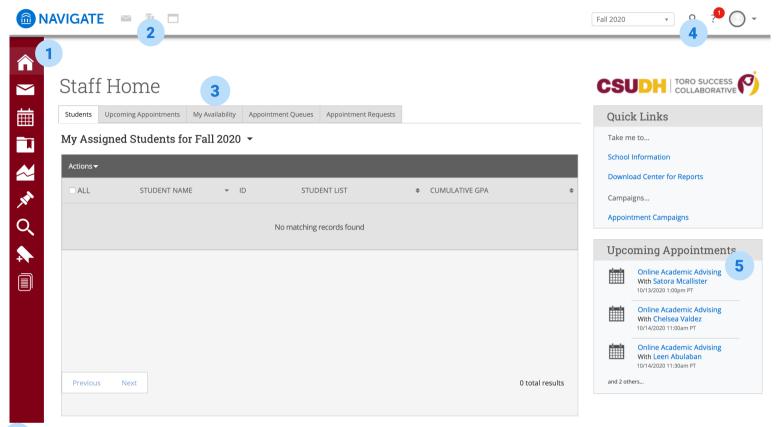


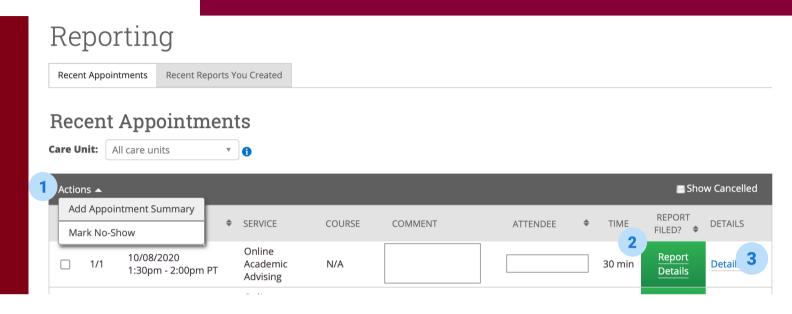
TORO SUCCESS COLLABORATIVE BUSINESS PROCESS GUIDE



- 1 Menu Bar
 - **Home** icon will allow you to return to your Staff Home page.
 - Conversations icon will take you to your TSC message inbox.
 - Calendar icon will allow you to view your appointments and sync your outlook calendar with TSC.
 - Cases icon will show you all open cases for students enrolled in a selected term.
 - Campaign feature allows advisors to run appointment campaigns for selected groups of students.
 - Reminders page will list all reminders that an advisor has issued for students
 - Advanced Search allows advisors the capability to search for students by filtering through a variety of criteria.
 - List and Searches allows advisor to save their students and cohorts in list.
 - Reporting gives advisors access to numerous reports that can be pulled through TSC.
- 2 View Unread Messages, Appointment Queue, and Minimized Dialogs.
- 3 Advisors can set up their **Availability** for student appointments under **My Availability** tab.
- 4 Advisors can **search** for students by name, campus ID number, and Toromail.
- 5 View **Upcoming Appointments** and manage appointment.

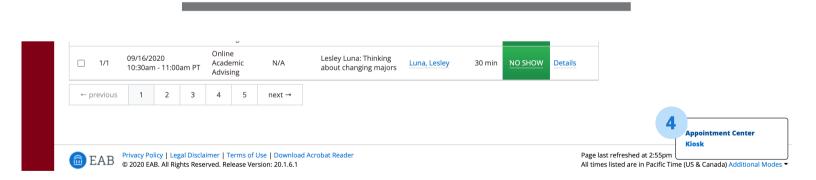


REPORTING AND RECENT APPOINTMENTS



Under Reporting, advisors can see Recent Appointments and Reports created.

- 1 Actions will allow advisors to Add Appointment Summary or mark student as No-Show.
- 2 Report Details will allow advisors to view appointment details and notes.
- 3 Details link will allow advisors to manage appointment, cancel appointment, or delete appointment.



Under Additional Modes, **Appointment Center** and the advising **Kiosk** can be found.

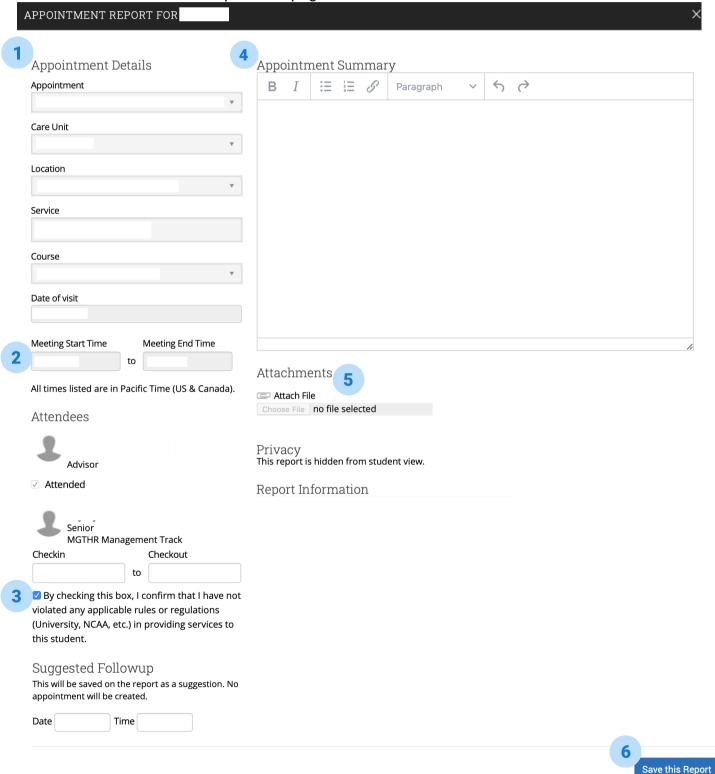
4 Appointment Center feature will allow advisors to schedule appointments for students.

Kiosk feature will allow advisors to check-in their students for their appointments.



ADDING APPOINTMENT SUMMARY

Under the Reporting section on your home page, you will be able to add an Appointment summary by going to actions. Please refer to step one on page two.





ADDING APPOINTMENT SUMMARY

Submitting Appointment Summary

1 Start by adding Appointment Details

Appointment area will show date and time of appointment (auto-populated).

Care Unit area will show Advising (auto-populated).

Location area will allow you to pick your advising location.

Service area will allow you to select from services your advising location offers.

Course area will allow faculty to highlight courses discussed.

Date of Visit area will show date of visit.

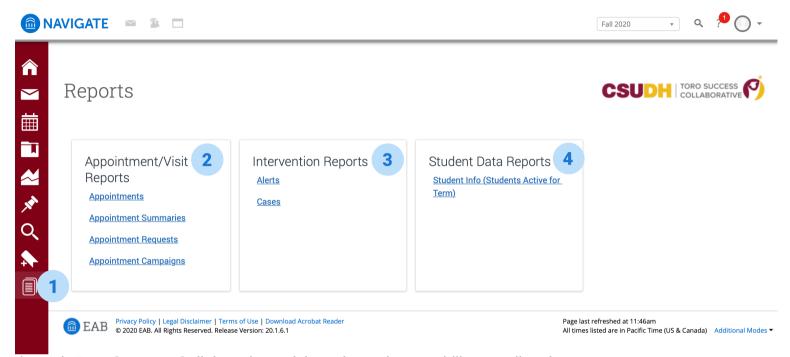
- **2 Meeting Start Time**, **Meeting End Time**, **Checkin**, and **Checkout** sections will allow you to document appointment meeting time details.
- 3 Advisors will need to **check off box** to confirm they have not violated any applicable rules or regulations in providing services to students.
- **4 Appointment Summary** area will allow you to document appointment details, what was reviewed and discussed with student.

Things to keep in mind when submitting advising notes:

- Submit advising notes as soon as possible after advising session.
- Keep things factual, objective and brief.
- When submitting notes include information that will be helpful for students and future advisors.
- Include list of courses recommended and alternatives.
- Include referrals of non-sensitive nature.
- Do not include personal and sensitive information about the student (medical, diagnosed, basic needs).
- Do not include comments made about faculty or staff.
- **Attachments** give advisors the feature to attach documents to the advising summary. Examples of documents that could be attached to advising summary are educational plans, advising contracts, or documents used for advising.
- **6** Save this Report icon will save advising summary and add notes to student's history.



REPORTING



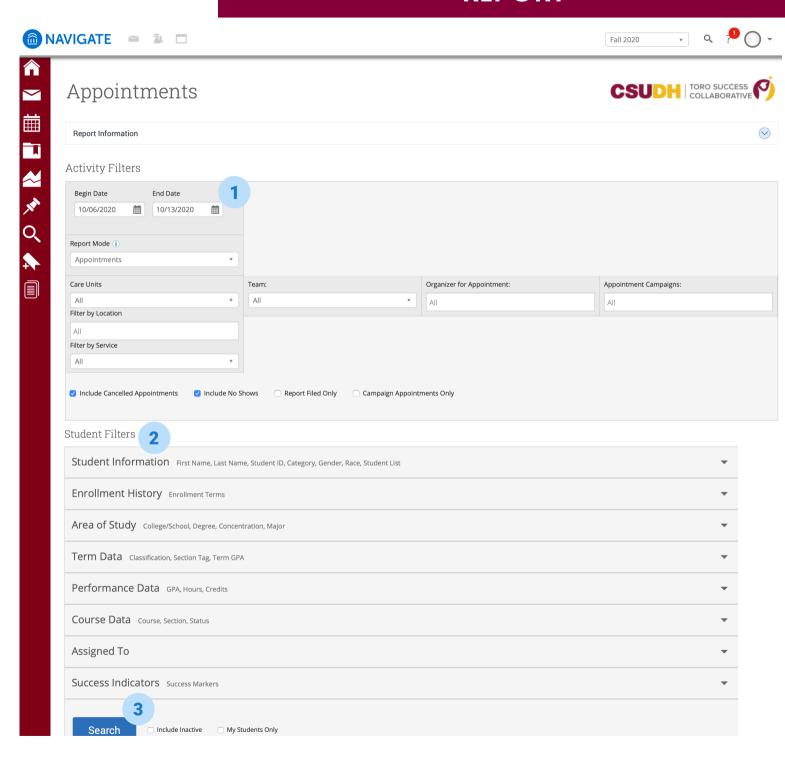
Through Toro Success Collaborative, advisors have the capability to pull various **reports**.

- Under the menu bar you can find **Reporting**.
- Reports under **Appointment/Visit Reports** will allow you to pull data on **Appointments**, **Appointment Summaries**, **Appointment Request** and **Appointment Campaigns**.
- Reports under Intervention Reports will allow you to pull data on Alerts and Cases.
- Reports under **Student Data Reports** will allow you to pull data on **Student Info (Students Active for Term).**

Each report will prompt you to filter (Activity Filters) to find the data you want to access.



EXAMPLE OF PULLING APPOINTMENT REPORT





EXAMPLE OF PULLING APPOINTMENT REPORT

Under Activity Filters you will be able to filter for specific parameters.

- 1 You can filter by Date, Care Unit, Location, Service, Team, Organizer, and Appointment Campaigns.
- 2 Under **Student Filters**, advisors can filter by **Student Information** such as Name, Student ID, Category, Gender, Race, and Student List.

Advisor have the ability to filters students by **Enrollment History**.

Area of Study allows advisors to filter by Academic College, Majors, and Degrees.

Term Data allows advisors to filter by term, credits, GPA, and Classification.

Performance Data will allow you the ability to filter by Cumulative GPA, CSUDH GPA, and Transfer GPA.

Course Data allows advisor to filter by specific course enrollment.

Assigned to filter will allow advisors to pull students who are assigned to specific staff members.

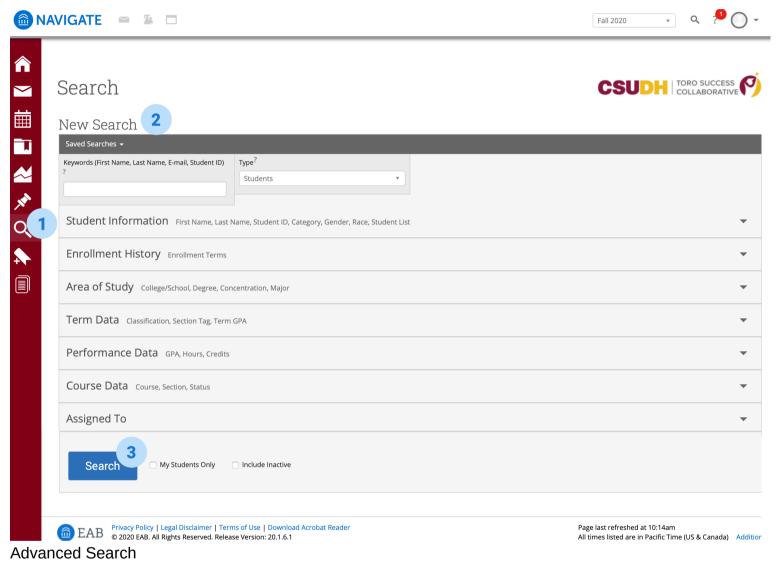
Success Indicators will allow advisors to pull up students by missed success markers.

3 Once advisors have set all filters necessary, they will be able to complete the **Search** and generate a report outlining all appointment that fit their filters.

Under Actions advisors will be able to send a message to students, create an appointment campaign, schedule appointments, add students to list, and export results to an excel document.



ADVANCED SEARCH



- 1 You can find the **Advanced Search** icon on the Menu Bar.
- 2 Advisors can create a new search by using multiple filters.

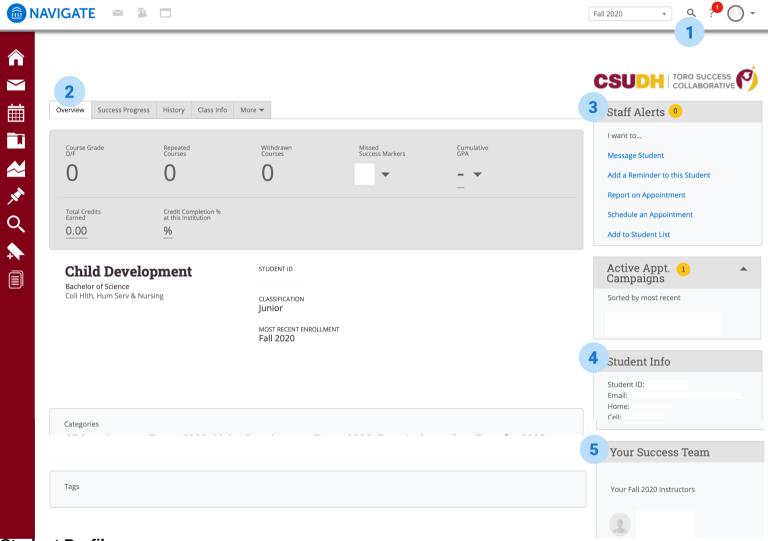
Under filters, advisors can filter by **Student Information, Enrollment History**, **Area of Study**, **Term Data**, **Performance Data**, **Course Data**, and **Assigned To**.

3 Once parameters are set, advisors can complete the data **search**.

Under Actions advisors can Send Message, Create Appointment Summary, Appointment Campaign, Schedule Appointment, Add to Student List, and Export Results.



STUDENT PROFILE



Student Profile

- 1 Student's profiles can be accessed by searching for students using their name, ID number, or Toromail.
- 2 Tabs located toward the top will show you an **Overview** of the student's record, **Success Progress**, **History** (past advising notes, tutoring session, etc.), and **Class Info**.
- Under Staff Alerts, you can find any Alerts issued for this student, message the student, add a reminder to the student, report on appointment, schedule an appointment or add to a student list.
- 4 Student Info will show student ID Number, Email, Home and Cell number.
- 5 You can find the students Success Team which include Advisor and Faculty.



CREATING STUDENT LIST

- 1. Click on List and Searches icon
- 2. Click on New List to add a new list of students
- 3. Name and Save Student List

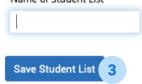


Student Lists





²Adding New Student List



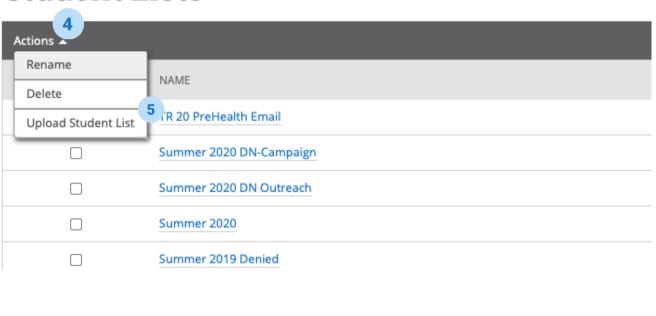




CREATING STUDENT LIST

- 4. Under Actions, select Upload Student List
- 5. Upload student list in CSV format
- 6. Your list is now ready

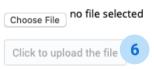
Student Lists



Select a Student List Upload Choose a Column Complete

Upload File to Student List

Please upload a .csv file containing a column of student IDs



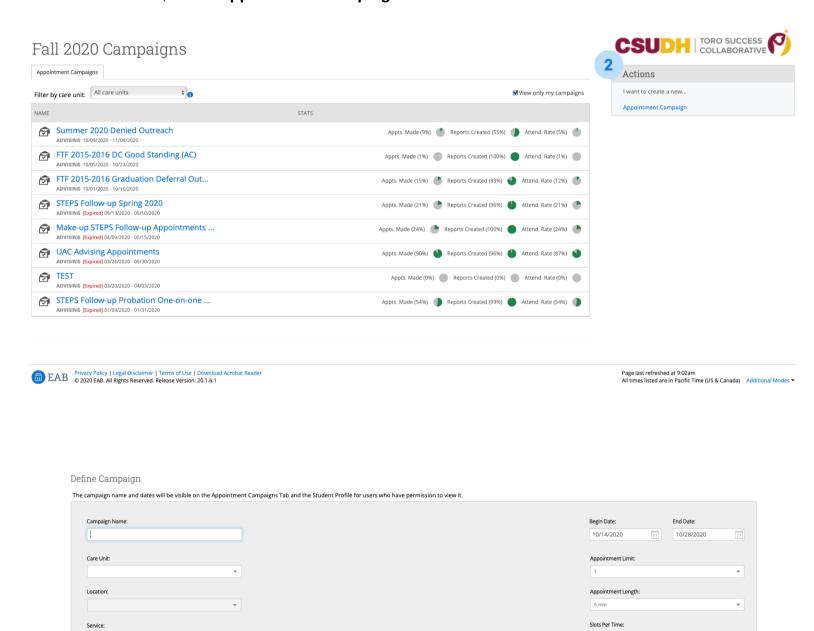
WAYS TO USE STUDENT LIST

- Track student cohort
- Send mass email or text
- Send student campaigns
- Track student groups



i Allow scheduling over courses

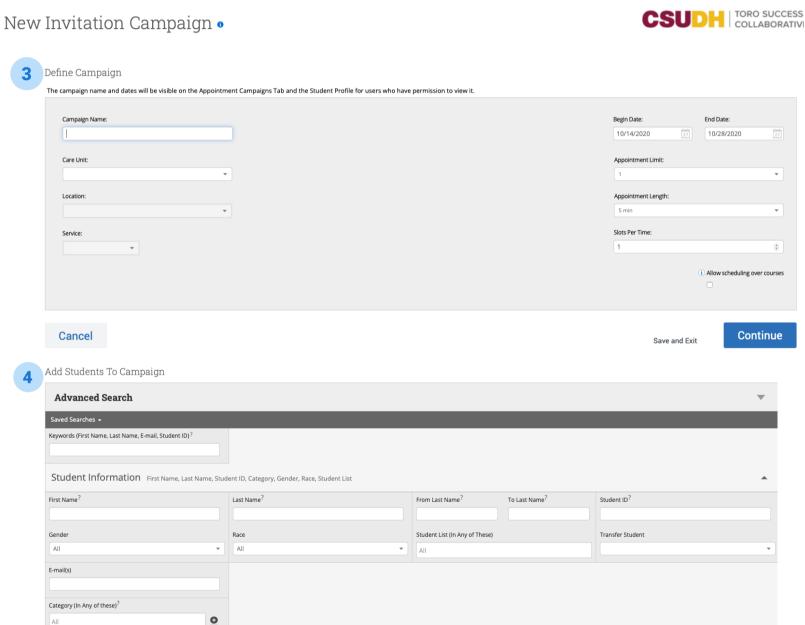
- 1. In your TSC Staff Home, Select Appointment Campaigns
- 2. Under Actions, select **Appointment Campaign** to add a new one





- 3. Define campaign details
- 4. Add students to campaign by selecting student list.



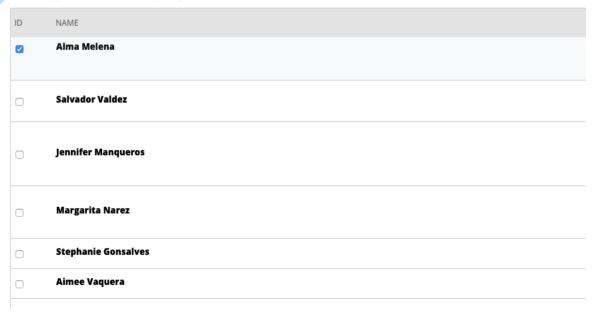




- 5. Confirm and Review Students
- 6. Add Organizer/s (Advisor/s) to support with campaign

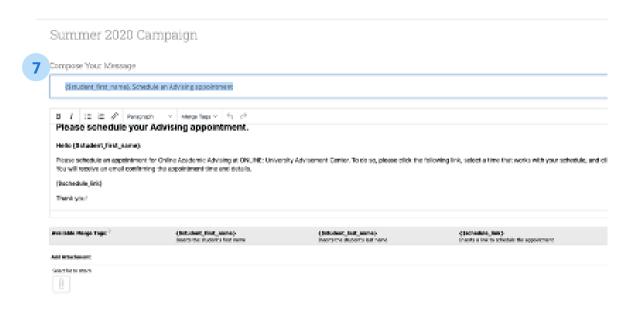
5	w Students In Campaign					
	Actions ▼					
		NAME				
		Absalon, Joy				
		Abundis, Ernesto				
		Acevedo, Eduardo				
		Aguilar, Jesse				
		Aguilar munoz, Linda				
		Aguinaga, Silvia				
		Ahir, Ravin				
		Aispuro, Elias				
		Akhtar, Ahmad				
		Alcala, Danielle				
		Alfana Makanina				
	< E	Back Add More Students				

6 Add Organizers To Campaign

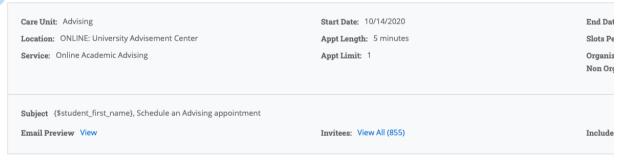




- 7. Compose your message and add any attachments
- 8. Confirm and send campaign



8 Confirm & Send

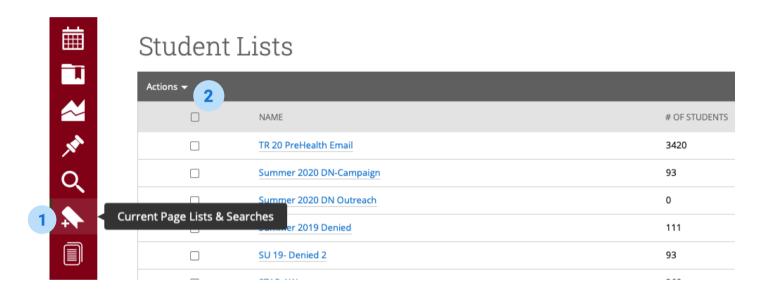


< Back



SENDING MASS MESSAGES

- 1. Click on List and Searches icon
- 2. Select list that you would like to send message to



3. Select students you would like to send message to. If sending to all students in list, click on **Select All**

Back to users lists

TR 20 PreHealth Email

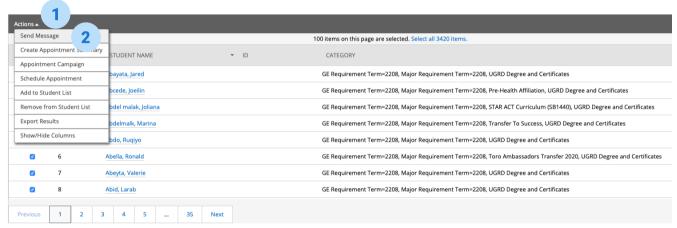
Actions ▼	tions •					
	3	100 items on this page are selected. Select all 3420 items.				
☑ ALL	•	STUDENT NAME	▼ ID	CATEGORY		
	1	Abayata, Jared		GE Requirement Term=2208, Major Requirement Term=2208, UGRD Degree and Certificates		
	2	Abcede, Joeilin		GE Requirement Term=2208, Major Requirement Term=2208, Pre-Health Affiliation, UGRD Degree and Certificates		
~	3	Abdel malak, Joliana		GE Requirement Term=2208, Major Requirement Term=2208, STAR ACT Curriculum (SB1440), UGRD Degree and Certificates		
~	4	Abdelmalk, Marina		GE Requirement Term=2208, Major Requirement Term=2208, Transfer To Success, UGRD Degree and Certificates		
✓	5	Abdo, Ruqiyo		GE Requirement Term=2208, Major Requirement Term=2208, UGRD Degree and Certificates		
✓	6	Abella, Ronald		GE Requirement Term=2208, Major Requirement Term=2208, Toro Ambassadors Transfer 2020, UGRD Degree and Certificates		
v	7	Abeyta, Valerie		GE Requirement Term=2208, Major Requirement Term=2208, UGRD Degree and Certificates		
~	8	Abid, Larab		GE Requirement Term=2208, Major Requirement Term=2208, UGRD Degree and Certificates		



SENDING MASS MESSAGES

- 1. Click on the Actions drop down menu
- 2. Select Send Message

TR 20 PreHealth Email



3. Select Send Email or Send Text

