



Personal Resource & Education Plan

Faculty/Staff Quick Guide



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 offered. 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.

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.
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.
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's 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.
6. **Manager:** Managers provide similar services as Navigator/Advisor and have additional access to Reports and Caseload Reassignment.
7. **Administrator:** the PREP Administrator is responsible for configuring the application with values and options. This role has access to almost everything and can login 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 Counselors are all given the Confidentiality Level of “Navigator/Advisor”, while Disability Support Service Staff are given the Confidentiality Level of “Disability.” As such, “Navigators/Advisors” 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.

- **Everyone:** default - visible to anyone with access
- **Tutor:** visible to Tutors, Faculty, Navigators/Advisors, and Disability Support Services
- **Faculty:** visible to Faculty, Navigators/Advisors, and Disability Support Services
- **Navigator/Advisor:** visible to Navigators/Advisors, Counselors, and Disability Support Services
- **Disability:** visible to Disability Support Services ONLY

GETTING STARTED

Once your role is established & the Administrator adds you to the system, you will be able to access PREP.

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.
2. Click on the down arrow.
3. Select “Sign Out”.

Getting Around PREP

What you see when you login depends on the role you have been assigned in PREP. For the purpose of this guide, we will use the Navigator/Advisor role.

Screen Layout & Controls

When you login, you will see your home screen.

1. **Main Navigation Buttons** - direct you to other functional areas in PREP.
2. **Student Search & Caseload** - this section 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 alerts will be highlighted in red. Students with an appointment recorded in the system for today will be highlighted in yellow.
3. **Student Record** – when student is highlighted on the left, their information will appear in the large tool area on the right.

Main Navigation Buttons

1. **SSP** – main functional area used to conduct your typical day to day work.
2. **Early Alert** – typically for a Faculty member who has the ability to send an Early Alert about a student. This is not the location a Navigator/Advisor would use to address and respond to Early Alerts.
3. **My GPS** – student interface of PREP. Students are directed to MyGPS by default when logging into PREP.
4. **Reports** – takes you to reports available in PREP and allows view of reports and to run reports.
5. **Manage Users** – 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 Navigator/Advisor role. Users with the appropriate permissions to create a Watch List may add any student, regardless of Navigator/Advisor 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 Navigator/Advisor will also be sent to Watcher. The Watch List feature is available to Navigator/Advisors and Managers by default.

Searching for Students

Student Search – this tool 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 and 2) a list that displays details of students from your search results. You can search for students by name, school ID, caseload, Watch List, etc.

Use the “**Reset**” button to clear the search criteria and search for 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.**

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 an 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 Navigator/Advisor (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 with 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 (Coach), and student type are required to complete the form.

Quick Add

The Quick Add function simplifies the 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 Navigator/Advisor (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.

E-mail, Coach and Coaching History

E-mail, Coach and Coaching History are quick links related to the student record you have selected.

PREP Tools

The tools are located on the left side of the "Student Record." The "Main" tool is required to maneuver the system. The remaining tools are optional. 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 into PREP, the default tool is “Main.”
 2. **Intake:** this tool takes you to the student’s responses for 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 Navigator/Advisor 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 Navigator/Advisor 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 Navigators/Advisors can review and respond to a student’s alert.
 - a. **Early Alert for Navigators/Advisors** – manage Early Alerts issued on any of their students. Navigators/Advisors will see student names highlighted if they have an Early Alert.
 - b. **Early Alert for Faculty** – Faculty members who do not have an Advising role login will only see the “Early Alert” button. Faculty can create an Early Alert for students in their designated classes in this area.
 6. **MAP:** this is where a Navigator/Advisor will create, edit and monitor a student’s MAP (**My Academic Plan**).
 7. **Accommodation:** this is where a Disability Support 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 Navigators/Advisors.
 9. **Notes:** this is a tool that 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.
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Accommodation

The Accommodation tool was created for Disability Support Services to document students’ needs within PREP. The office of Disability Support Services can have their own confidentiality setting that limits access to this information.

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 Navigators/Advisors.

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 Navigators/Advisors to get a comprehensive view of comments/notes/remarks. The notes displayed are “Read Only” and cannot be edited within PREP.

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.

MyGPS (for Students)

When a student logs into PREP, the student will see the MyGPS tool. Students can perform multiple functions from MyGPS.

When a Navigator/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 Navigator/Advisor will show up in the right side pane (tasks area) of the tool.

Students have access to multiple Self-Help Guides and Resources to help them overcome their challenges and be successful. They can e-mail their Navigator/Advisor with any questions from MyGPS. Students can also see their saved MAP.

It is the policy of Jefferson College that no person shall, on the basis of age, ancestry, color, creed, disability, genetic information, marital status, national origin, race, religion, sex, sexual orientation, or veteran status, be subject to discrimination in employment or in admission to any educational program or activity of the College. In compliance with Federal Rules and Regulations, Jefferson College has adopted a procedure for resolving complaints of discrimination. The procedure is available to any Jefferson College student, employee, or applicant who feels that he or she has been discriminated against in employment, student programs, or student activities.

The Disability Support Services Office (DSS) of Jefferson College is committed to the fulfillment of equal educational opportunities, autonomy and full inclusion for students with disabilities. Disability Support Services serves to determine and ensure appropriate accommodations for qualified students with documented disabilities, to assist students in self-advocacy and to ensure compliance with the ADA, ADAAA and Section 504 of the Rehabilitation Act. Students in need of accommodations can contact Disability Support Services at (636) 481-3158; lschmid2@jeffco.edu.

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