term Cr. Hrs: 10

        i. Semester name.
        ii. Pencil icon to add semester notes (When notes are added this becomes a "Pencil and Paper" icon. This feature allows you to make notes relevant to a specific term.

    Term Notes

    Save   Cancel

    Advisor/Coach Notes: If the student has followed his/her map they may be eligible fo a diploma while finishing the associates degree.

    Student Notes: You may be eligible for a diploma while completing your AA degree. Please see your advisor this semester to confirm.

    ☑ Mark As Important

35

iii. Paper and Pencil icon to indicate semester notes have been added. Hovering on the icon will display the notes.

iv. The "X" icon to delete a course.
- To delete a course click on the course and hit the "delete" icon

v. If you mark the term as important in the comments box, a red alert icon appears as shown below:
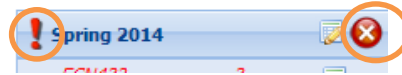
vi. Courses.

vii. Total credit hours for the term.

> **QUICK TIP: When a term ends, courses taken will be indicated by a color. MAP does not render a color based on the grade. All plan courses matching a course on the transcript regardless of the passed or failed status of the course. Based on the system configuration, past terms may be able to be edited to update failed courses or those for which the student didn't registered.**

c. Each course includes:

i. The ability to edit by double-clicking on the course. The notes available to the advisor are:

- Advisor only notes
- Student notes
- Credit hours
- Mark as Important option
- Elective selection

ii. The ability to delete by clicking a course and then selecting the "X" icon.

iii. A Paper and Pencil icon to indicate notes have been added to a course.

iv. Default colors indicate other statuses or information:
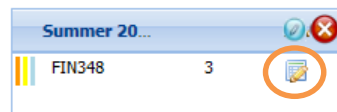
- Yellow - already on transcript in the plan term.
- Blue - already on transcript in a different term.
- Orange – important.
- Red - indicates the course is a development education course.
- Other colors indicate different types of electives. For example, in the above screen capture FIN348 was marked as important, has already been taken, and is an elective course.

- Course names appear in red text if that course is not offered in that term and in black text if the course is offered, as shown below:

Hovering on the red text reveals additional information about the course, as shown below:

Creating a MAP From a Template

Types of templates include Ideal Pathway Program Templates, Department or Division Templates, and Personal Templates.

1. Click on "Load Templates" and you will get the following pop-up:

2. You will see both your private templates (saved documentation MAP or altered ideal pathway) as well as authenticated and public templates (ideal pathway, shared department templates, or division templates).
3. To find the best template, filter by one or more of the following options:
   a. Program
   b. Department
   c. Division
   d. Visibility
   e. Status (active or inactive)
   f. Template name
4. When you see the template you want, click on it.
5. Click "Open."
6. You will now see the template in the student's map with all pre-populated notes and colors. Courses the student has taken will be indicated in yellow.
7. You can personalize the MAP for a student by:
   a. Changing the arrangement of courses according to scheduling needs.

i. Drag and drop courses to new semesters.

ii. If a course is not offered in the selected term, you will receive a notification.

Adding Course Invalidates Plan

Are you sure you want to add the course? ECN346 generates the following concerns: Course: ECN346 is not currently offered in the selected term.

Yes   No
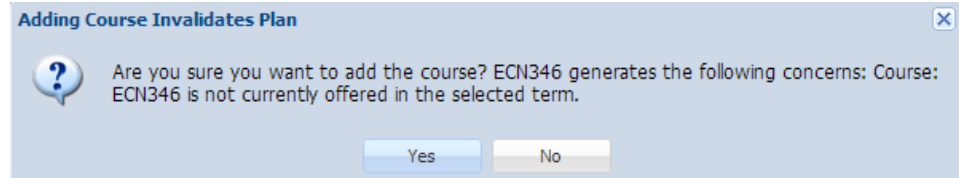
b. Changing electives to reflect the student's goals.

    i. Electives should be marked by color when the MAP is created.

    ii. Ask students about each elective option and make changes that are reflective of the students' interests and needs.

    iii. If you attempt to add a course that is not known to be offered in the target term, a notification will appear that asks if you would like to continue. If you click "No," the course will not be added.

c. Adding specialized course notes:

    i. Advisor Notes - Notes only available to advisors.

    ii. Student Notes - Notes available to students and advisors.

    iii. Credit Hours.

    iv. Mark as Important - Select this box if you would like mark the course as important. If a course is offered only once a year or once every other year, you may want to mark it as important and add a color flag to trigger the student and any other advisor to think carefully before suggesting a student not take this course.

    v. Associate a course with an appropriate elective.

If you mark a course as important and identify it as a humanities elective, when you hit "Save" it would be identified as such by color. Color codes are set by the institution and can be changed.

d. Adding specialized semester notes: Click on the "Pencil" icon to receive the editing pop up. When you have finished select "Save." After notes have been added, the "pencil" icon will become a "pencil and paper" icon.

When you finish creating a template, select "Save Template." The save template option will update the template with the changes you made. You can also "Save As New Template" if you would like to keep your personalized changes for additional students. You can also click on "Save as Plan" if you want to save this as a plan.

When saving a new template, please use the Jefferson College File Naming Conventions. Use underscores (_), not spaces to separate words, capitalize each word for better usability, & include the date.

Creating a MAP & Saving it as a Template or Ideal Pathway

When you access the student's MAP, you will see a blank map. To create a new MAP, fill out as little or as much information as desired.

1. Use the "Filter by Program," "Filter by Tag," "Filter by Term," and open "Filter" search areas to find an appropriate course.
2. Drag and drop a course from the course list into the designated area:

3. If you attempt to drag a course into a term it is not offered, you will see the following message:
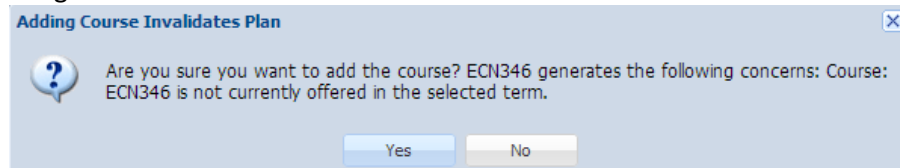
4. If you would like to add notes or select an elective course, double-click on the course and a notes box will pop up:

   a. Advisor Notes - Notes only available to advisors.
   b. Student Notes - Notes available to students and advisors.
   c. Credit Hours

d. Mark as important - Select this box if you would like mark the course as important. If a course is offered only once a year or once every other year, you may want to mark it as important and add a color flag to trigger the student and any other advisor to think carefully before suggesting a student not take this course.

e. Select an elective - If the course is an elective, you can associate it with the appropriate type of elective. Your institution decides what options are available.
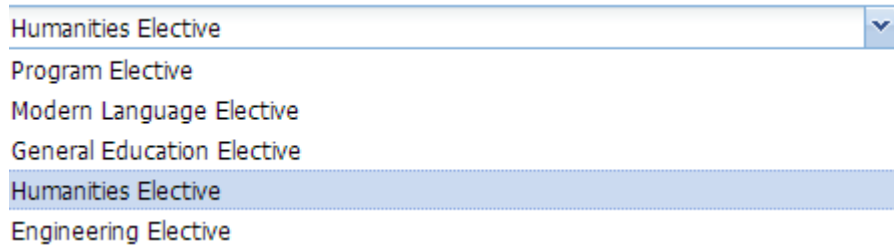
5. If a course were marked as important and as a humanities elective, when you hit "Save" it would be identified as such by color. The colors used are set by the institution.
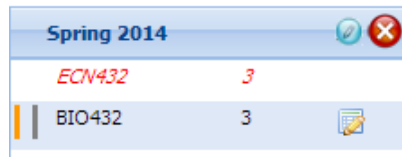
6. If you need to remove a course, click on the course and then select the "Delete" icon in the header for the term.

7. Click the "Pencil" icon to write notes associated with a term. Notes can include directions for stackable credentials, notification that a student may need a background check for their program, or any other important event that should occur during that semester. If a note has been added, the "Pencil" Icon turns into a "Pencil and Paper" icon.
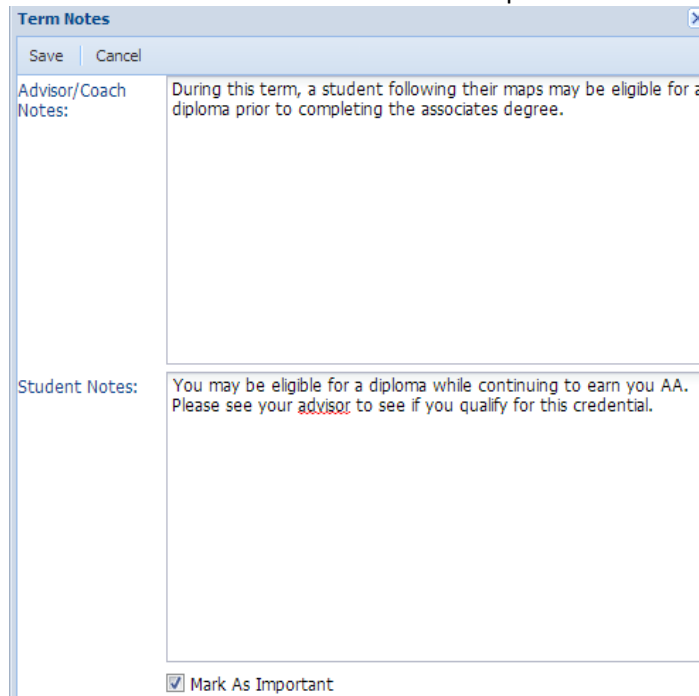
8. When you finish creating the MAP, there are three options for saving:

a. Save as Plan - This makes a copy of the created plan and allows you to save as a new plan. You will have the option to fill in or edit plan notes.

Save Plan ✕

Save | Cancel

Active Plan: ☑   Important / Caution ☐   Required For Financial Aid(SAP) ☐   F1 visa ☐

Plan Title *:	Joe's Plan
Contact Name:	Patty Wolfe
Contact Title:	Plan Master
Contact Email:	
Contact Phone:	
Academic:	
Career Data:	
Advisor/Coach Notes:	Coach notes
Student Notes:	Student notes
Academic Goals:	Graduate

    i. Select the check box if a plan is intended to be active, marked important/caution, required for financial aid, or F1 visa.

    ii. Create a title for the plan.

    iii. Fill in contact information and relevant notes. Notes are viewable by clicking the "Plan Notes" icon. They can be edited here as well.

    iv. Hit "Save."

b. Save Plan - Select "Save Plan" to save a newly created plan or to save a plan for which you made changes. Selecting "Save Plan" will display the above pop up, giving you the option to make edits.

c. Save as New Template - This allows you to save the MAP as a new template (including ideal pathway) so you can use it again. You can:

Save Template ✕

Save | Cancel

Active Template: ☑   Private to Me ☐

Program:	Division:	Department:
Specific Program ▾	Specific Division ▾	Specific Department ▾

Plan Title *:	Sarah's Plan
Contact Name *:	
Contact Title:	
Contact Email *:	
Contact Phone *:	
AcademicLink:	
Career Link:	
Advisor/Coach Notes:	This is an area for notes for other advisor/coach's and is related to the plan. Like... "This is a partial plan. Please feel free to add"
Student Notes:	This is an area for notes related to this plan and are visible to students. Like... "This is a partial plan, completing this plan is only one step towards graduation"
Academic Goals:	

    i. Choose whether to mark the template as private so only you can see it.

    ii. Assign the template to a specific program, division, or student services department. For example, if first year advisors had their own department they may want to create and share MAPS for developmental education sequences.

   iii. Fill in appropriate contact information for the MAP.

          iv.   Provide program level notes.
          v.   Select "Save" to save the template.

Only users with the appropriate permissions have the ability to save or edit a MAP public or authenticated template.

Loading a Saved Plan

Students often have multiple plans because they have changed their program or because different advisors make changes to a map. Loading a saved plan allows you to reload a plan you created and make it the active map.

1. Click "Load Saved Plan."
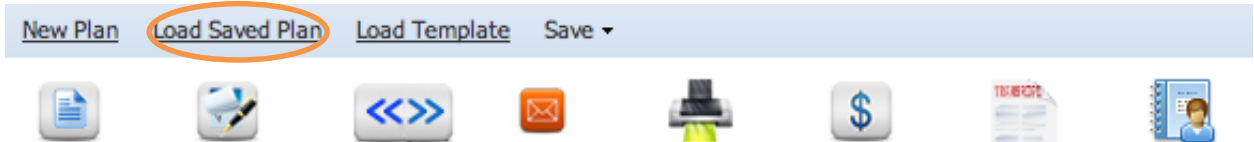
2. Select which plan you would like to load by clicking on it and clicking "Open." The active plan will be marked in blue.
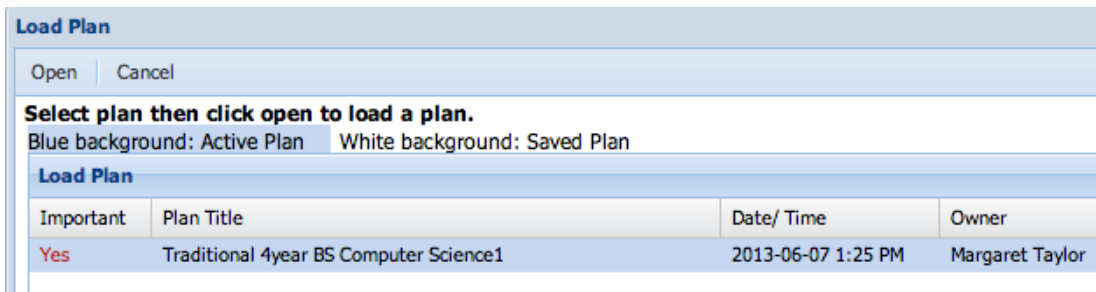
3. When the plan has loaded, you can edit and save it in any of the ways mentioned previously.

Early Alert (for Coaches)

The Early Alert function within the PREP tool is for advisors to manage alerts issued on any of their students. Advisors can see limited alert information prior to entering the "Early Alert" tool.

1. A student with an open Early Alert on their caseload will be highlighted when their coach logs in. An orange highlight indicates at least one open Early Alert with a current response. A red highlight indicates at least one open Early Alert with an overdue response. This allows the coach to easily see who needs action without having to do a daily search.

2. When a coach accesses a student's record, they see the "Dashboard" on the "Main" features.
3. This area includes information about the number of open and closed early alerts issued on behalf of the student. The example below shows the student has had 6 total alerts with 5 currently open.

Navigating the Early Alert Tool

When you click on the "Early Alert" tool within PREP you can review the both open and closed alerts for your given student. The light of Early Alerts is also highlighted. An orange highlight indicates the Early Alert has a current response. A red highlight indicates the Early Alert has an overdue response.

1. **Responses** - Each time an advisor creates a response within the Early Alert system, a notification is sent to the faculty member who triggered the alert. This number is a count of those responses. It is suggested that there always be at least one response to close the communication loop.
2. **Created By** - The name of the faculty member who created the alert.
3. **Created Date** - The date the alert was submitted.
4. **Status** - The status of the alert, either "Open" or "Closed."
5. **Details** - Details include the course about which the alert was created.

Viewing an Alert

To look at an alert, click on it within the list.

Each alert contains basic information about the alert submitted, its status, and responses.
1. This section includes who created the alert, the course, and when the alert was created. It also includes why the alert was made, any comments entered, and suggestions on resolution.
2. Status indicates if an alert is "Open" or "Closed." If an alert is closed, status indicates who closed it and when.
3. The Responses section lists each response to the alert.

Viewing or Creating Responses

To create a new response to an Early Alert, click on the text "Respond to selected Early Alert."

Early Alert Response

2 Save | Cancel

Early Alert Course:

3 Outcome *: [Select One ▾]

4 Outreach * *:
- Phone Call
- Email
- Letter
- Text
- In Person

5 Comment *: [ ]

6 Close: ☐

7 Department Referrals:
- Counseling Services
- Disability Services
- Academic Advisor
- Athletic Advisor
- English as Second Language
- Financial Aid Office
- Instructor for Course
- Action Plan
- The Tutoring and Learning Center
- Registration

[→]
[←]

1. If you would like to return to the Early Alert list or details instead of saving this alert, click the respective button.
2. To save a response you have completed click "Save."
3. Example Outcomes options include: (Configurable by Functional Admin)
   a. Student responded.
   b. Student did not respond. – Your institution will decide when to change the status from "Waiting for a response" to "Student did not respond," and how many times you might contact them.
   c. Waiting for a response.
   d. Not an Early Alert class.
   e. Duplicate Early Alert notice.
4. Outreach: Method of attempted communication.
5. The comment section is for the advisor to write a comment to the faculty member. The comment is not sent to the student. Early alert comments do not have a confidentiality level.
6. If this response concludes the alert, click the "Close" box to change the status when you save.
7. Department Referrals indicates what referrals you made. These options are configurable by your institution. To record the referral:
   a. Drag an item from one side to the other by clicking on it and dropping it on the other side.
   b. Highlight the item you want to move and click the respective arrow.
   c. Highlight multiple options by holding the "Control" key down while you highlight the referrals and then click the arrow.
8. When the response is saved, three results are automatic:
   a. An e-mail is sent to the faculty member with the details of the response.
   b. A Journal Entry is recorded with the details of the response.
   c. If a Referral was selected, an e-mail is sent to the configured e-mail address for the Referral definition.

To view a response within the alert:
1. Click on the response from the "Response" section of the Early Alert.
2. All information an advisor has entered in the section will be visible but not editable.

3. To go back, click "Return to Early Alert List" in the top left corner of the screen.

Early Alert (for Faculty)

Faculty members who do not have an advising role login will only see the "Early Alert" button. Faculty members can create an early alert for students in their designated classes in this area. The institution may limit alerts by either restricting alerts to certain classes or certain students.

Navigating the Alert Main Page

You will see the main page:

Course Roster

MAT443 - Honors Mathematics - FA12 ⬍ **1**

Click a student from the Course Roster to send an Early Alert.

< previous   1   next >   Viewing page 1. Showing records 1 - 9 of 9 items.   10 ⬍ per page

Student ID	First Name	Middle Name	Last Name	Status
	James **2**	Mumford		E
	Joseph	Mumford		E

1. There is a drop down of all courses for which the faculty member can send an early alert.
   a. Click the "Down" arrow.
   b. Select the course.
2. The bottom half of the screen is a list of all students in the selected course.
   a. If more than 10 students are enrolled, the results will be displayed on multiple pages.
   b. Sort by any field (First Name, Middle Name, Last Name, Status), by clicking on that field. To sort the field in the opposite direction, click on the field again (e.g. sort first name A to Z; then click again for Z to A).
   c. The "Status" field denotes if the student is currently enrolled (E) or withdrawn (W) from the class.

How to Send an Alert

To select a student for an alert, click on any field within the student row. The following page appears:

Early Alert

Early Alert Details

Course:	MAT443 - Honors Mathematics
Term:	FA12
Student:	**1**
Enrollment Status:	E
Net ID:	
Student ID:	
Student Email:	
Student Type:	Early Alert Student
Assigned Counselor/Coach:	Harter, Cathy **2**
Office:	
Phone:	
Department:	
Email cc:	**3**
Campus: *	Select a campus... ⬍ **4**
Referral Reasons:	⊕ Add/Edit **5**
Faculty Suggestions:	⊕ Add/Edit **6**
Comments:	**7**

8 Send Early Alert   Cancel

48

1. **Basic information** is provided for your reference. This includes:
   a. Course
   b. Term
   c. Student Name
   d. Enrollment Status
   e. Student ID
   f. Student E-mail
   g. Student Type (e.g., new, transition, returning etc.)
2. **Coach Information** (including name contact information) is imported, if available.
3. **E-mail CC** - If you would like copy someone other than the coach to receive the alert e-mail, enter their e-mail address here.
4. **Campus** – Select the appropriate campus for this alert.
5. **Referral Reason** – Select the appropriate referral reason(s) as to why the alert for the given student was initiated. This standard list is developed by your institution. Examples may include:
   a. Academic concern
   b. Excessive absence
   c. Low homework/quiz scores
   d. Low test scores
   e. Never attended
   f. Personal concern
   g. Tardiness
   h. Other
6. **Faculty suggestion** - To provide a suggestion to the coach for how an alert can be resolved, faculty members can click the "Add/Edit" link. A list of options (pre-determined by your institution) will be provided. You can also type a suggestion not listed.

7. **Comments** - To provide additional details regarding the student or alert, type them in this box. Comments are not required. The content entered will not be visible to the student, but it is a communication that will stay in the student's record.
8. When you have completed the fields click "Send Early Alert."

What happens when an Alert is sent?

When an alert is sent, a number of e-mails are generated.
1. An e-mail is sent to the coach and any watchers. If the student has been assigned a coach/advisor, that coach/advisor will receive the early alert. If an advisor is not assigned, the alert will be sent to a general advising inbox. This person is responsible for monitoring the general inbox and reassigning as appropriate.
2. An e-mail is sent to the faculty member when you submit the alert indicating the alert was successfully submitted.
3. An e-mail is sent to the faculty member when the coach responds to the early alert. The coach will inform you when they have taken action on an alert. You may get multiple e-mails if the student is non-responsive, or if the alert requires multiple contacts. For more information about how coaches respond, please see the chapter "Early Alert (for Coaches)." Each institution will have their own rules for when an alert needs to be addressed, how many contacts need to be made, and how much information is provided back to faculty. Please talk to student services about this process to ensure proper expectations.
4. An e-mail could be sent to a student. The institution will determine whether students will be notified of alerts submitted on their behalf. The e-mail does not indicate the reason for the alert or include any additional comments. Regardless of the institution's decision, it is suggested that you communicate openly with students about alerts, what they are intended to accomplish, and why you may send them. An example e-mail a student might receive is below:

> Dear **[Auto insert student name]**
> Your instructor for **[auto insert course name]** notified advising that you are experiencing issues that might affect your success at **[ADD your institution name]**. An academic advisor, counselor, or coach will contact you soon to discuss your situation. In the meantime, here are a few resources which may help you find academic success:
> **[ADD standard resources that might be helpful like tutoring, writing services, counseling, etc.]**
> We value you as a student and want to support your success. If you have not been contacted by someone within a week, please contact either the faculty member of the course or your academic advisor, counselor, or coach. Their information is listed below:
> **[Auto insert instructor name for course, phone and e-mail]**
> **[Auto insert coach name, phone and e-mail]**
> This is a system generated e-mail. Please do not reply to this confirmation.

Accommodation

The Accommodation tool was created for disability services to document students' needs within PREP. The office of disability services ("ODS" below) can have their own confidentiality setting that limits access to this information.

Navigate Accommodation

1. From the tools section select "Accommodation."
2. You will see the main screen:

3. Five tabs can be filled out to document the student's records and needs. When you have entered information, click "Save."

   a. **General** - This is the tab visible when you enter the Accommodation tool. ODS statuses are configurable but by default include:
      i. **Eligible** - Student is eligible to receive services and accommodations.
      ii. **Ineligible** - The student is not eligible to receive services or accommodations.
      iii. **Pending** - The student's request for services and/or accommodations is pending.
      iv. **Temporary Eligibility** - The student is temporarily eligible for services and/or accommodations. For example, a student who breaks their leg will need services or accommodations temporarily.
   b. **Agency Contacts** - Agencies who are working with or referred students to the institution. This list is configured by the institution.

   c. **Disability** – Select the documented disabilities of a student. This list is configured by the institution.

Accommodation

Save   Cancel

| General | Agency Contacts | Disability | Disposition | Accommodations |

Select all that apply

☐ ADD/ADHD

☐ BLIND

☐ DF

☐ DH

☐ EMO

☐ HDH

☐ LD

☐ MULTI

☐ OR

☐ OTHER

☐ SP

☐ TBI

☐ VIS

d. **Disposition** - On the Disposition page, you can record the following:
     i.   If a release document was signed
     ii. If records were requested and the date the request was sent
     iii. If a student was referred for screening of LD/ADD and the date the documents were sent
     iv. If rights and duties information were sent/given to student
     v.   If an eligibility letter was sent and the date it was sent
     vi. If and when an ineligibility letter was sent
     vii. Document reason for ineligibility
     viii. Document a list of medications
     ix. Document functional limitations

Accommodation

Save   Cancel

| General | Agency Contacts | Disability | Disposition | Accommodations |

Disposition: ☐ Release Signed
                    ☐ Records Requested
                    Records Requested From: [   ]
                    ☐ Referred for Screening of LD/ADD
                    Documents Requested From: [   ]
                    ☐ Rights and Duties
                    ☐ Eligibility Letter Sent
                    Eligibility Letter Date: [   ]

                    ☐ Ineligibility Letter Sent
                    Ineligibility Letter Date: [   ]

                    ☐ No disability documentation received
                    ☐ Inadequate documentation
                    ☐ Document states individual has no disability
                    ☐ HS reports no special ed placement/no report

On Medication: ☐
Please list
medications: [   ]

Functional
limitations?,   [   ]
please explain:

e. **Accommodations**: Select appropriate accommodations. The list of accommodations is configured at the institution level. Your institution's list of accommodations may be different from the list shown below.

Documents

The Documents tool allows PREP users to store and note relevant documents within PREP. The documents are available for other PREP users to view and provide information to coaches and advisors.

A sample usage scenario for this tool:

A PREP coach works with a student to develop an Action Plan with several tasks for the student to complete. During the session, the coach prints the Action Plan and asks the student to sign. After the coach scans the document to a digital file, the coach uploads the signed Action Plan into PREP by navigating to the Student Documents tool and clicking to add a new file. The coach selects the scanned file from their computer and adds a note that the student would like information on the Action Plan to remain private. The coach selects the appropriate confidentiality level and completes the upload.

This information can be viewed in a number of ways by clicking on the column of interest, clicking on the down arrow, and then selecting to sort by "Ascending" or "Descending."

Below is the screen capture of Notes tool from the application:-

Tools	Documents Attached to the Student Record				
Main					
Intake	Add Edit Delete Download				
Action Plan	Date	Name	File	Author	Comments
Journal	08/08/2013	Action Plan	Action Plan.png	Chris Garcia	Action Plan -8th Aug
Early Alert					
MAP					
Accommodation					
Documents					
Notes					

Notes

The Notes tool incorporates notes from a third party application into a display available for viewing to PREP users. This single location provides a method to review remarks/notes that are loaded from any system in order for coaches to get a comprehensive view of comments/notes/remarks. The notes displayed are "Read Only" and cannot be edited within PREP.

This information can be viewed in a number of ways by clicking on the column of interest, clicking on the down arrow, and then selecting to sort by "Ascending" or "Descending."

Below is the screen capture of Notes tool from the application:-

Tools	Notes and Communication to Student				
Main	Date	Type	Author	Department	Note
Intake	07/09/2013	Recruitment System	Dan McCallum	Fixer	Note 8
Action Plan	07/08/2013	Recruitment System	Dan McCallum	Fixer	Note 7
Journal	07/07/2013	Recruitment System	Dan McCallum	Fixer	Note 6
Early Alert	07/06/2013	Recruitment System	Dan McCallum	Fixer	Note 5
MAP	07/05/2013	Recruitment System	Dan McCallum	Fixer	Note 4
Accommodation	07/04/2013	Recruitment System	Dan McCallum	Fixer	Note 3
Documents	07/03/2013	Recruitment System	Dan McCallum	Fixer	Note 2
Notes	07/02/2013	Recruitment System	Dan McCallum	Fixer	Note 1

Reports

Reports help an institution determine the effectiveness of an initiative, help departments engage in continuous improvement, and help staff members manage their caseloads. In PREP, a number of standard reports are available.

Navigating Reports

Select "Reports" on the navigation bar to run the standard reports available in PREP.

1. To generate a report, select the report from the dropdown list.
2. Multiple filters are available to fine tune a report.
   a. Select "Not Used" if you do not wish to filter the report by a given topic. The report will show the variable but will not filter by it.
   b. Select multiple options to filter by holding down the "Ctrl" key while clicking on filter terms.
3. The "Date Range" button allows you run a report for a specific period, like a term.
4. You can choose to view your results in PDF format or in CVS/Excel. The Excel version allows you to apply filters and sort the data. For example, a coach could run one report on all student types and then filter the Excel sheet to look at each one without running multiple reports. The PDF version, however, is better if you are looking for a list such as a call list of non-participating students.

Report Types & Definitions

General reports:
1. **General Student Report:** The "General Student" report allows you to search for students in PREP by multiple criteria, including status (active, non-participating, etc.) and student type (e.g. first time student, returning student), and filter students who belong to special service groups or who have a specific service reason. This report allows you to search by term, date range, start term, start year, or anticipated start term. For department and institution managers, these reports can be run with or without a filter by coach so you can see all students in the same way a coach can see their caseload. Some examples of what you could run:
   a. A coach can search their case load for all active students.
   b. A coach can generate a list of names and phone numbers for students who are currently non-participating so they can reach out to those students.
2. **Current Caseload Statuses Report:** The "Current Caseload Statuses" report allows you to view the assigned caseload for every coach within a department. The caseload is described for each coach by student count for each program status (i.e. active, non-participating, transitioned, etc.).
3. **Caseload Activity Report:** The "Caseload Activity" report allows users to view how many PREP activities are created by a coach. The activity identifiers include journal entries, tasks from the action plan, and early alerts. The search will show all coaches within a department or one coach at a time. This can be further filtered to look at actions based on student type and service reasons. The report can be run by term or within a date range. Managers can use this to assess that the features in PREP they expect to be utilized are being used in general or for a particular student population.
4. **Confidentiality Agreement:** This is a print out of the confidentiality agreement that is available at the student intake. If you would like a paper version for a student to sign, use this report to print it.
5. **Counseling/Coach Reference Guide:** The "Reference Guide" lists each of the challenges and associated referrals. This report is helpful during training for coaches to get comfortable with where everything is listed within the resource guide.
6. **Counselor/Coach Case Management Report**: The "Case Management" report allows you to view the students in a caseload or to view all students who are further parsed out by program status, student type, service reasons, or service groups. The report identifies key academic indicators and PREP attributes for each student such as academic standing, financial aid, Cum GPA, Term GPA, if they are currently registered, etc. This report also lists any service reasons. The report can be run by term or date range.
7. **Special Services Report:** This report allows you to run searches for students and see service group(s) they are assigned.
8. **Disability Services Report:** The "Disability Services" report allows you to view students that are provided accommodations based on a disability. The report includes information about the agency providing services. This can be run by term or a date range and can be viewed for all counselors within the department or by a specific counselor.

Journal Reports:
1. **Journal Step Details Reports:** The "Journal Step Details" report allows you to determine students who have completed selected journal details. This can be run by coach or by a whole department. You can search for steps that have been or have not been completed and parse out students based on their program status, student type, service reason(s) or service group(s). The report can be run by term or date range. Examples of how this report might be used are listed below.
   a. Run a report on all students in the academic probation group who have not had a MAP created.
   b. Run a report on all students who entered in fall 2013 cohort who have had a MAP created.
   c. Institutions can use this information to see if MAP is being implemented, managers can use this to see who is creating MAPs, and coaches can use this to see the students they need to contact.

Early Alert Reports:
1. **Early Alert Case Counts Report**: The "Early Alert Case Counts" report shows a summary of early alerts by term. Data is displayed in aggregate form for cases, responses, and status. This report shows the percentage of closed reports.
2. **Early Alert Student Report:** The "Early Alert Student" report allows you to search for students with Early Alerts and determine the number and status of alerts for a department and/or counselor. The statuses show "Open," "Closed," or "Pending." While a status of an alert in a student record does not show "Pending," for this report "Pending" is defined as an open report that has had a response. This may occur if a coach is actively trying to reach the student but has yet to get a response. This report can be further filtered by student program status, type, and service reason, or service group. This report can be run by term or date range.
3. **Early Alert Student Referral Report:** The "Early Alert Student Referral" report allows you to search for students who were referred to specific offices or resources based on the early alert response. This report can be further filtered by student program status and can be run by term or date range. This report can also list a specific coach's referrals or a whole department's referrals. This report can be used to see how work load is being handled and potentially route referrals directly to key departments as appropriate.
4. **Early Alert Student Progress Report**: The "Early Alert Student Progress" report allows you to search for students assigned to a department and/or counselor to compare the number of early alerts for two different terms. The report shows counts of early alerts for each term selected.
5. **Early Alert Student Outreach Report:** The "Early Alert Student Outreach" report allows you to determine the effectiveness of outreach types based on a selected outcome. You can search by coach or department. An ideal way to use this report is to see what methods a coach uses and select the relevant outcome like "student responded." A coach may learn that a student always responds when a text is sent, but never when a letter is sent. This can have policy implications or change the way a coach contacts students.
6. **Early Alert Student Outcome Report:** This report allows you to determine how many students in a coach's caseload or department had a certain outcome: responded, didn't respond, etc. You can filter by student status, type, and service reason or service group. The report can be created by term or date range. This provides counts. A coach can quickly see how many of their students were non-responsive or reached. Each coach can also see how many early alert responses they completed.

MAP Reports:
1. **Number of Courses in Plans:** This report allows you to search maps for subject abbreviations, course numbers, and terms. It looks at all MAPS in the system but it doesn't break them down by advisor. This is a great report to estimate course loads for faculty or administration to see how many students were advised to take a course if you are considering cutting the course.
2. **Number of Plans by Advisor:** This report allows you to see the number of plans by advisor. You can run the search by term or by a date range to see how many maps each advisor created for that time period. Fields include advisor name and count of active plans, inactive plans, and total plans.
3. **Number of Students by Status:** This report allows you to see the total number of students with active MAP plan status. The search criteria allow you to search by subject abbreviation, course number, and course term. This report does not break the list of students by advisor. This report gives an idea of the number of students with an active plan who are enrolled for a particular course.

MyGPS (for Students)

When a student logs in to PREP, the student will see the MyGPS tool. Students can perform multiple functions listed below from MyGPS.

When an advisor sends an intake request to students, students complete the form and save the data. This data is automatically saved in the Intake tool of PREP. The intake request and all other tasks/requests for a student that are assigned by the coach will show up in the right side pane (tasks area) of the tool as shown below.

Students have access to multiple self-help guides and resources to help them overcome their challenges and be successful. They can e-mail their coach with any questions from MyGPS. Students can also see their saved MAP.