MY_EADVISOR
ADVISORS MANUAL
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1. DASHBOARD OVERVIEW

Dashboard Home

View and Resolve Alerts

Setup calendar and view appointments

Search/Add note to any student

View new messages or search/send message

Alerts added by instructors

Contact Information

1. Filter for students
2. Default Tab
3. Tab shows major map and academic standing
4. Tab show Major
5. Tab shows admit term and last enrolled
6. Tab shows any appointments or clickable actions
7. Checked if New student
8. Checked if honors college
9. Mass message area
<table>
<thead>
<tr>
<th>Panther ID</th>
<th>Name</th>
<th>Pre-Professional</th>
<th>Major Map</th>
<th>Athletic Participation</th>
<th>Academic Standing</th>
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<tbody>
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<td>PRE-LAW</td>
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</tr>
</tbody>
</table>
### Academic Advising Technology

#### Filter
- Program:
- Plan:
- Sub-Plan:
- Faculty Advisor:
- Admit Type:
- Last Name:
- First Name:
- Panther ID:
- Name:
- Last Enrolled:
- Career Path:
- Athletics:
- Major Map:
- Academic Level:
- Pre-Professional:
- From Admit Term:
- To Admit Term:

#### Advisees
- Select All
- Un-select All

<table>
<thead>
<tr>
<th>Panther ID</th>
<th>Name</th>
<th>Program</th>
<th>Plan</th>
<th>Plan Descr</th>
<th>Acad Sub-Plan</th>
<th>Sub-Plan Descr</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>Plan</td>
<td>Plan Description</td>
<td></td>
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</tr>
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<td></td>
<td>College</td>
<td>Plan</td>
<td>Plan Description</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Advising Technology

**Advisor Dashboard**

**1234567 Undergrad Advisor**

- **Student Alerts**
- **Early Alerts**
- **Advisor Calendar**
- **Advisor Notes**
- **Messages**
- **My Info**

### Filter

- **Program:**
- **Plan:**
- **Sub-Plan:**
- **Faculty Adv.:**
- **Admit Type:**
- **Last Name:**
- **First Name:**
- **Last Enrolled:**
- **Career Path:**
- **Athletic:**
- **Major Map:**
- **Pre-Professional:**
- **From Admit Term:**
- **To Admit Term:**
- **Adviser:**
- **Holds:**
- **Honors:**
- **International:**
- **New Students:**
- **Selected IDs:**
- **Academic Warning:**
- **Probation:**
- **Probation - Reinstatement:**
- **Include DA and DM students:**

### Advises

**Select All**

<table>
<thead>
<tr>
<th>Panther ID</th>
<th>Name</th>
<th>Program Plan</th>
<th>International</th>
<th>Hold(s)</th>
<th>Admit Term</th>
<th>Last Enrolled</th>
<th>Academic Level</th>
<th>Cumulative GPA</th>
<th>Career Path</th>
<th>Faculty Advisor</th>
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<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Spring Term 2014 Fall Term 2003</td>
<td>Senior</td>
<td>1.020</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
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<td>Spring Term 2013 Fall Term 2014</td>
<td>Junior</td>
<td>2.450</td>
<td>Top Year Transfer</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td>Spring Term 2014 Spring Term 2015</td>
<td>Junior</td>
<td>2.450</td>
<td>Top Year Transfer</td>
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<tr>
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<td></td>
<td>Spring Term 2015 Spring Term 2015</td>
<td>Junior</td>
<td>3.020</td>
<td>Top Year Transfer</td>
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<td></td>
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<td>2.100</td>
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<td>Senior</td>
<td>1.880</td>
<td>Top Year Transfer</td>
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<td>Spring Term 2012 Spring Term 2015</td>
<td>Senior</td>
<td>2.070</td>
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<td>9</td>
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<td></td>
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<td>Summer Term 2014 Summer Term 2014</td>
<td>Senior</td>
<td>1.400</td>
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</tr>
<tr>
<td>10</td>
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<td></td>
<td></td>
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<td>Spring Term 2014 Spring Term 2015</td>
<td>Junior</td>
<td>3.420</td>
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<td>Spring Term 2016 Spring Term 2015</td>
<td>Senior</td>
<td>3.040</td>
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<td>1.780</td>
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<tr>
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</tr>
<tr>
<td>14</td>
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<td></td>
<td>Spring Term 2012 Spring Term 2015</td>
<td>Senior</td>
<td>2.260</td>
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<tr>
<td>15</td>
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<td>Spring Term 2010 Fall Term 2014</td>
<td>Senior</td>
<td>2.260</td>
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</tr>
</tbody>
</table>

Last Edited: February 10, 2015
# 2. SETUP

## Advisor Information

1. Click on the “My Info” Tab.

<table>
<thead>
<tr>
<th>My Info</th>
<th>GSA Advisor</th>
<th>Student Alerts</th>
<th>Early Alerts</th>
<th>Advisor Calendar</th>
<th>Advisor Notes</th>
<th>Messages (1)</th>
</tr>
</thead>
</table>

2. Add/Edit Campus, Building, Room, and Telephone.
   - Magnifying glass to add campus and building.
   - Type in Room # and telephone #.

<table>
<thead>
<tr>
<th>Campus</th>
<th>Building</th>
<th>Room</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>PC</td>
<td>1010</td>
<td>305/348-2000</td>
</tr>
</tbody>
</table>

3. Add a location by clicking on + and remove a location by clicking on -.

4. Once done, click **Save**.

When campus is set to chat, a new chat link field is required. This will be used for Adobe Connect.

5. Set Away Message by check marking Out of Office and typing a custom message.

6. Once done, click **Save**.
Advisor Calendar

1. Click on the “Advisor Calendar” tab.

2. Click [add availability].

3. Fill out the “Availability Form”:
   - Begin Date
   - End Date
   - Days – Multiple availability combinations allowed
   - Start Time
   - End Time
   - Duration (15/20/30/45/60 minutes)
   - Appointment (Appt) Type:
     - Appointment Only
     - Blocked
     - Walk-In
     - Chat by Appointment
     - Chat by Walk-In
   - Location (if multiple locations were listed)
   - Building (if multiple locations were listed)

4. Click [OK].

5. A new window will open. Click [OK].
3. GSI ADVISEES TAB

A. **New Student**—When this column is checked a new student has been assigned to the advisor within 14 days.

The flag is removed once there is any contact between the student and advisor or 14 days have passed.

B. **Honors**—When this column is checked it indicates the student is an Honors student.

C. **Pre-Professional**—When this column is checked it indicates the student is a Pre-Professional student.
### D. Major Map Indicator
When this column is checked it indicates whether or not the student has a Major Map.

Continuing students will have the Dashboard feature but not the interactive Major Map.

### E. Athletic Participation
When this column is filled it indicates the student is an athlete.

### F. Academic Standing
Shows the current status of the student.
G. **Program Plan**—
This displays the major that was assigned.

<table>
<thead>
<tr>
<th>Student ID</th>
<th>Name</th>
<th>Program Plan</th>
<th>Plan Descr</th>
<th>Acad Sub-Plan</th>
<th>Sub-Plan Descr</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>College Plan</td>
<td>Plan Description</td>
<td></td>
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<td>College Plan</td>
<td>Plan Description</td>
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</tr>
</tbody>
</table>

H. **Major Map**—
Displays the Major Map Career Path. Clicking on the link will allow the advisor to change the student’s designated career path.

1. Click on the link. A new window will open.
2. Change the career path.
3. Press **Save**.

Once done, close the Major Map window to go back to the Advisor Dashboard.
I. **Next Appointment** – Shows the next appointment of the student, if any.

If the student included an appointment reason, the appointment will display as a link, and a popup will appear when clicked.

J. **New Message** – Send a message to a student by clicking the envelope icon.

1. Select “Subject” and type message.

2. Once done, press **submit**.
K. **View messages** – All messages for that particular student.

1. Click on the message or Click **[View]**.

2. A new window will open with the student’s information prepopulated.

   Once done, close the Messages window to return to the Advisor Dashboard.

---

L. **New Note** – Add a new note for a particular student.

   Click **[Add]**. A new window will open.

   1. Click **[Search]** to find the appropriate reason.

   2. Select reason then press “Add.”

   3. **Majors being advised for (A1)** – Optional area to advise for other majors.
4. **Courses**—
   (B1) Select the Term and (B2) Add Courses.

For multi-term registration, click the (B3) to remove term.

5. **Referrals (Optional)**—
Search for the referral needed (C1). Add necessary Resources (C2).

6. **Topics**—
Checkmark topics discussed during the interaction (D1).

7. **Comments (E1)**—
These comments can be viewed by students in their dashboard.

8. **Advisor Only Comments (F1)**—
These comments can only be viewed by other advisors and do not appear on the student dashboard.

9. **Notify Assigned Advisors (G1)**—
This will send an email to the student’s assigned advisor that a new note was created.

Once done, click
and close the window to go back to the Advisor Dashboard.

* Notes created within the student alerts tab will display any pending alerts for the student chosen.

M. View Notes –
All notes for that particular student.

1. Click on the note or Click ![note](image).

2. A new window will open. The student’s information will prepopulate.

Once done, close the Advisor Notes window to go back to the Advisor Dashboard.

N. Student Dashboard --
Click ![student](image) to switch to the student’s dashboard.

A new window will open.

Once done, close the Student Dashboard.
window to go back to the Advisor Dashboard.

O. Student Center – Displays student center (My Advisees).
4. FILTER AND MASS MESSAGING

1. Filter by single or multiple combinations to select the population you are looking for.

2. Checkmark each student you will send an email to or click “Select All” to mark all students.

3. Select a subject and type a message and click “Submit.”

4. Confirm the selection and click “Yes.”
5. STUDENT ALERTS

1. Click on the “Student Alerts” Tab.

2. Filter by any single or multiple combinations to select the population you are looking for.

   **Positive**– Alerts that do not affect the progress of a student. Examples are scholarships and internships.

   **Negative**– Alerts that affect student progress. Examples are grades and GPA.

   * Check marking multiple rows for a student will only send one message but will update all the rows selected.

3. Click to view the details of the Alert. This will show you the description in a new page. Click “Return” to go back to the dashboard.

4. Contacted is checked when a message is sent, a note is created or it is manually checked. This is...
checked when the advisor attempted to make contact with the student.

Completed is checked when the student met with the advisor and correct measures were taken.

5. Comments are used to keep notes on any particular case.
6. EARLY ALERTS

1. Click on the “Early Alert” Tab.

2. Filter if necessary. By default current advisor and current term are the filters.

3. Details of alerts can be seen by clicking 📋.

4. Status can be changed from pending by either sending a message or creating a note. A note will allow you to update the alert to reflect it having been resolved.
7. **ADVISOR CALENDAR**

5. Click on the “Advisor Calendar” Tab.

6. Filter by any day, time, appointment (appt) type, or Panther ID. Tab to refresh table below.

<table>
<thead>
<tr>
<th>Filter Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Date: 08/01/2015</td>
</tr>
<tr>
<td>Start Time: 8:00AM</td>
</tr>
<tr>
<td>Appt Type:</td>
</tr>
<tr>
<td>Panther ID:</td>
</tr>
</tbody>
</table>

7. The Panther ID column that contains an ID indicates a student’s appointment.

<table>
<thead>
<tr>
<th>Appointment</th>
<th>Panther ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>By Appointment Only</td>
<td>12/11/2015 10:00AM</td>
</tr>
<tr>
<td>By Appointment Only</td>
<td>12/11/2015 1:30PM</td>
</tr>
<tr>
<td>By Appointment Only</td>
<td>12/11/2015 3:30PM</td>
</tr>
<tr>
<td>By Appointment Only</td>
<td>12/11/2015 5:00PM</td>
</tr>
</tbody>
</table>

8. To create an appointment for a student, type the Panther ID in a blank time slot. Once done, tab out.

An email will be automatically generated to the advisor and student.

If a student is a no show, checkmark the no show flag and tab out. Two no shows are allowed per calendar year.
8. ADVISOR NOTES

1. Click on the “Advisor Notes” Tab.

2. Search for notes for a student by clicking
   ![Search button]

3. A new window will open.
   a. Type the Panther ID to find a particular student.
   b. Click ![Search button]

   Once done, close the Advisor Note window to go back to the dashboard.

4. Add a note for a student by clicking ![New Note button] from the Advisor Note tab.

5. A new window will open.
   a. Type the Panther ID.
   b. Use the magnifying glass to add a Reason.
   c. Click “Add.”
   d. Follow instruction from page 14.

   Once done close the Advisor Note window to go back to the dashboard.
9. MESSAGES

1. Click on the “Messages” Tab.

2. If the Messages tab has a number, this indicates how many new unread messages there are.
   
   Click on the message to view its content.
   
   * A reminder that the away message is turned on.

3. To hide a message click on the “Hide” checkbox.
   
   To unhide messages click “View Hidden Messages.”

4. To flag a message for follow up, click on the “Follow Up” checkbox.
   
   To view messages flagged as follow up click “Marked for Follow-Up.”

5. Search for messages for a student by clicking
6. A new window will open.
   a. Type the Panther ID to find a particular student.
   b. Click .
   Once done, close the Advisor Notes window to go back to the dashboard.

7. Add a message for a student by clicking from the Messages tab.
   a. Type the Panther ID.
   b. Click .
   c. Follow instruction from page 7.
## 10. Student Dashboard Search

Viewing a student dashboard not assigned to you can easily be done by using the Student Dashboard Search.

1. **Click**
   - student dashboard search

   A new window will open.

2. **Search by Panther ID or by the student’s Last Name and First Name.**

3. **Click**

   a. The student’s dashboard will open. You will be able to see how the student views his/her dashboard. No changes can be made, such as making an appointment.
11. ADVISOR ASSIGNMENT OVERRIDE

The Advisor Assignment Override feature allows advisors to transfer students from another advisor to themselves. Students can only be overridden to advisors within the same college.

Navigation: FIU Custom → Academic Advising → Use → Advisor Assignment Override

1. Type the student’s Panther ID and click Search.

2. Type your Panther ID in “Advisor ID” and click Save.
12. **FACULTY ADVISOR SETUP**

1. Navigate to FIU Custom ➔ Academic Advising ➔ Faculty Advisor Setup

2. Click “Add New Value.”

3. Find the Panther ID of the Faculty Advisor and click “Save.”

4. In the dashboard the Faculty Advisor field can be found under “Enrollment Info.”