



## Academic Advisor Guide Version 3

Cal State East Bay  
Academic Programs and Services  
April 13, 2020

Bill Irwin  
[bill.irwin@csueastbay.edu](mailto:bill.irwin@csueastbay.edu)

# Table of Contents

---

Overview.....	3
Getting Started.....	4
Advanced Search.....	5
Student Profile.....	9
Success Team.....	14
Advising Reports.....	15
Watch Lists.....	16
Advisor Homepage.....	19
Conversations.....	20
Calendar.....	20
Reminders.....	21
Advisor Availability.....	21
Front Desk Appointment Management.....	23
FAQs and Additional Resources.....	28

## Overview

---

The Bay Advisor, a product from the Education Advisory Board (EAB), is a tool for faculty and professional advisors to identify and track students towards a timely graduation. This student advising platform enables advisors to search for an individual student and groups of students, communicate through email or text, schedule appointments and review student success markers, including missed core major classes, failed coursework, repeated coursework and university requirements. The Bay Advisor provides a versatile platform that drastically reduces the need to pull and analyze individual transcripts. High quality and timely academic advising are always important in CSUEB's student success efforts, especially with our Graduation Initiative 2025 goals.

The Bay Advisor is our system wide tool to help improve student success and increase our graduation rates of both Freshmen and Transfer students.

Graduation Initiative 2025 Goals CSU East Bay		
Metric	2025 Goal	Most Recent Rate
Freshman 6-Year Graduation	62%	45%
Freshman 4-Year Graduation	35%	10%
Transfer 2-Year Graduation	49%	37%
Transfer 4-Year Graduation	83%	73%
Gap - Underrepresented Minority	0	14 % points
Gap – Pell	0	2 % points

Our GI 2025 goal, as outlined in the Graduation Initiative 2025, is 62% Freshmen 6-Year Graduation and 83% Transfer 4-Year Graduation rates. With this enhanced advising platform, advising will play a crucial role in helping East Bay reach our goals.

The Bay Advisor has several advanced functions and features that include, advanced search fields, appointment management, and mass communication methods. This guide will provide you with an overview and instructions of how to use these main features to assist with your advising needs.

If at any point in utilizing The Bay Advisor you have any questions or would like further assistance or training for yourself or department, please contact Bill Irwin, Student Success Specialist, Undergraduate Studies at [bill.irwin@csueastbay.edu](mailto:bill.irwin@csueastbay.edu)

# Getting Started

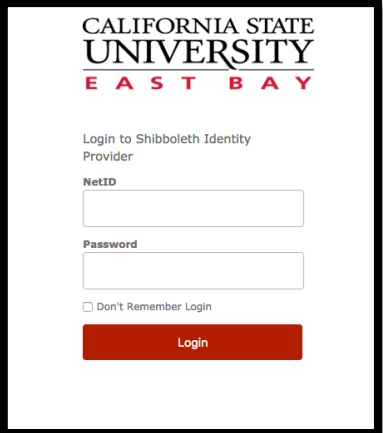
---

## Required Trainings

All users must have completed FERPA (Family Educational Rights and Privacy Act) and DSP (Data Security & Privacy) training to obtain access to The Bay Advisor platform. You can find both trainings through SkillPort. Once complete please email Bill Irwin with certificates of completion along with the new users NetID.

## Logging In

Once FERPA and DSP trainings have been completed, go to [www.csueastbay.edu/bayadvisor](http://www.csueastbay.edu/bayadvisor) to access The Bay Advisor. You will use your single access sign on credentials (NetID and Password) to log in. The first-time logging into Bay Advisor, please type out your password and do not use the saved password that might appear depending on your browser settings.



## Troubleshooting Log In

If you are unable to log in once FERPA and DSP trainings have been completed, please contact system administrator, Bill Irwin at [bill.irwin@csueastbay.edu](mailto:bill.irwin@csueastbay.edu).

## System Log Out

The Bay Advisor will automatically log out users after 60 minutes of inactivity. If the system logs you out, please go back to [csueastbay.edu/bayadvisor](http://csueastbay.edu/bayadvisor) and log in with your NetID and Password. Make sure to log back into The Bay Advisor via East Bay log on page and not the EAB log on page.

# Search



## Quick Search

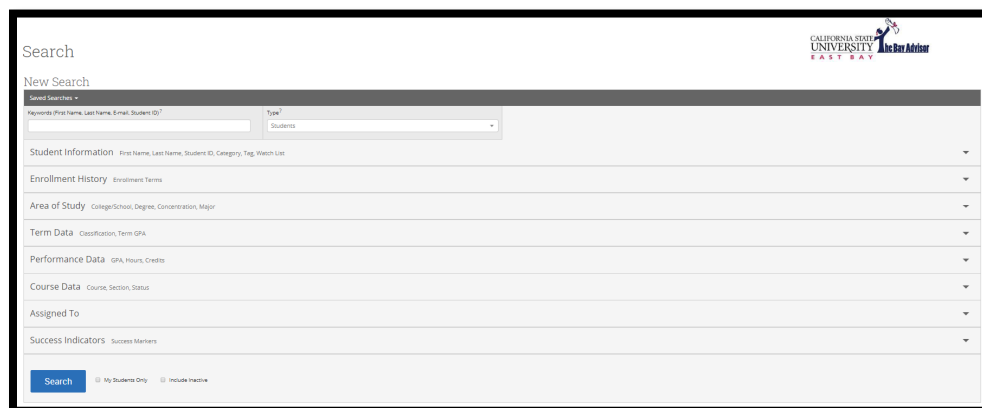
There are two types of searches in The Bay Advisor, a quick search or an advanced search. As an advisor, you can do a quick search from the notification bar at the top of any page. Click on the magnifying glass and enter either a student's first name and last name, or NetID, or Empl ID, or horizon email address.



Performing a quick search allows you to easily search for a student and view their academic performance information if you know their name or NetID. You will be able to view their Student Profile (see page 9), any notes from other advisors, current and previous enrollment information, and much more.

## Advanced Search

Advanced Search gives you the ability to search for groups of students through various criteria. You can control how specific or general of a search you intend to do with the criteria selected through the advanced search feature. Click the “advanced search” button to display all searchable characteristic drawers.



Examples of searchable characteristics include:

- Student Information
- Enrollment History
- Area of Study
- Performance Data
- Term Data
- Course Data
- Assigned To
- Success Indicators

# Search

## Student Information

The screenshot shows a search form titled "Student Information" with a subtitle "First Name, Last Name, Student ID, Category, Tag, Gender, Watch List". The form contains several input fields and dropdown menus: "First Name?", "Last Name?", "From Last Name?", "To Last Name?", "Student ID?", "Gender" (dropdown), "Watch List (In Any of These)" (dropdown), "Transfer Student" (dropdown), "Category (In Any of these)" (dropdown), and "Tag (In Any of these)" (dropdown). Each dropdown menu currently shows "All".

If you organize your advising caseloads by last name, you can search for a selected range of last names within a specific alpha-frame. You also can search for any student assigned to a particular People Soft group within "category".

## Enrollment History

The screenshot shows a search form titled "Enrollment History" with a subtitle "Enrollment Terms". The form contains three input fields: "Enrollment Terms (In Any of these)?", "Enrollment Terms (In All of these)?", and "Enrollment Terms (In None of these)?". Each input field currently shows "All".

Search for specific enrollment terms. Also create an and/or/neither logic to search for specific students. For example – Students enrolled Spring 2020 but not enrolled in Fall 2019. This search will provide you with a list of all students that were enrolled in Spring 2020 but not in Fall 2019.

**Pro-Tip** – When performing an advanced search, always select the current enrollment term in the Enrollment History drawer to run searches for currently enrolled students.

## Area of Study

The screenshot shows a search form titled "Area of Study" with a subtitle "College/School, Degree, Concentration, Major". The form contains four input fields: "College/School (In Any of These)?", "Concentration (In Any of These)?", "Degree (In Any of These)?", and "Major (In Any of these)?". Each input field currently shows "All".

Search for students in specific majors, 2<sup>nd</sup> majors, options, or colleges. This is a great way to find all officially declared majors for direct marketing or outreach.

## Performance Data

Performance Data GPA, Hours, Credits					
Min. Cumulative GPA <sup>?</sup>	Max. Cumulative GPA <sup>?</sup>	Min. Institution GPA <sup>?</sup>	Max. Institution GPA <sup>?</sup>	Min. Transfer GPA <sup>?</sup>	Max. Transfer GPA <sup>?</sup>
0.00	5.00	0.00	5.00	0.00	5.00
Min. Credits Earned <sup>?</sup>	Max. Credits Earned <sup>?</sup>	Min. Hours Attempted <sup>?</sup>	Max. Hours Attempted <sup>?</sup>	Min. Credit Comp. % <sup>?</sup>	Max. Credit Comp. % <sup>?</sup>
0	999	0	999	0	100

Search for students that fall within a specific range of accumulated units, possibly students eligible to graduate within the next year, or search by students with a specific GPA range for either intervention purposes or scholarships.

## Term Data

You can create even more specific parameters when searching for students in a given term. You can search by the term, the GPA at time of selected term, units taken in the given term, and a student's classification (Freshmen, Sophomore, Junior, Senior) at time of given term.

Term Data Classification, Term GPA
Term
Fall 2017
Credit hours greater than <sup>?</sup>
0
Credit hours less than <sup>?</sup>
999
Min. Term GPA <sup>?</sup>
0.00
Max. Term GPA <sup>?</sup>
5.00
Classification (In Any of these) <sup>?</sup>
All
Classification (In None of these) <sup>?</sup>
All

## Course Data

Search for students who were enrolled in specific courses in certain terms. Depending on how transfer courses have been articulated, not all transfer courses are searchable. This is a great place to search for students who may not be following a specific course sequence.

Course Data Course, Section, Status	
From Term	To Term
Fall 2016	Fall 2016
<a href="#">+ Add More Courses</a>	
Course <sup>?</sup>	
All	

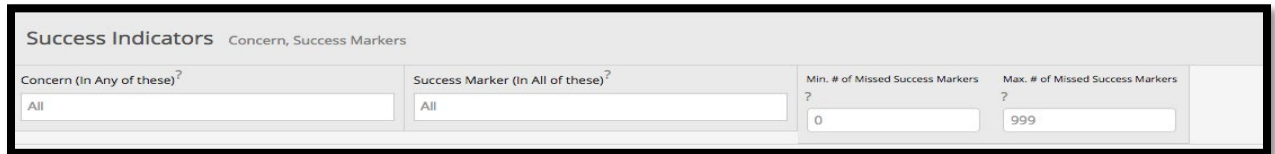
## Assigned To

Search by relationship type and/or advisor for assigned students.

Assigned To	
Student has relationship	
Any	<a href="#">+ More Assignments</a>
Staff	
All	

# Search

## Success Indicators

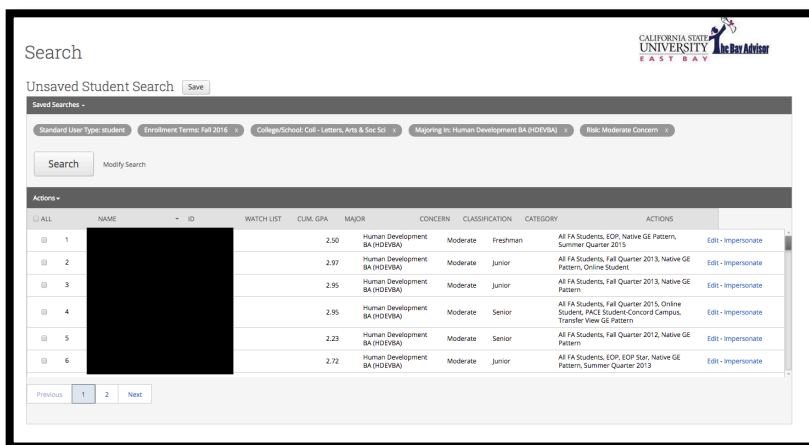


The Success Indicators search form is titled "Success Indicators" with a subtitle "Concern, Success Markers". It contains four input fields: "Concern (In Any of these)?" with a dropdown menu set to "All", "Success Marker (In All of these)?" with a dropdown menu set to "All", "Min. # of Missed Success Markers" with a numeric input field set to "0", and "Max. # of Missed Success Markers" with a numeric input field set to "999".

Search for students of various concern levels – low, medium, high. You can also search for students that have missed a certain amount of success markers within their given major. The Success Indicator drawer is crucial for outreach to students of high concern. This feature will be reworked in the future and might not be fully accurate given transfer course articulations.

## Search Results

Once you have selected all desired search criteria, press “Search”. This will create a list of students with the defined criteria of your search.

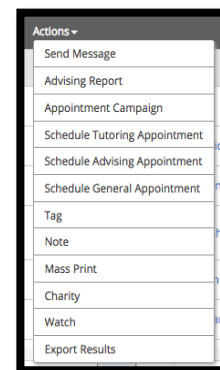


The Search Results table displays a list of students based on the search criteria. The table has columns for Actions, ID, Name, Watch List, CUM. GPA, MAJOR, CONCERN, CLASSIFICATION, CATEGORY, and ACTIONS. The table shows 6 results, with the first 5 rows visible. The first row shows a student with ID 1, Name [REDACTED], Watch List, CUM. GPA 2.50, MAJOR Human Development BA (HDEVBA), CONCERN Moderate, CLASSIFICATION Freshman, and CATEGORY All FA Students, EOP, Native GE Pattern, Summer Quarter 2015. The ACTIONS column for each row contains a link to "Edit - Impersonate".

Actions	ID	Name	WATCH LIST	CUM. GPA	MAJOR	CONCERN	CLASSIFICATION	CATEGORY	ACTIONS
<input type="checkbox"/>	1	[REDACTED]		2.50	Human Development BA (HDEVBA)	Moderate	Freshman	All FA Students, EOP, Native GE Pattern, Summer Quarter 2015	<a href="#">Edit - Impersonate</a>
<input type="checkbox"/>	2	[REDACTED]		2.97	Human Development BA (HDEVBA)	Moderate	Junior	All FA Students, Fall Quarter 2013, Native GE Pattern, Online Student	<a href="#">Edit - Impersonate</a>
<input type="checkbox"/>	3	[REDACTED]		2.95	Human Development BA (HDEVBA)	Moderate	Junior	All FA Students, Fall Quarter 2013, Native GE Pattern	<a href="#">Edit - Impersonate</a>
<input type="checkbox"/>	4	[REDACTED]		2.95	Human Development BA (HDEVBA)	Moderate	Senior	All FA Students, Fall Quarter 2015, Online Student, NACE Student Concern Campus Transfer View GE Pattern	<a href="#">Edit - Impersonate</a>
<input type="checkbox"/>	5	[REDACTED]		2.23	Human Development BA (HDEVBA)	Moderate	Senior	All FA Students, Fall Quarter 2012, Native GE Pattern	<a href="#">Edit - Impersonate</a>
<input type="checkbox"/>	6	[REDACTED]		2.72	Human Development BA (HDEVBA)	Moderate	Junior	All FA Students, EOP, Star, Native GE Pattern, Summer Quarter 2013	<a href="#">Edit - Impersonate</a>

If this is a search you will run regularly, you can save this search. Just click “Save” at the top of the page next to “Unsaved Student Search.” You can then create a unique name for this search and the search will be saved to your searches. *This saved search is not dynamic. It will only save information captured at the time of search.*

From your search, you can perform several tasks such as, send a message (email or text), print search list, create a note or advising report for all students selected from search, add selected students to a watch list, or even export to an excel file. Just select individual students, or all, and click “Actions”.



The Actions menu is a dropdown list of tasks that can be performed on the search results. The tasks listed are: Send Message, Advising Report, Appointment Campaign, Schedule Tutoring Appointment, Schedule Advising Appointment, Schedule General Appointment, Tag, Note, Mass Print, Charity, Watch, and Export Results.

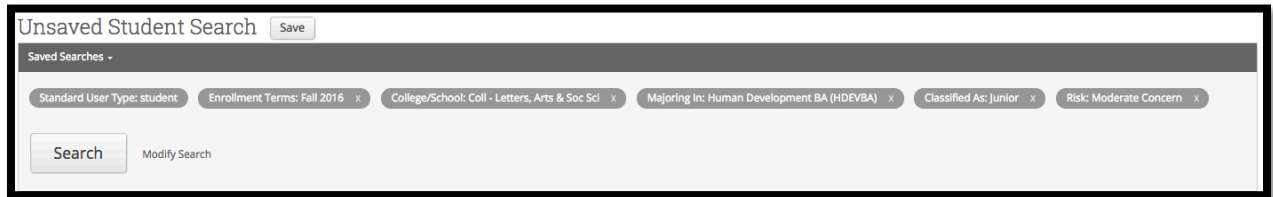


# Search

---

## Modify Search

There are two different ways to modify searches. You can remove various categories from the search you last performed by clicking the “x” next to each category.



You can also click “Modify Search” which will then open the advanced search drawers and you can edit your search criteria directly from each drawer. Once you have selected your desired search criteria, just click “Search” and your newly modified search criteria will be populated.

**Pro-Tip** – When opening a student profile from the search list, open the profile in a new tab. Right click a student’s name, and select open link in new tab. Without performing this function, your search results will not be retained if you press backspace after viewing a specific student’s information.

# Student Profile

## Overview

To view a student's profile, either from Quick Search or Advanced Search, click their name (or right-click their name and open in new tab if from Advanced Search). This will bring you to the student's overview.

Overview | Success Progress | History | Class Info | More ▾

Course Grade D/F: 26 ▾

Repeated Courses: 11 ▾

Withdrawn Courses: 0

Missed Success Markers: 1 ▾

Cumulative GPA: 2.05 ▾

Total Credits Earned: 117.33

Credits Completion % at this Institution: 41%

**History BA (HISTBA)**  
Bachelor of Arts with a concentration in Migration and Globalization (MGLOBA)  
Coll - Letters, Arts & Soc Sci

Major History ▾

STUDENT ID: [REDACTED]

ALTERNATE ID: [REDACTED]

CLASSIFICATION: Senior

MOST RECENT ENROLLMENT: Spring 2020

Categories  
EGT - TBD, Entry Term - Summer Quarter 2012, IAP - Incomplete, Native GE Pattern, Student Housing Active Student

This overview is also referred to as the “30 Second Gut-Check”. It is in this overview that you can quickly assess how a student is performing academically. You can view important information, such as courses a student received a D/F/WU/IC, repeated courses, withdrawn courses, missed success markers, GPA, and more, all in one centralized location. You can also view all categories a student has been assigned.

Categories designate specific characteristics of individual students, such as the term they entered, if they are a Transfer or Native Students, and if they belong to any special programs or sports teams.

To view more details, expand your selection by clicking the arrow next to each number or hover over underlined information to view more details.

Overview | Success Progress | History | Class Info | More ▾

Course Grade D/F: 26 ▴

Repeated Courses: 11 ▴

Withdrawn Courses: 0

Missed Success Markers: 1 ▴

Cumulative GPA: 2.05 ▴

HIST382 Summer Session 2019 F

HIST101 Spring 2019 F

HIST201 Spring 2019 WU

[View All](#)

Bachelor of Arts with a concentration in Migration and Globalization (MGLOBA)  
Coll - Letters, Arts & Soc Sci

Major History ▴

**History BA (HISTBA)**  
Bachelor of Arts  
Enrolled Fall 2018

**Biological Science BS (BIOLBS)**  
Bachelor of Science  
Enrolled Summer 2012

STUDENT ID: [REDACTED]

ALTERNATE ID: [REDACTED]

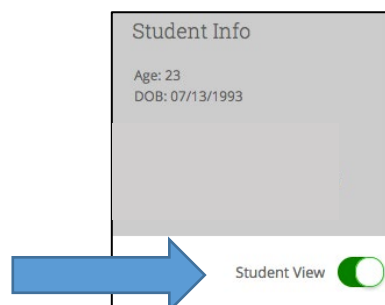
CLASSIFICATION: Senior

MOST RECENT ENROLLMENT: Spring 2020

Categories  
EGT - TBD, Entry Term - Summer Quarter 2012, IAP - Incomplete, Native GE Pattern, Student Housing Active Student

## Student Profile

**Pro-Tip** - When working with a student, you may be inclined to show your screen and use the various pieces of information The Bay Advisor offers advisors. While meeting with a student, make sure you use “Student View” when showing a student information with The Bay Advisor. Student view removes private advising information, such as personal identifying information and concern level, regarding a student.



## Success Progress

The Success Progress tab will provide you with a comprehensive academic summary of the student's performance term to term, as well as progress through the success markers within a given major. This section includes information about student success markers, GPA trends by term, and credits completed by term.

### Success Markers

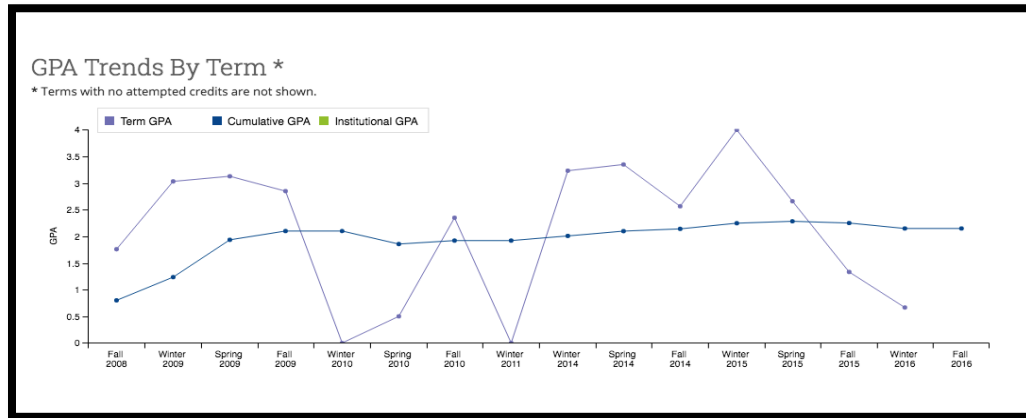
Success markers are customized by faculty for each academic department and represent the core courses that the majority of students take to complete their major. Ideally, these required courses are taken in the middle of students' academic careers (second or third year) to more effectively identify students who may need additional academic support or advising. Each success marker has a recommended grade and a recommended time frame to complete this requirement. Once a student misses a success marker by not completing the course within the designated timeframe or receives a grade lower than suggested, the platform will notify advisors. To view additional information, such as the requirement or the status of an attempt to complete the success marker, click the attempt link which will provide more details.

Success Markers		
The student has missed guidelines for progress. Acting on them can help get the student back on track for successful completion.		
<span>Completed</span> <span>Missing</span> <span>Upcoming</span>		
5 missed markers		
Notification	Outcome	
<b>BIOL1401</b> Recommended grade: B- (1 course) Complete between 30 and 60 credits	Needs attention 1 Attempt	
<b>BIOL3121</b> Recommended grade: C (1 course) Complete between 60 and 90 credits	Needs attention 1 Attempt	
<b>CHEM1101</b> Recommended grade: B- (1 course) Complete between 60 and 90 credits	Needs attention 1 Attempt	
<b>CHEM1102</b> Recommended grade: B- (1 course) Complete between 60 and 90 credits	Needs attention 1 Attempt	
<b>CHEM1103</b> Recommended grade: B- (1 course) Complete between 60 and 90 credits	Needs attention 1 Attempt	

# Student Profile

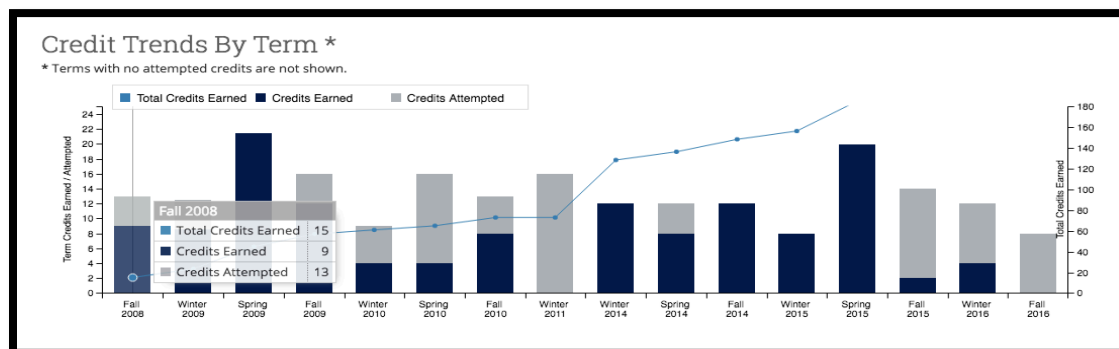
## GPA Trends by Term

You can view a student's GPA trend by term or their cumulative GPA. If you hover over any data point, you will be provided with more information regarding a student's term GPA and cumulative GPA for each term.



## Credit Trends by Term

The Bay Advisor also charts credit accumulation trends by term, similarly to GPA trends. The bar graph allows you to view attempted credits and overall credits per term. The gray within a bar refers to the overall number of attempted credits. The blue within a bar refers to the total credits earned in a given term. To view more information, simply hover over each bar corresponding to a specific term.



In addition to these two graphs, there is a chart showing both GPA and credit accumulations by term.

TERM	TERM GPA	CUM GPA	INSTITUTION GPA	CREDITS ATTEMPTED	CREDITS COMPLETED	TOTAL CREDITS
Fall 2008	1.76	0.8	1.76	13.00	9.00	15.00
Winter 2009	3.033	1.236	2.363	12.50	8.50	23.50
Spring 2009	3.129	1.936	2.813	21.50	21.50	45.00
Fall 2009	2.85	2.101	2.822	16.00	12.00	57.00
Winter 2010	0.0	2.101	2.822	9.00	4.00	61.00
Spring 2010	0.5	1.857	2.346	16.00	4.00	65.00
Fall 2010	2.35	1.922	2.346	13.00	8.00	73.00
Winter 2011	0.0	1.922	2.346	16.00	0.00	73.00
Winter 2014	3.233	2.009	2.527	12.00	12.00	128.50
Spring 2014	3.35	2.099	2.625	12.00	8.00	136.50
Fall 2014	2.566	2.142	2.616	12.00	12.00	148.50
Winter 2015	4.0	2.248	2.743	8.00	8.00	156.50
Spring 2015	2.66	2.284	2.728	20.00	20.00	185.50
Fall 2015	1.333	2.251	2.653	14.00	2.00	187.50
Winter 2016	0.666	2.149	2.463	12.00	4.00	191.50
Fall 2016		2.149	2.463	8.00	0	191.50

# Student Profile

## History

The history tab contains information on Notes, Progress Reports, Advisor Reports, and keeps track of a student's visits to any support center. As an advisor, you will be able to view notes and advisor reports for any given student. It is here you will see which other advisor(s) the student has met with and the content of the meeting. To maintain the coordinated care network we are building at East Bay, this is an important feature to utilize as an advisor. To view an Advisor report or Note, simply click "view" next to the note or report. Notes also contain any historical note of a student. All information in the History tab will be viewed in chronological order. Any note that was entered in PeopleSoft, or the first version of the Student Success Collaborative, has been uploaded into The Bay Advisor. Notes (not advising summaries) entered in either The Bay Advisor or PeopleSoft, will be shared with both systems for accurate note keeping.

## Class Info

The class info tab provides insight into the courses a student is taking in the current term, and also provides an unofficial transcript with important historical academic information, including courses transferred to CSUEB, pre-college exams and scores, and other relevant information.

### Classes this Term

You can view exactly what courses a student is taking in the current term. You will be able to view the course code and name of each class, the instructor on file, course meeting days and time, as well as location for each class.

A great feature in The Bay Advisor is the ability to message an instructor directly from the platform. To send an email message to a professor, select the button next to the name of the class, select actions, and choose send message.

CLASS NAME	PROFESSOR	DAYS/TIMES
ES-384-03-DIS Interracial Sex and Marriage	Steven Cleveland	
PSYC-386-02-LEC Stress & Coping	Steven Ross	T 6:00p-9:00p PST Science Building-S204
SOC-320-02-LEC Social Inequalities	Vibha Puri	M 6:00p-9:45p PST Meiklejohn Hall-4107
SOC-340-02-LEC Sociology of Gender	Emilia Ianeva	TR 3:15p-4:55p PST Meiklejohn Hall-2038

**Pro-Tip** – If a course has no listed day or time, this course is either online or has no specified meeting time.

## Student Profile









### Term Details

Term details provides an unofficial transcript with term by term information regarding a student's academic record. You will be able to view the credit completion rate and GPA at time of each term. Other information included on the unofficial transcript, if applicable, include any Transfer coursework, pre-enrollment data, such as high school name, AP test scores, and other standardized test scores.

Fall 2016 ▾					Term at a glance:	
-- (4)	KIN4614	LEC	Exercise and Well-Being	E	Credits:	-
-- (4)	POSC3703	LEC	American Political Thought	E	Credit Comp %:	-
					Term GPA:	-
					Cum GPA:	2.149
					Academic Standing:	
Winter 2016 ▾						
0 (4)	PHYS3750	LEC	Biophys Tools Hist Med Rorch	F	Term at a glance:	
4	REC3202	SEM	Women and Leisure	C	Credits:	4
0 (4)	WOST3400	LEC	Women and Careers	WU	Credit Comp %:	33%
					Term GPA:	0.666
					Cum GPA:	2.149
					Academic Standing:	Good Standing
Fall 2015 ▾						
2	KIN3540	ACT	Competition Conditioning	A	Term at a glance:	
0 (4)	PHYS3750	LEC	Biophys Tools Hist Med Rorch	F	Credits:	2
0 (4)	REC3202	SEM	Women and Leisure	F	Credit Comp %:	14%
0 (4)	WOST3550	LEC	Women, Work and Family Life	WU	Term GPA:	1.253
					Cum GPA:	2.251
					Academic Standing:	Good Standing
Spring 2015 ▾						
4	MLL3611	LEC	New Chinese Cinema	B-	Term at a glance:	
4	POSC3130	LEC	Urban Politics	C	Credits:	20
4	POSC3204	LEC	Political Systems of Asia	B+	Credit Comp %:	100%
4	POSC3510	LEC	International Security 21st C	B+	Term GPA:	2.66
4	POSC4910	SEM	Political Science Seminar	C	Cum GPA:	2.284
4.5 (3)	HIST9100	TRANSFER	Non-Artic. TRANSFR	(TR)	Academic Standing:	Good Standing

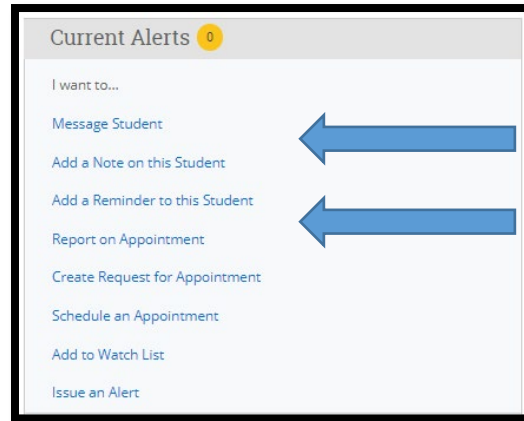
## Success Team

A new feature in Bay Advisor is a students' "Success Team" where all assigned advisors as well as professors for the current term are listed. When building a coordinated care approach, it is important to include as many staff, faculty and other higher education professionals who may potentially interact or be involved with a students' education as possible in communication. The "Success Team" can be found at the bottom right area of a students' overview page.

Your Success Team	
	<b>Irwin, Bill</b> Athletic Advisor
	<b>Lam, Juleen</b> Faculty Advisor
	<b>Pelton, Shane</b> Coach
Your Spring 2020 Instructors	
	<b>Freidenburg, Tess</b> BIOL-271 (1A), BIOL-271 (01)
	<b>Oikawa, Patricia</b> ENSC-280 (05)
	<b>Haynes-Gates, Rahima</b> HSC-130 (01)
	<b>Morewitz, Stephen</b> HSC-250 (03)
	<b>Crain, Crystallee</b> POSC-102 (01)

## Advisor Reports

Advising Summary Reports and Advising Notes give you the ability to record accurate notes regarding an advising session. While in a student's profile, you can create either an Advising Summary Report and/or an Advising note. Simply click "Add a Note on this Student" (Advising Note), or "Report on Advising" (Advising Summary Report) in the upper right-hand box in a student's profile.



### Advising Summary Report (Report on Appointment)

An Advising Summary Report allows you to record a detailed summary of an advising appointment. It is important to document advising sessions and include direct academic information given to a student and any follow-up asked of the student. Remember, this report can be seen by other advisors, and only other advisors, so the more specific with tasks, referrals, and recommendations, the better. An advising summary report will automatically be started with any previously scheduled appointment and include the Care Unit, Location, and Service. Within the Advising Report, you can even attach files, (PDF or Doc) to a student report. A student cannot view information in an Advising Summary Report. Always make sure to include a reason(s) within the appointment details.

A screenshot of a web application's 'Appointment Report for Maya Farkas' form. The form is divided into several sections: 'Appointment Details' on the left, 'Appointment Summary' on the right, 'Attachments' below the summary, 'Attendees' at the bottom left, and 'Suggested Followup' at the bottom right. The 'Appointment Details' section includes fields for 'Appointment' (06/10/2020 11:00a-11:30a PDT - F.A.S.T. Advising), 'Care Unit' (Advising), 'Location' (Athletics Office), 'Service' (F.A.S.T. Advising), 'Course' (Start typing to search all courses), 'Meeting Type' (Select Meeting Type), 'Date of visit' (06/10/2020), 'Meeting Start Time' (11:00am), and 'Meeting End Time' (11:30am). The 'Appointment Summary' section has a rich text editor with bold, italic, and paragraph formatting options. The 'Attachments' section has an 'Attach File' button and a 'Choose File' button. The 'Attendees' section shows two attendees, each with a 'Checkin' and 'Checkout' time field. The 'Suggested Followup' section has a 'Date' and 'Time' field. A 'Save this Report' button is located at the bottom right.

## Advisor Reports

### Advising Notes (Add a Note on this Student)

Advising Notes are a great way to document any additional information to a student's record outside of a traditional advising appointment. For example, you may want to attach a note to a student if you make a change to their advising file that warrants a record. You must always add a Note Reason to an Advising Note for the note to be properly recorded. Notes are uploaded to Peoplesoft Advising Notes nightly and are shared with graduation evaluators.

If you wish to share a note with a student in the platform, you must select the students name under visibility.

**Pro-Tip** – If you want to add private but pertinent information regarding a student, to make the note private and only viewable by you, select only your name under Visibility.

## Watch Lists



Watch Lists allow advisors to create a list of specific students of concern to monitor more closely on a regular basis. Watch Lists can be created directly from search results in The Bay Advisor, or by uploading an Excel Comma Separated Values (CSV) file into The Bay Advisor.

### Creating a Watch List from The Bay Advisor

From the main menu on the left side of screen, select "Lists & Searches".

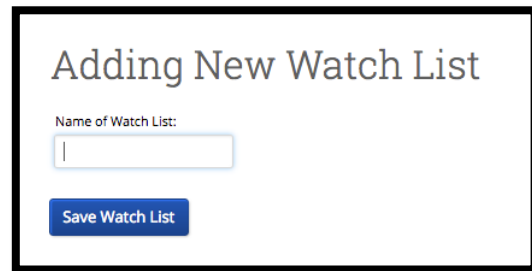


1. Select, "New Watch List" in the upper right-hand corner.

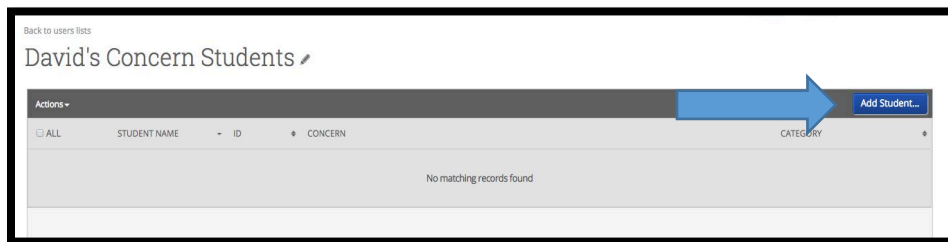


## Watch Lists

2. Create a name for your Watch List. The name should reflect the information of the watch list. For example – Academic Probation Students, High Concern Students, etc.
3. Once you have created a Watch List name, press “Add Students” button to begin adding students to the Watch List. This works well if you know the individual students you want to add.



The screenshot shows a form titled "Adding New Watch List". It contains a text input field labeled "Name of Watch List:" and a blue button labeled "Save Watch List" below it.



**Pro-Tip** – You can always add students to a Watch List from a search or a student’s profile.

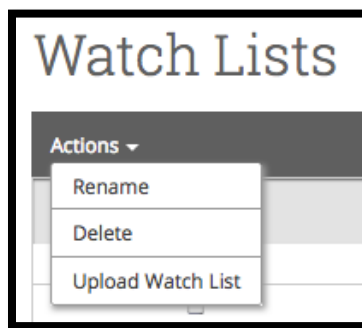
- From a search, select the student(s), go to Actions and press “Watch”.
- From a student’s profile, under the Staff Alerts box, select “Add to Watch List” and designate the specific list.

### Uploading a Watch List to Bay Advisor

If you currently have information in an excel format and would like to monitor this group of students in The Bay Advisor, you can upload this information, with NetIDs, into a Watch List to the Bay Advisor.

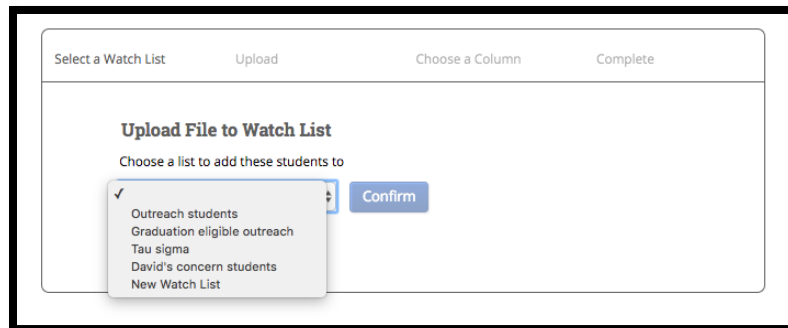
**Pro-Tip** – Make sure to convert an excel file (.xls or xlsx) to a comma separated values (.CSV) file prior to uploading a Watch List.

To upload a Watch List, select Actions – Upload Watch List.



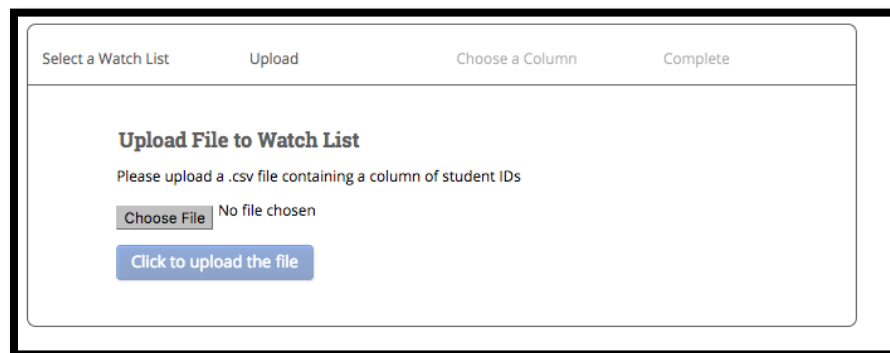
## Watch Lists

1. Choose a List to add these students to:



The screenshot shows a web interface with a progress bar at the top containing four steps: 'Select a Watch List', 'Upload', 'Choose a Column', and 'Complete'. The 'Select a Watch List' step is active. Below the progress bar, the heading 'Upload File to Watch List' is followed by the instruction 'Choose a list to add these students to'. A dropdown menu is open, displaying a list of options: 'Outreach students' (which is selected with a checkmark), 'Graduation eligible outreach', 'Tau sigma', 'David's concern students', and 'New Watch List'. To the right of the dropdown is a blue 'Confirm' button.

2. Choose a CSV file containing a column of student NetIDs.



The screenshot shows the same web interface as the previous one, but now the 'Upload' step is active. The heading 'Upload File to Watch List' is followed by the instruction 'Please upload a .csv file containing a column of student IDs'. Below this, there is a 'Choose File' button and the text 'No file chosen'. At the bottom, there is a blue button labeled 'Click to upload the file'.

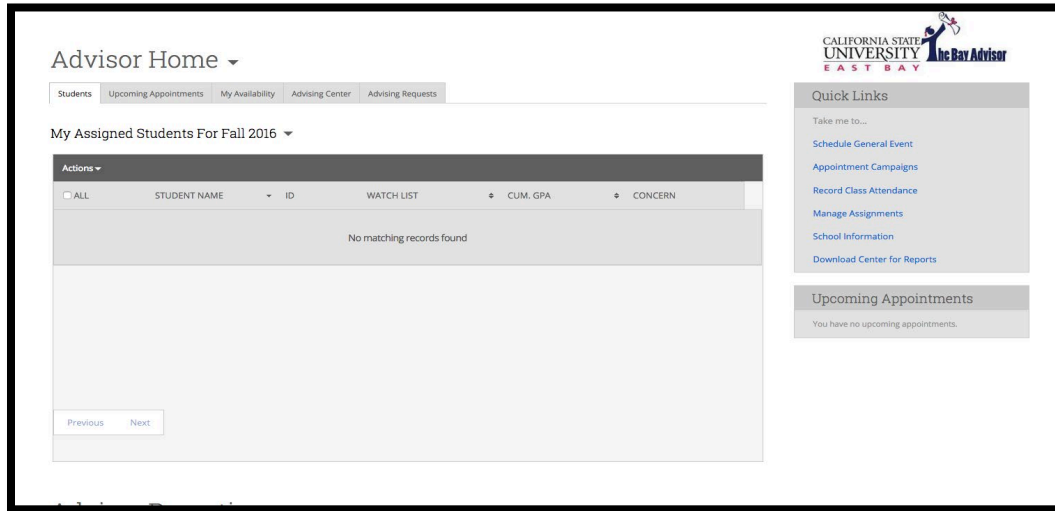
3. If your CSV file has more than one column of data, e.g., first name or last name, select the NetID as the column to import for Student ID.
4. Press Save – You have now uploaded a Watch List from a CSV file.

**Pro-Tip** – Watch Lists may take some time to fully upload. Please allow a few minutes for the file to completely upload before attempting to access your newly created Watch List.

## Advisor Homepage



Once logged into The Bay Advisor, you will land on your Advisor Home. Within this home screen you can view several areas that are applicable to your work as an advisor, including any students assigned to you, an overview of your upcoming appointments, set-up your availability within the appointment system, and manage waitlists of student appointments.



While CSUEB is in the process of formally assigning students to advisors, if you do not have assigned students, you can easily load a list of students to follow-up with. Once a search/watchlist has been saved, you can retrieve this list by clicking the arrow next to “My Assigned Students” (see page 8)

### Notification Bar

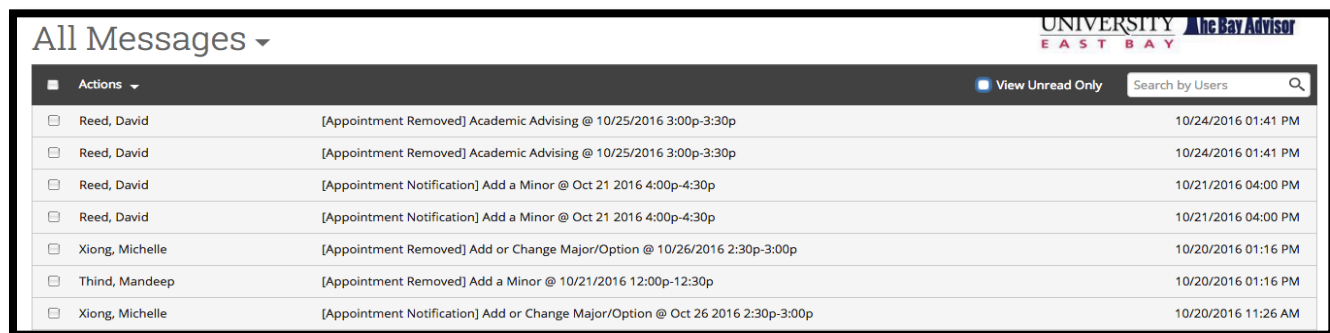
The notification bar, found at the very top of your Bay Advisor, allows an advisor quick access to features such as messages, advising queues, news and announcements, minimized screens within Bay Advisor, quick searches, and various resources from the Education Advisory Board to include the help center.



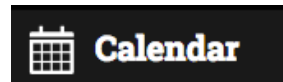
## Conversations



Conversations keeps a record of all messages sent either by you or to you within The Bay Advisor platform. This feature is particularly useful when keeping track of appointment notifications. This feature does not take the place of your official CSU East Bay email. However, this feature can enhance your advising experience by keeping all records from The Bay Advisor in one location. Copies of messages received within The Bay Advisor are also pushed to your official CSU East Bay email, including appointment messages.



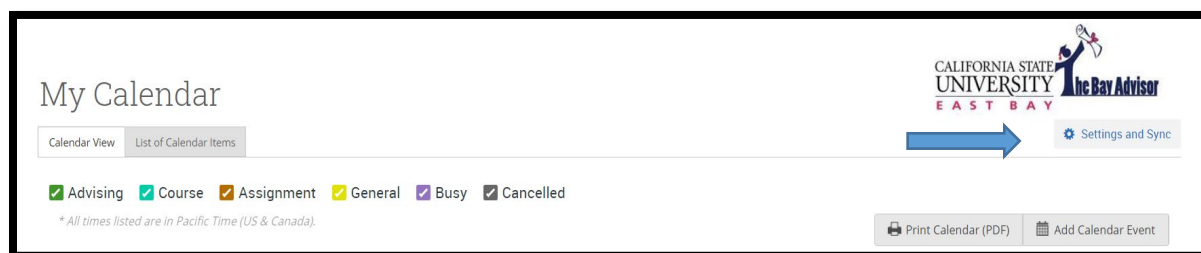
## Calendar



Your Bay Advisor calendar is a great place to view all of your appointments and other events in one place. You can sync your Bay Advisor calendar with your official CSU East Bay Google Calendar, or even other personal calendars you may have. By syncing your calendars, all commitments, including meetings, appointments scheduled on Google Calendar, etc., will over-ride any available windows of times for student appointments or drop-ins. All commitments will be marked as “Busy” on the Bay Advisor platform and appointments will not be scheduled with you during these times.

### Calendar Sync

To sync your calendar, go to My Calendar and select the Settings and Sync link. From there, select “Setup Sync” and then “Google Calendar”.



Choose your CSU East Bay email. Allow Grades First access to your account. Finally, select your CSU East Bay Email address again and press save and update.

**Pro-Tip** – Syncing your Google calendar with your Bay Advisor calendar is highly recommended, especially for maintaining accurate advising appointment availability. Information shared between all synched calendars gives you the ability to see all information in one place. Syncing may take up to 30 minutes during initial

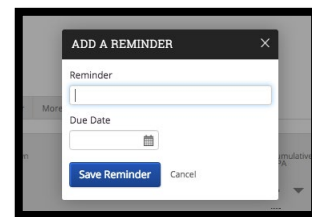
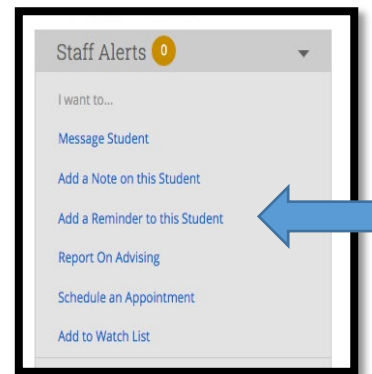
## Reminders



Reminders allow advisors to create a reminder for themselves regarding specific follow-up or tasks following an advising appointment or student interaction. To create a reminder for specific student, in the Student Overview, click “Add a Reminder to this Student” link.

You then can add a reminder and a due date for your reminder. This reminder is for you regarding student follow-up. This reminder does not go to the student.

Once you have created the reminder, press “Save Reminder”. To view all your upcoming or overdue reminders, click the push pin icon in your menu on the left-hand side of the screen. You will then be taken to your reminders.

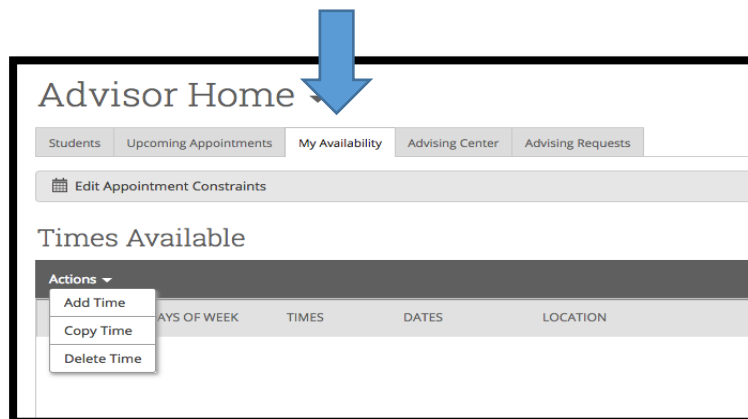


## Appointment Management

A key feature in The Bay Advisor is the ability to create and manage appointments from the platform. Undergraduate Studies encourages all centers to create a specific process for managing appointments and drop-ins. Below you will find information of key features to assist with managing appointments.

### My Availability

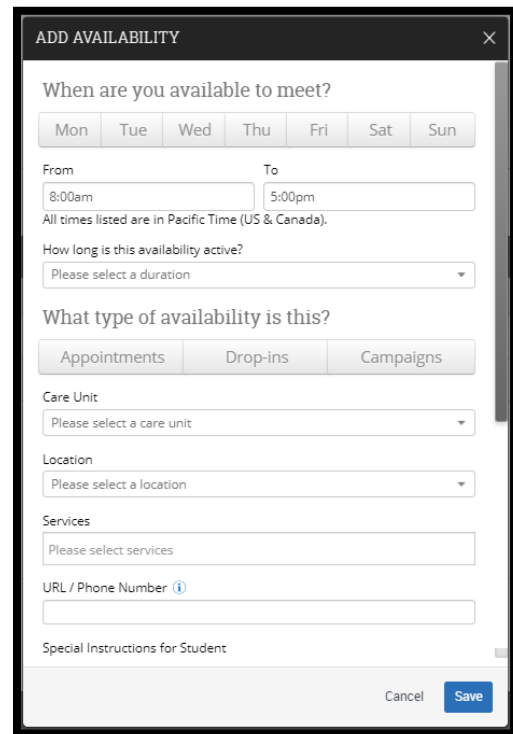
In this tab on the Advisor Home Page, you can set up your availability for advising appointments.



# Appointment Management

To set up an availability window, click “Actions” and then “Add Time” which will bring you to a call out box to create your availability.

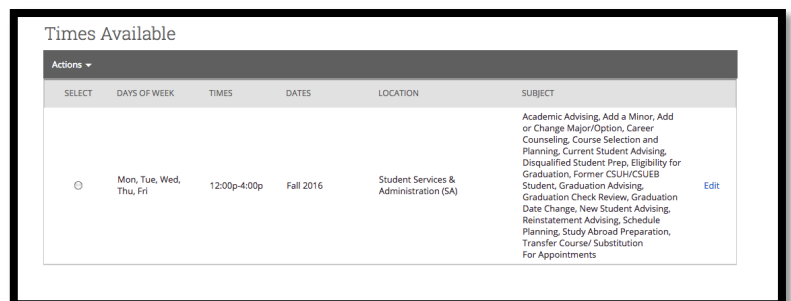
1. Select the days you plan to be available, then adjust the time available for these days.
2. Select the duration for this type of availability – “Current Term, Forever, or a Select Range of Dates”.
3. Select your type of Availability – “Appointments”, “Drop-ins”, or “Campaigns”.
4. Be sure to select your care unit (advising) and location. Finally, select which services you will be available for during this availability.
5. You can enter your personal Zoom URL, or phone number if doing appointments virtually or over the phone.
6. Lastly, enter any special instructions for your students in the text field.
7. Once satisfied, select “Save” to save your new availability.



The student reminder emails (24 hours in advance of the appointment) and student reminder text messages (two hours prior to the appointment) pull the data from here. The email will contain the time of the appointment and include from the information entered here the Location, Service, URL/Phone Number and any special instructions. The text will contain the time of the appointment and Location, Service and URL/Phone Number, but not special instructions.

## Times Available

When availability is complete, you will be able to view your appointment availability. This availability may need to be updated every term or as needed. To edit your availability, select “edit” on the far right.

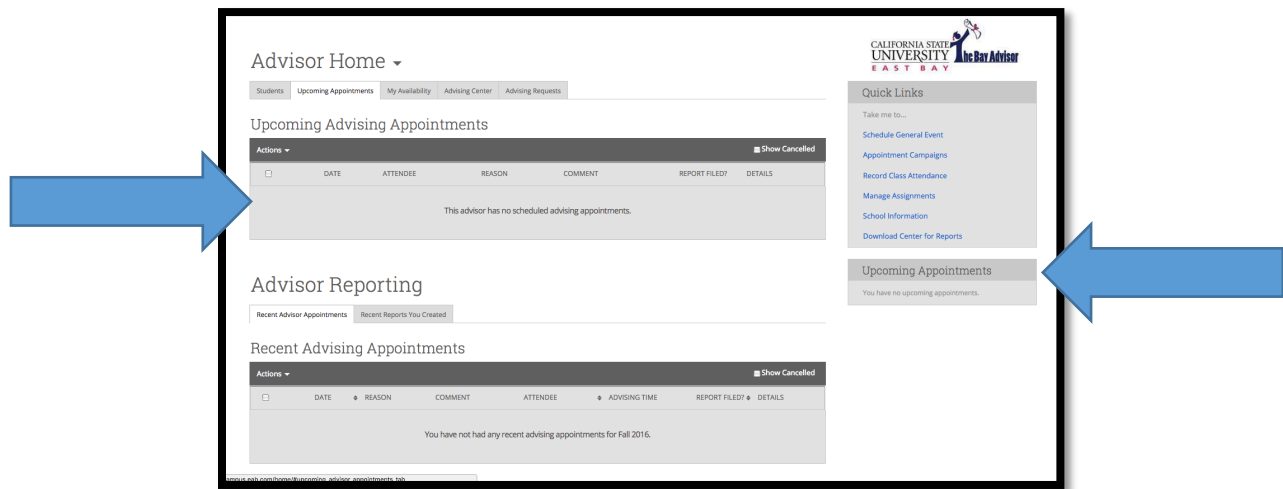


Actions	SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	SUBJECT
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	12:00p-4:00p	Fall 2016	Student Services & Administration (SA)	Academic Advising, Add a Minor, Add or Change Major/Option, Career Counseling, Course Selection and Planning, Current Student Advising, Disqualified Student Prep, Eligibility for Graduation, Former CSUH/CSUEB Student, Graduation Advising, Graduation Check Review, Graduation Date Change, New Student Advising, Reinstatement Advising, Schedule Planning, Study Abroad Preparation, Transfer Course/ Substitution For Appointments	<a href="#">Edit</a>

# Appointment Management

## Upcoming Appointments

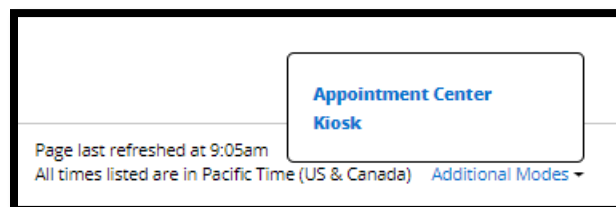
Within this tab, you can view any upcoming appointments for the day, to prepare for your advising sessions. Upcoming appointments are also summarized at the bottom of the right-hand column.



## Front Desk Appointment Management

### Creating Appointments for Students

Once individual advisors have created their appointment availability in The Bay Advisor (see page 19), front desk staff will have the ability to schedule student appointments on behalf of their office. To open and manage the Advising Center, navigate to "Additional Modes" in the bottom right hand corner of your screen. Select "Appointment Center".



# Front Desk Appointment Management


Select the correct location of your center/office.

Choose Appointment Center Location

Appointment Center Name

Available Locations

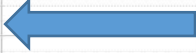
Academic Advising & Career Education in SA 2300	Art Department Faculty Offices
Athletics Office	Biology Department Major Advising
CEAS: HRT & KIN Advising - PE 130	College of Business & Economics Office of Career & Professional Development in VBT 132
College of Business & Economics Office of Undergraduate Advising in VBT 129	College of Letters, Arts, and Social Sciences Student Service Center - MI4006
College of Science Student Service Center North - Science 143	Computer Science & Math Departments - SF 570
Concord Campus	Criminal Justice Faculty Office
Engineering Department	Ethnic Studies Advising
Faculty Office	General Education Office - SA 1500
HDEV Faculty Offices	Health Sciences Faculty Offices SF 502
HP & Student Success A&E 392-C	International Programs - SF 102
Math Lab	Nursing Department
Peer Academic Coaching - SA 1700	Pioneer Success Coaching - SA2300
Project IMPACT - LI 2550	Psychology Offices
S.T.E.P. Office AE 214	SCAA
Sociology Faculty Offices	Student Equity and Success Programs - SF
Theatre & Dance Rob Hall 2nd Floor	Transfer Student Programs - SF 237
University Honors Program	Veterans Advising LI 2200



Once you have selected your correct location, you will see all advisors who have indicated appointment or drop-in availability for the day by the white space shown as available.

Appointment Schedule for December 19, 2017

	Jorge Alvarado Grajeda	Roshawn Campbell	Carolina Hernandez	Belen Menjivar
8 AM				
9 AM		Busy	Busy	
10 AM				
11 AM				
Noon		Busy	Busy	
1 PM	Busy			
2 PM		Busy		
3 PM				
4 PM		Busy	Busy	





# Front Desk Appointment Management

---

## To schedule an appointment for a student

1. Make sure that you are on the Appointment tab.
2. Enter students name or NetID in search box and select student.
3. Select a day for the appointment and then select a time for the student appointment.
4. Once a time for an advisor is selected, this window will appear.

**CREATE AN APPOINTMENT**

Service: Please select a service [Show All Services for this location](#)

Organizer: Roshawn Campbell

Student: Enter Student Name [Create a Student](#)

When: Times listed are in PDT.  
04/21/2020 11:15am 30 min

Comments: Enter comments

Options:

- ☐ Student has checked in for appointment
- ☐ Send E-mail Reminder to the organizer attendee
- ☒ Send E-mail Reminder to non organizer attendees
- ☐ Send Text Reminder to the organizer attendee
- ☒ Send Text Reminder to non organizer attendees

Cancel Create Appointment

5. Select the service (reason) for the appointment and include any comments (ex. Remember Bay Card, print D.A.R., etc)
6. Click "Create Appointment"

The Bay Advisor will send an email confirmation to the student once an appointment has been created, and an automated reminder email will be sent the morning of the appointment along with a text reminder two hours prior to the appointment.

## Checking-in a Student for an Appointment

When a student arrives for a scheduled appointment, as a front desk user/office manager, you can check the student in to notify the advisor their scheduled meeting has arrived.

# Front Desk Appointment Management

## To check a student in for their appointment:

1. Enter a student's NetID or name in the search box.
2. Click "Check-In". The student's name will appear in the advisor's queue and the advisor will receive a notification either by ding, email, or text that their appointment has checked-in.

The screenshot shows a student profile for David Reed (ID: zk3543, email: david.reed@csueastbay.edu, Freshman). It includes links for 'Send Message' and 'Schedule General Event'. To the right is the 'EOP Advising' section with a 'Check-In' button. A blue arrow points from the 'Schedule General Event' link to the 'Check-In' button.

EOP Advising	
When:	Today at 11:00a - 11:30a
Organizer:	David Reed (Administrator, Advisor / Faculty, Student, Tutor / SI, Professor (do not use or delete), Front Desk)
Attending:	
Time:	23 minutes early

3. An advisor can then begin the appointment from their Advising Center on their homepage.

The screenshot shows the 'Advisor Home' page with the 'Advising Center' tab selected. It displays a table of students who have checked in for their appointments. A blue arrow points to the 'Start Appointment' button in the 'Actions' column.

NAME	REASON	TIME OF APPT.
[REDACTED]	General Advising	10:30a-11:00a

4. Once you start an appointment, a report on advising dialog box will open for you to record your appointment notes. If you need to use any features in The Bay Advisor while working with the student, you can minimize this dialog box and return to it when you are ready to add any advising notes. Always add a Reason within the Advising Summary Report.
5. You can find any minimized dialog boxes in the notification bar.



# Front Desk Appointment Management

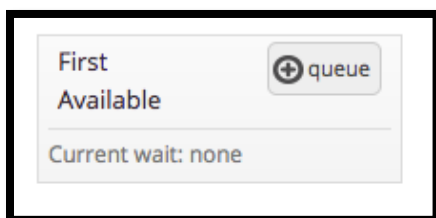
## Drop –In Management and Check-Ins

Drop-in hours are great way for advisors to be able to quickly answer students' questions and/or allow students to see an advisor without an appointment. To check a student in for a drop- in, follow the instructions below.

### To Check-in a Drop-In Appointment

From the Advising Center

1. Select Advisor Waiting Lists tab.
2. Enter a student's NetID or name in the search box
3. Add student to First Available Queue



**Pro-Tip** – In order for a student to be added to a specific advisor's queue, the advisor must have drop in availability for the day.

Once a student is added to either the First Available queue or a specific advisor's queue, all advisor, from their Home Advising Center, will be able to start an appointment with a drop-in student.

Students In My Queue						
Actions ▾						
SELECT	NAME	REASON	COMMENT	FIRST AVAILABLE	PRIORITIZED AT	CHECKED IN AT
<input type="radio"/>	[REDACTED]	General Advising		Yes		1:48p
<input type="radio"/>	[REDACTED]	General Advising		Yes		1:06p
<input checked="" type="radio"/>	[REDACTED]	General Advising		Yes		11:17a

1. Select the student you wish to begin an appointment.
2. Select "Actions: and then "Start Appointment".
3. Starting the appointment will open the dialog box to Report on Advising.
4. Always select a "Reason(s)" for the appointment.
5. Once you have entered your notes in the Advising Summary Report and added any necessary attachments, save the report.

## Frequently Asked Questions and Additional Resources

---

**Q:** Can I customize my home screen?

**A:** Unfortunately, home screens cannot be customized. The layout of The Bay Advisor is fixed feature.

**Q:** Can students see my notes?

**A:** Yes. You need to select the box under visibility with the student's name. To send students the note via email, you need to wait until the next day when the note has been uploaded to PeopleSoft Advisor Notes, and then you can email the note from PeopleSoft out to the student by selecting the appropriate box. Right now students cannot view Advisor Reports.

**Q:** Can I search for students who have taken this course OR that course?

**A:** No. Course search is an "and" only search feature.

**Q:** I cannot find a student in The Bay Advisor. What could be the problem?

**A:** When searching for a student in The Bay Advisor and you are unable to find the student's record, the student may have an inactive status for several terms and will not appear in The Bay Advisor platform or they have not been matriculated AND granted an enrollment date. If you know a student is active and is not appearing in the platform, please contact Bill Irwin, [bill.irwin@csueastbay.edu](mailto:bill.irwin@csueastbay.edu).

**Q:** Who do I contact if I find inaccurate information in The Bay Advisor?

**A:** If at any point you encounter any inaccurate information pertaining to a student's record, please contact Bill Irwin, [bill.irwin@csueastbay.edu](mailto:bill.irwin@csueastbay.edu).

**Q:** I need additional assistance with The Bay Advisor platform. Who can I contact?

**A:** If you, or your colleagues need any assistance or would like a more in-depth overview of any features of The Bay Advisor, please contact Bill Irwin, [bill.irwin@csueastbay.edu](mailto:bill.irwin@csueastbay.edu).

### Additional Resources

As you continue to use The Bay Advisor for your advising and departmental needs, please continue to share your feedback, comments, concerns, and suggestions with Bill Irwin. As a Bay Advisor user, you will receive information throughout the academic year of any updates or further enhancements to The Bay Advisor.

### Navigate Help Center

In the Notification Bar, on the right side is a "?" by clicking on it, you will enter the EAB Navigate Help Center where you will find news on upcoming releases and updates, help articles and how-to's, and other support links for the platform.



### Accessibility

For users that have accessibility concerns or encounter barriers to access with the Bay Advisor, they can contact either [bill.irwin@csueastbay.edu](mailto:bill.irwin@csueastbay.edu) or [as@csueastbay.edu](mailto:as@csueastbay.edu)

**Academic Programs & Services:** [aps@csueastbay.edu](mailto:aps@csueastbay.edu)