Non-Advising Faculty Guide

Version 1.0

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Updated August 2020

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

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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 (bill.irwin@csueastbay.edu) 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 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.
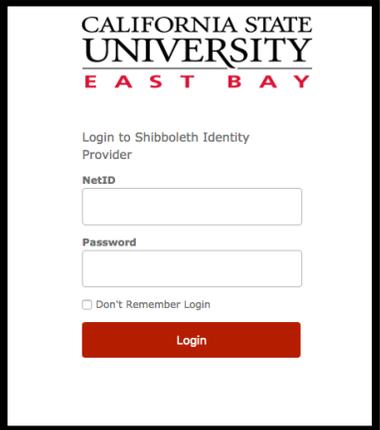
Troubleshooting Log In

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.

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 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.

User Profiles

Bay Advisor has many users and therefore many user profiles or roles. As faculty your standard user role will be "Professor". This can be seen at the top of the page when you login.

Professor Home ▼

If there is a triangle next to the user profile listed, you have more than one user role. Clicking on the triangle will produce a drop-down menu, where if you have multiple roles in Bay Advisor, they will all be displayed.

Professor Home ▲

Staff Home

Student Home

Staff Home is typically the advising home. If you have advising duties, you should also see Staff Home in your drop-down menu. If you do not see it and believe you should, please contact bill.irwin@csueastbay.edu

Student Home is the student portal. If you are currently a student or have been a student at East Bay within the past 10 years, you will also have this user role included on your profile.

> **Pro-Tip** – Students potentially will have multiple roles as well. Use the same drop-down menu to navigate to their student profile page.

Professor Home Page

Once logged into The Bay Advisor you will land on your Professor Home. Within this home screen you can view several areas that are applicable to your work as teaching faculty, including your class listings, the students in all of your classes, students who are assigned to you if you have advising duties, and any students whom you have issued an alert on through either progress report campaign or individual academic alerts.

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 (EAB) to include the help center.

Student Profile

Overview

To view a student's profile, click their name under the "Students In My Classes" section (or right-click their name and open in new tab if opening multiple students). This will bring you to the student's overview.

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 Student, 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.

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. With the "Professor" role, you will be able to view notes and advisor reports for any student in your current classes. It is here you will see which other advisor(s) the student has met with and when. To maintain the coordinated care network we are building at East Bay, this is an important feature to utilize as a faculty member. 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 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.

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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 articulated transfer coursework, pre-enrollment data, such as high school name, AP test scores, and other standardized test scores.

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. From here you can email through Bay Advisor any member of the student's success team by clicking on the envelope icon.

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Conversations

Conversations keeps a record of all messages sent either by you or to you within The Bay Advisor platform. This feature does not take the place of your official CSU East Bay email, but works with it. However, this feature can enhance your communication 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.

All Messages ▾		UNIVERSITY EAST BAY The Bay Advisor
☐ Actions ▾		☐ View Unread Only Search by Users 🔍
☐ Reed, David	[Appointment Removed] Academic Advising @ 10/25/2016 3:00p-3:30p	10/24/2016 01:41 PM
☐ Reed, David	[Appointment Removed] Academic Advising @ 10/25/2016 3:00p-3:30p	10/24/2016 01:41 PM
☐ Reed, David	[Appointment Notification] Add a Minor @ Oct 21 2016 4:00p-4:30p	10/21/2016 04:00 PM
☐ Reed, David	[Appointment Notification] Add a Minor @ Oct 21 2016 4:00p-4:30p	10/21/2016 04:00 PM
☐ Xiong, Michelle	[Appointment Removed] Add or Change Major/Option @ 10/26/2016 2:30p-3:00p	10/20/2016 01:16 PM
☐ Thind, Mandeep	[Appointment Removed] Add a Minor @ 10/21/2016 12:00p-12:30p	10/20/2016 01:16 PM
☐ Xiong, Michelle	[Appointment Notification] Add or Change Major/Option @ Oct 26 2016 2:30p-3:00p	10/20/2016 11:26 AM

Students and advisors will also email you from The Bay Advisor platform. Any emails from the platform will go to both your csueastbay.edu email and can be seen here in the platform. The email will have a specific Bay Advisor format and heading and will be from the user's name via gradesfirst.com. There also might be a spam risk banner in your csueastbay.edu email as it is a mass mailing service and gets flagged by google.
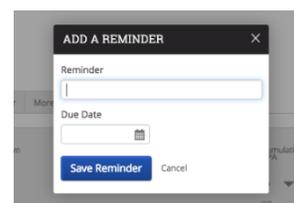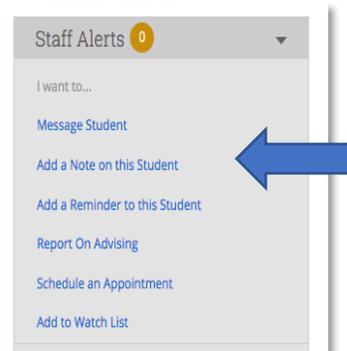
Reminders

Reminders allow users to create a reminder for themselves regarding specific follow-up or tasks following an 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. <u>This reminder is for you regarding student follow-up. This reminder does not go to the student.</u>

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.

Staff Alerts 0 ▾

I want to...

Message Student

Add a Note on this Student

Add a Reminder to this Student

Report On Advising

Schedule an Appointment

Add to Watch List

ADD A REMINDER ✕
Reminder
[   ]
Due Date
[   ] 📅
[Save Reminder] Cancel

Progress Reports & Academic Alerts

Progress Reports

The progress report campaign is conducted by Academic Programs and Services (APS) is typically sent during the 5th week of the semester and stays open through the 9th week of the semester and involves all first-year freshman students and special population students such as EOP, Athletes or probationary students. Roughly 4,000 undergraduate students are part of the campaign. It is voluntary for faculty to participate; however, you are highly encouraged to do so as the reports are sent directly to the students professional assigned advisor who will work with the student with campus resources to improve, and to continue encouragement. The reports are NOT sent to the students, but advisors can and will share the provided information as needed with the students. These reports are part of our efforts to improve retention and graduation rates.

If you have students in your class that are part of the Progress Report Campaign, you will receive an email from Bill Irwin requesting your participation in the campaign. Within the email will be a custom link for you that when clicked will direct you to The Bay Advisor and to your progress reports. If you log into Bay Advisor instead, you will see a banner at the top of the Professor home page:

Click on the "Fill Out Progress Reports" link to go to the requested progress reports.

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If you have no students to mark as "At-Risk" with a current grade of C- or lower, proceed to the bottom of the page and click the light blue button "Submit unmarked students as not At-Risk (I'm all done)" and you will be complete.

|						
22	○ Yes ○ No	Alert Reasons		▲▼		
23	○ Yes ○ No	Alert Reasons		▲▼		
24	○ Yes ○ No	Alert Reasons		▲▼		
25	○ Yes ○ No	Alert Reasons		▲▼		

Submit only marked students (but I'm not done)

This button will submit students you have marked as being complete (effectively removing them from your list of students). However, the students you have not marked will remain on your list. As a result, you can re-use the link in the progress report email, at any time, to continue marking the rest of the students in your classes. Repeat this process until all students have been marked in some form or fashion.

Submit unmarked students as not At-Risk (I'm all done)

This is your "I'm all done" button. It will submit the students you have marked as you indicated. It will also submit the rest of your students as not at-risk. For example, if there are ten students in your course and only two of them are at-risk, you don't have to mark them all. You can mark the two at-risk students and then use this button to mark the remaining students as not at-risk, therefore saving time and effort. Please use this button carefully because with just a single click, it will totally complete your progress report campaign.

If you do have students to mark as "At-Risk", please fill the on-screen options for those students. At a minimum, if you mark a student as "At-Risk" you will need to select an Alert Reason. You can choose to include absences, current grade, or any comments you feel would be helpful to the students assigned advisor.

Thank you!
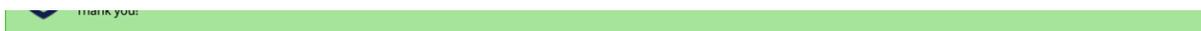
You have been asked to fill out progress reports for students in the following classes. Update each student based on your best knowledge of their performance at this point in the term.

	Student Name	At-Risk to Fail Your Class?	Alert Reasons (You must choose at-least one if the student is at risk)	How Many Absences?	Current Grade	Comments
1		○ Yes ○ No	Alert Reasons		▲▼	
2		○ Yes ○ No	Alert Reasons		▲▼	
3		○ Yes ○ No	Alert Reasons		▲▼	
4		○ Yes ○ No	Alert Reasons		▲▼	
5		○ Yes ○ No	Alert Reasons		▲▼	
6		○ Yes ○ No	Alert Reasons		▲▼	
7		○ Yes ○ No	Alert Reasons		▲▼	

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Once completed with marking your "At-Risk" students, click the light blue button "Submit unmarked students as not At-Risk (I'm all done)" and you will be complete.

If you need to take a break in the middle and return to the requests at a later date, select the dark blue button "Submit only marked students (but I'm not done)" and you will be able to return to the reports at a later date/time by using the original email link or banner message in Bay Advisor.

You will receive an email confirmation once you are complete and have selected the light blue button. If at any time you have questions, concerns or issues with the filling out of the reports, please email bill.irwin@csueastbay.edu.

Academic Alerts

After listening to the concerns of faculty wanting to include students outside of the midterm progress report campaign, APS opened the ability for faculty and staff to issue an academic alert through Bay Advisor to all faculty and staff. If you have issues or questions with the process, please contact Bill Irwin at bill.irwin@csueastbay.edu

Once logged in, scroll down to the "Students In My Classes" list as shown below.

Once the student you wish to Issue an Alert on is selected, you will be brought to their overview page as shown below. Select **Issue an Alert** from the "I want to…" links on the right.

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Once "Issue an Alert" is selected a popup window will appear where you enter the details of the Alert. Please select **ONE** reason, the best reason, for the alert, and please select your course as well. If there are any comments you wish to add to assist the assigned advisor, please enter them. Many times the comments are the most helpful in assisting the advisor with the student case.
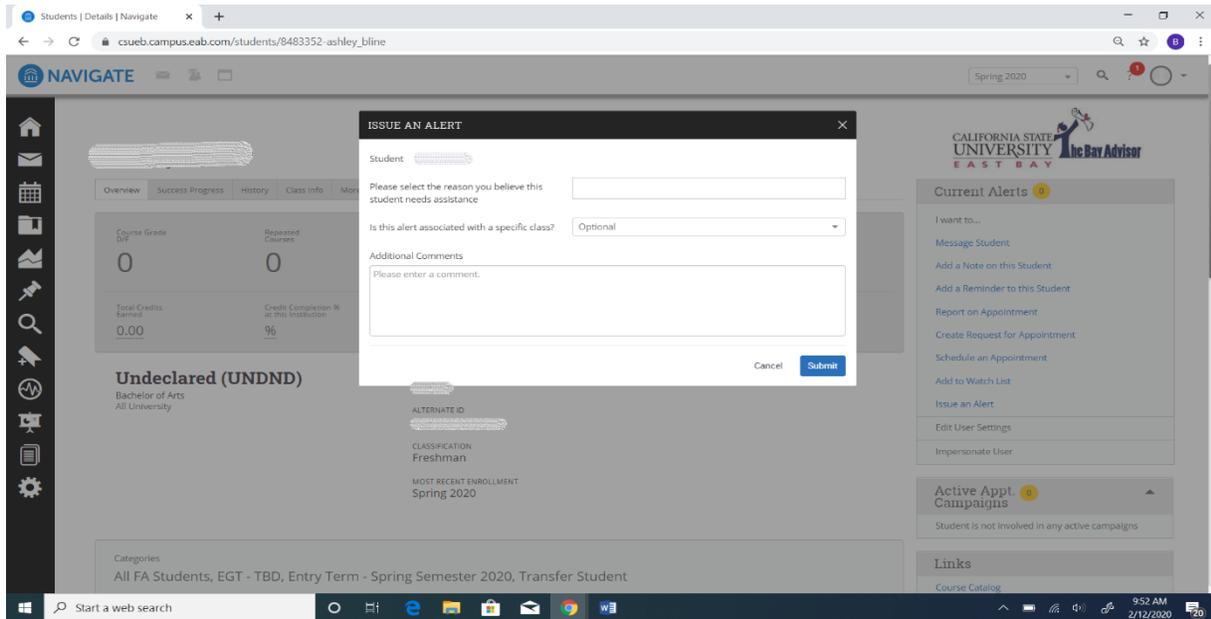
Once the "Issue an Alert" form is filled out and submitted, it will be assigned to an advisor within 48 hours to provide outreach to the student. Typically the assigned advisor is one of the Pioneer Success Coaches. Once the advisor is able to meet with the student, or if the advisor tries to contact the student at least three times and is unsuccessful, the case will be closed, and a follow up email will be sent to the issuer of the alert (you).

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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: 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.

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.

**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.

Additional Resources
As you continue to use The Bay Advisor for you and your departmental needs, please continue to share your feedback, comments, concerns, and suggestions with Bill Irwin.

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.
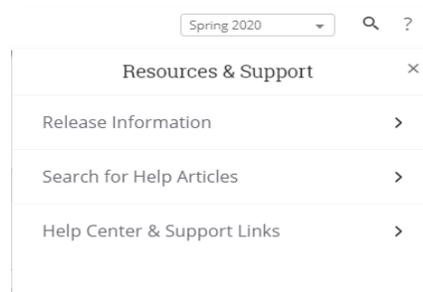
Accessibility
For users that have accessibility concerns or encounter barriers to access with the Bay Advisor, they can contact either bill.irwin@csueastbay.edu or as@csueastbay.edu

Academic Programs & Services: To contact APS please email aps@csueastbay.edu