



Academic Advisor Guide

Cal State East Bay
Undergraduate Studies
February 2017

David Reed, david.reed@csueastbay.edu

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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, 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. Good quality academic advising is especially important now with the University's transition to semesters in Fall 2018.

The Bay Advisor is also a useful tool for Cal State East Bay Graduation Initiative 2025. The Bay Advisor will be used as East Bay's 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 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 differ from the Student Success Collaborative platform you may be used to. Some enhanced features 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 David Reed, Student Success Specialist, Undergraduate Studies at david.reed@csueastbay.edu

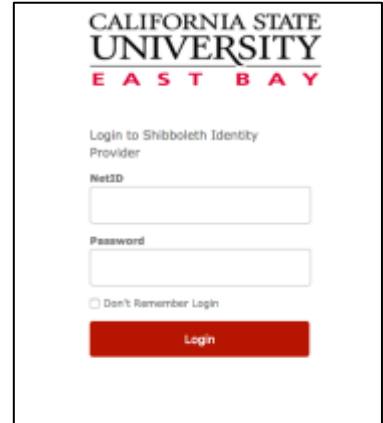
Getting Started

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:

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.



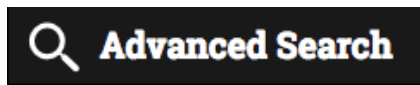
Troubleshooting Log In

If you are unable to log in once FERPA and DSP trainings have been completed, please contact system administrator, David Reed at david.reed@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.

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 or NetID.



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.

A screenshot of the "New Search" interface in The Bay Advisor. It features a "Search" header with the Cal State East Bay logo. Below the header is a "New Search" section with a "Search" button and a "Show Advanced Filters" link. The main area contains several expandable drawers for search criteria: "Student Information" (First Name, Last Name, Student ID, Category, Tag, Gender, Watch List), "Enrollment History" (Enrollment Terms), "Area of Study" (College/School, Degree, Concentration, Major), "Performance Data" (GPA, Hours, Credits), "Term Data" (Classification, Section Tag, Term-GPA), "Course Data" (Course, Section, Status), and "Success Indicators" (Concerns, Success Markers). At the bottom, there are checkboxes for "My Students Only" and "Include Inactive".

Examples of searchable characteristics include:

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

Search

Student Information

The 'Student Information' search form includes fields for First Name, Last Name, From Last Name, To Last Name, and Student ID. It also features dropdown menus for Gender, Watch List (in Any of These), and Transfer Student. Additionally, there are search boxes for Category (in Any of these) and Tag (in Any of these), each with a plus icon for advanced search options.

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 have the ability to search for any student assigned to a particular People Soft group within “category”.

Enrollment History

The 'Enrollment History' search form contains three search boxes for Enrollment Terms (in Any of these), Enrollment Terms (in All of these), and Enrollment Terms (in None of these). Each box has a plus icon for advanced search options.

Search for specific enrollment terms. Also create an and/or/neither logic to search for specific students. For example – Students enrolled in Fall 2016 but not enrolled in Winter 2017. This search will provide you with a list of all students that were enrolled in Fall 2016 but not in Winter 2017.

***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 'Area of Study' search form includes search boxes for College/School (in Any of These), Concentration (in Any of These), Degree (in Any of These), and Major (in Any of these). Each box has a plus icon for advanced search options.

Search for students in specific majors, concentrations, or colleges. This is a great way to find all officially declared majors for direct marketing or outreach.

Search

Performance Data

Performance Data GPA, Hours, Credits					
Min. Cumulative GPA?	Max. Cumulative GPA?	Min. Institution GPA?	Max. Institution GPA?	Min. Transfer GPA?	Max. Transfer GPA?
0.00	5.00	0.00	5.00	0.00	5.00
Min. Credits Earned?	Max. Credits Earned?	Min. Hours Attempted?	Max. Hours Attempted?	Min. Credit Comp. %?	Max. Credit Comp. %?
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 have the ability to 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, and a student's classification (Freshmen, Sophomore, Junior, Senior) at time of given term.

Term Data Classification, Section Tag, Term GPA	
Term	Fall 2016
Min. Term GPA?	0.00
Max. Term GPA?	5.00
Section Tagged With?	All
Classification (In Any of these)?	All
Classification (In None of these)?	All

Course Data

Search for students who were enrolled in specific courses in certain terms. This is a great place to search for students that may be out of step for a specific course sequence, or to check for student's remedial progress.

Course Data Course, Section, Status	
From Term	To Term
Fall 2016	Fall 2016
Course?	All
Add More Courses	

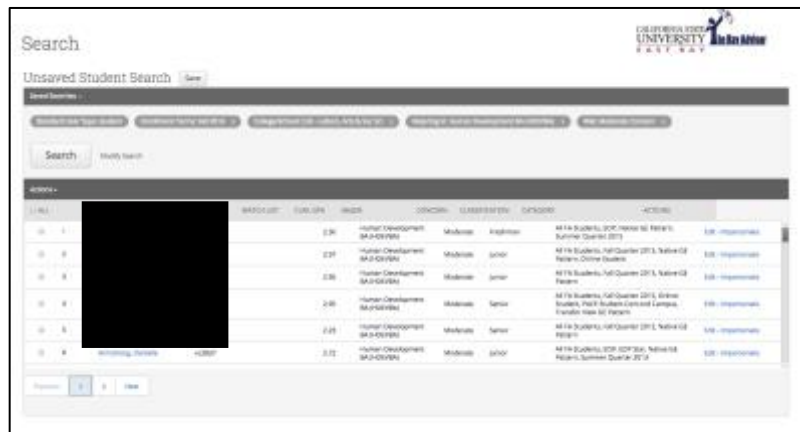
Success Indicators

Success Indicators Concern, Success Markers			
Concern (In Any of these)?	Success Marker (In All of these)?	Min. # of Missed Success Markers?	Max. # of Missed Success Markers?
All	All	0	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.

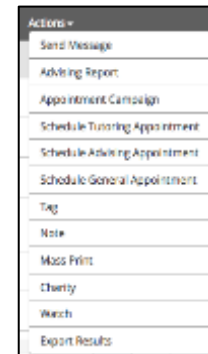
Search Results

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



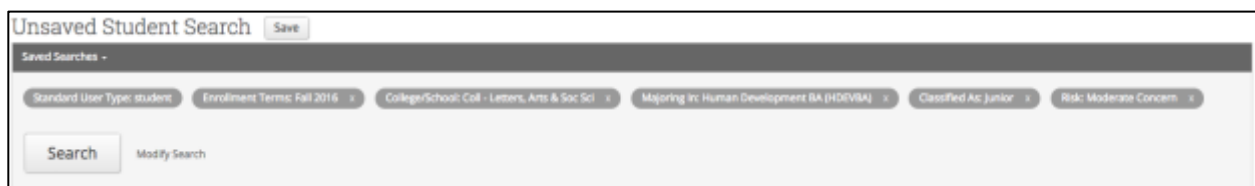
If this is a list of students you will refer to regularly, you can save this search. Just click “Save” at the top of the page next to “Unsaved Student Search.” You can then create a unique name for this search and the search will be saved to your searches. *This saved search is not dynamic. It will only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

From your search, you can perform a number of tasks such as, send a message, 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”.



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.

***Pro-Tip** – For searches that result in a large number of returns, to view total number of students, click the button next to All. This will display a total number of students your search produced.

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.

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 are able to view important information, such as courses a student received a D/F/WU/IC, repeated courses, withdrawn courses, missed success markers, GPA, concern level, 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, their Freshmen Cluster, 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.

The screenshot shows the 'Overview' tab of a student profile. At the top are navigation tabs: Overview, Success Progress, Reports / Notes, Class Info, Major Explorer, and More. Below these are five large statistics: Course Grade D/F (16), Repeated Courses (6), Withdrawn Courses (2), Missed Success Markers (0), and Cumulative GPA (2.149). Each has a small downward arrow. Below these are two more statistics: Total Credits Earned (191.50) and Credit Completion % at this institution (64%). To the right of these is a 'Concern' level of 'High' in red. Below the statistics is the student's name 'Political Science BA (POSCBA)', their College 'Coll - Letters, Arts & Soc Sci', and their Major History. To the right of this is a black box for the Student ID, another black box for the Alternate ID, the Classification 'Senior', and the Most Recent Enrollment 'Fall 2016'. Below this is a section for Advisors and Tutors, which is currently empty. At the bottom is a section for Categories, listing: 'All FA Students, EOP, Fall Quarter 2008, Keeping It Real-Arts and Pop C, Native GE Pattern, Online Student'.

This screenshot shows the same Student Overview page, but with the 'Course Grade D/F' section expanded. It lists several courses: PHYS3750 (Winter 2016), WOST3400 (Winter 2016), PHYS3750 (Fall 2015), REC3202 (Fall 2015), WOST3550 (Fall 2015), POSC3630 (Spring 2014), ENSC2800 (Winter 2011), POSC1252 (Winter 2011), POSC1580 (Winter 2011), and REC3202 (Winter 2011). Each course entry has a status icon (F, WU, C, or D) and a 'View All' link at the bottom. The 'Repeated Courses' section is also expanded, showing PHYS3750 (Winter 2016), REC3202 (Fall 2015), and POSC3630 (Fall 2014). The 'Withdrawn Courses' section is expanded, showing ECON000 (Winter 2010), KPE2016 (Winter 2009), and a black box for the Student ID. The 'Missed Success Markers' section is expanded, showing a Credit Completion % of 64% at this institution. The 'Cumulative GPA' section is expanded, showing an Overall GPA of 2.149, an Institution GPA of 2.463, and a Transfer GPA of 1.212. The 'Advisors' and 'Tutors' sections are still empty. The 'Categories' section is still present at the bottom.

***Pro-Tip** - When working with a student, you may be inclined to 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.

The screenshot shows a 'Student Info' pop-up window. It displays the student's Age (23) and DOB (07/13/1993). At the bottom right of the window is a toggle switch labeled 'Student View', which is currently turned on (green).

Student Profile

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.

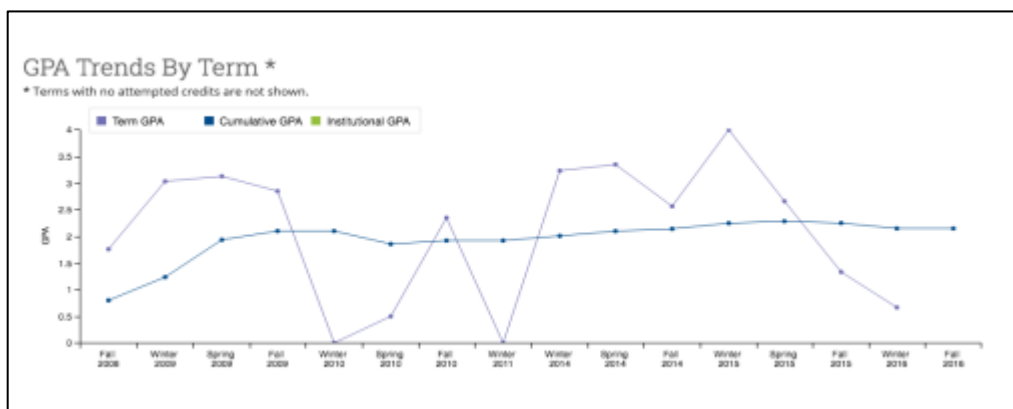
Success Markers

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.		
Completed Missing Upcoming		
5 missed markers		
Notification	Outcome	
1. BIOL1401 Recommended grade: B- (1 course) Complete between 30 and 60 credits	Needs attention 1 Attempt	
2. BIOL3121 Recommended grade: C (1 course) Complete between 60 and 90 credits	Needs attention 1 Attempt	
3. CHEM1101 Recommended grade: B- (1 course) Complete between 60 and 90 credits	Needs attention 1 Attempt	
4. CHEM1102 Recommended grade: B- (1 course) Complete between 60 and 90 credits	Needs attention 1 Attempt	
5. CHEM1103 Recommended grade: B- (1 course) Complete between 60 and 90 credits	Needs attention 1 Attempt	

GPA Trends by Term

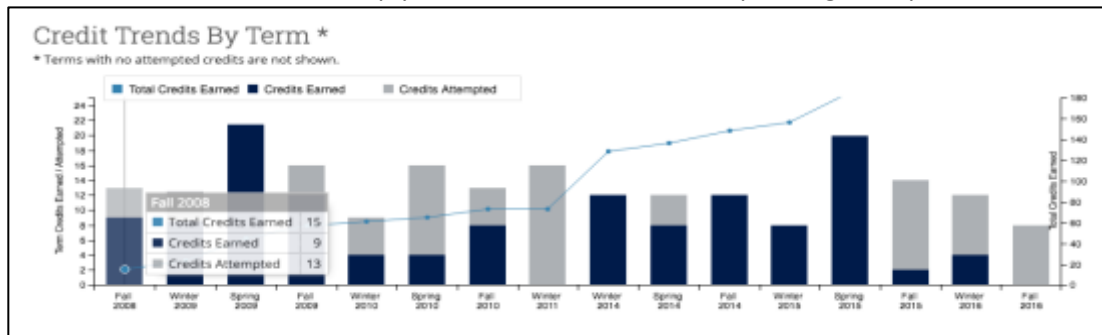
You can view a student's GPA trend by term or their cumulative GPA. If you hover over any data point, you will be provided with more information regarding a student's term GPA and cumulative GPA for each term.



Student Profile

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	3.729	1.836	2.813	21.50	21.50	45.00
Fall 2009	2.86	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	0.0	1.827	2.346	16.00	4.00	65.00
Fall 2010	2.36	1.822	2.346	13.00	8.00	73.00
Winter 2011	0.0	1.822	2.346	16.00	0.00	73.00
Spring 2011	3.233	2.809	3.527	12.00	12.00	128.50
Fall 2011	3.36	2.899	3.625	12.00	8.00	136.50
Winter 2012	3.586	2.142	2.816	12.00	12.00	148.50
Spring 2012	4.0	2.348	2.743	8.00	8.00	156.50
Fall 2012	3.66	2.284	2.728	20.00	20.00	185.50
Winter 2013	1.333	2.251	2.853	14.00	3.00	187.50
Spring 2013	0.886	2.149	2.463	12.00	4.00	195.50
Fall 2013	2.149	2.463	2.463	8.00	0	195.50

Reports/Notes

Reports/Notes tab contains information on Notes, Progress Reports, Advisor Reports, and keeps track of the 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 view an Advisor report or Note, simply click "view" next to the note or report. Notes also contains any historical note of a student. 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.

NOTE ABOUT

Body

Student's remaining GE and non-major requirements include: 1 unit of performing arts and activities (taking KIN 1643 in Spring 2016). Student must reach 186 units (66 of which must be Upper Division) to graduate. Total Units as follows: 185 Total units completed 17 Units in progress 50 Total upper division units completed 16 upper division units in progress Student still needs to fulfill University Writing Skills Requirement (JWSR; Test or Classified) - currently enrolled in ENGL 3003
http://www20.csueastbay.edu/academic/collage-and-departments/upperdivision/index.html referred to academic department for major advising. Student has applied for Spring 2016 graduation.

Author

Advisor

Student

Advisor Biological Science BS&CLBS

Created On

04/04/2016 12:08 AM

Student Profile

Class Info

The class info tab provides insight into not only the courses a student is taking in the current term, but also provides you an unofficial transcript with important historical academic information, including courses transferred to CSUEB, pre-college exams and scores, and progress on the University Writing Skills Requirement (UWSR).

Classes this Term

You have the ability to 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.

Classes This Term			
Actions +			
<input type="checkbox"/>	CLASS NAME	PROFESSOR	DAYS/TIMES
<input type="checkbox"/>	GS-8801-02 Black Literature I	Nicholas Baham	TR 10:00a-11:50a Melkayeha Hall 3086
<input type="checkbox"/>	GS-1011-72 General Studies Activities I		
<input type="checkbox"/>	GS-3011-11 GS For Transfers	Angelia Huse	W 10:00a-11:50a Melkayeha Hall 4019
<input type="checkbox"/>	STAT-3001-01 Statistical Methods in Biology	Clyde Sughaza	TR 12:00p-1:50p Science Building N207

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

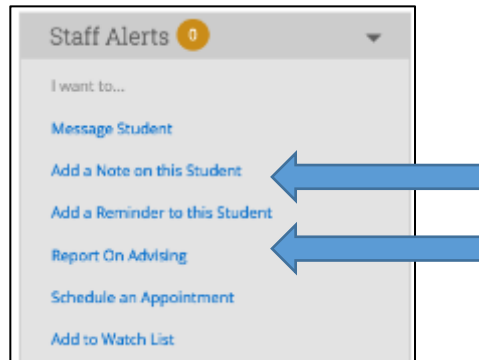
Term Details

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. You can also view if a student has completed the University Writing Skill Requirement.

Fall 2016 +			
<input type="checkbox"/>	WASH 110 LEC	Western and World Relig	B
<input type="checkbox"/>	POSC 3701 LEC	American Political Thought	B
Term at a Glance:			
		Credits	0
		Credit Comp %	0.00
		Term GPA	3.00
		Cum GPA	3.00
		Academic Standing	Good Standing
Winter 2016 +			
<input type="checkbox"/>	WASH 110 LEC	Western and World Relig	B
<input type="checkbox"/>	POSC 3701 LEC	American Political Thought	B
<input type="checkbox"/>	WASH 110 LEC	Western and World Relig	B
<input type="checkbox"/>	POSC 3701 LEC	American Political Thought	B
Term at a Glance:			
		Credits	4
		Credit Comp %	100%
		Term GPA	3.00
		Cum GPA	3.00
		Academic Standing	Good Standing
Fall 2015 +			
<input type="checkbox"/>	WASH 110 LEC	Western and World Relig	B
<input type="checkbox"/>	POSC 3701 LEC	American Political Thought	B
<input type="checkbox"/>	WASH 110 LEC	Western and World Relig	B
<input type="checkbox"/>	POSC 3701 LEC	American Political Thought	B
Term at a Glance:			
		Credits	3
		Credit Comp %	100%
		Term GPA	3.00
		Cum GPA	3.00
		Academic Standing	Good Standing
Spring 2015 +			
<input type="checkbox"/>	WASH 110 LEC	Western and World Relig	B
<input type="checkbox"/>	POSC 3701 LEC	American Political Thought	B
<input type="checkbox"/>	WASH 110 LEC	Western and World Relig	B
<input type="checkbox"/>	POSC 3701 LEC	American Political Thought	B
Term at a Glance:			
		Credits	30
		Credit Comp %	100%
		Term GPA	3.00
		Cum GPA	3.00
		Academic Standing	Good Standing

Advisor Reports

Advising Summary Reports/Advising Notes give you the ability to record accurate notes regarding an advising session. While in a student's profile, you have the ability to create either an Advising Summary Report 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

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, so the more specific you are, the better. Within the Advising Report, you have the ability to 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.

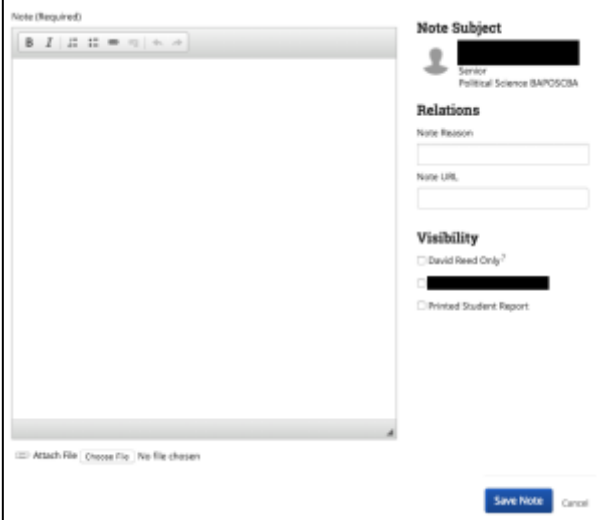
A screenshot of the 'ADVISOR REPORT FOR' form. The form is divided into several sections. The 'Appointment Details' section on the left includes fields for 'Reason' (with a dropdown menu showing 'Academic Advising'), 'Meeting Type' (with a dropdown menu showing 'Select Meeting Type'), 'Course' (with a dropdown menu), 'Date of visit' (with a date picker showing '10/24/2016'), and 'Location' (with a dropdown menu). Below this is the 'Attendees' section, which lists two users: 'David Reed' (Administration, Advisor, Student, Super User) and 'Senior' (Political Science BAPOSGBA). Both are marked as 'Attended' with checkboxes. Each has 'Arrived' and 'Departed' time fields. To the right of the attendees is the 'Attachments' section with a button to 'Attach File' and a message 'Choose File No file chosen'. At the bottom is the 'Suggested Followup' section with a note 'This will be saved on the report as a suggestion. No appointment will be created.' and fields for 'Date' and 'Time'. A 'Save this Report' button is located at the bottom right of the form.

Advisor Reports

Advising Notes

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 happen to run into the student on campus, and have a conversation that warrants a record. You must always add a *Note Reason* to an Advising Note for the note to be properly recorded.

***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



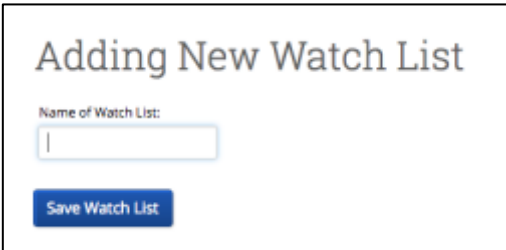
Watch Lists allow advisors to create a list of specific students of concern to monitor more closely on a regular basis. Watch Lists can be created directly from search results in The Bay Advisor, or by uploading an Excel Comma Separated Values (CSV) file into The Bay Advisor.

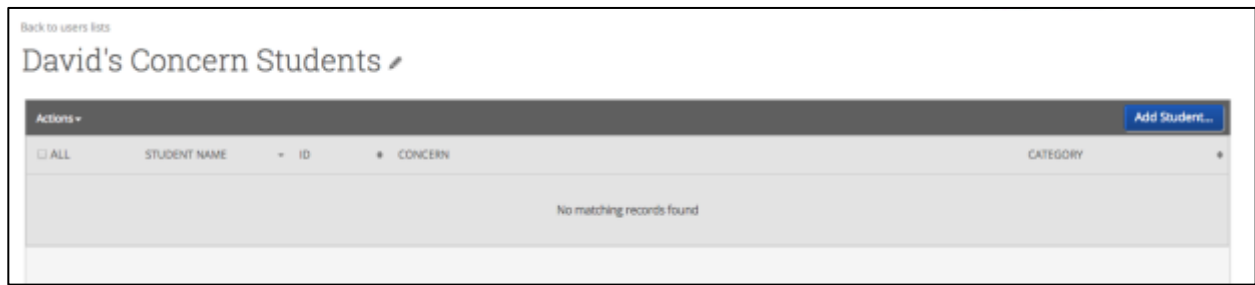
Creating a Watch List from The Bay Advisor

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



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





- 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.

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

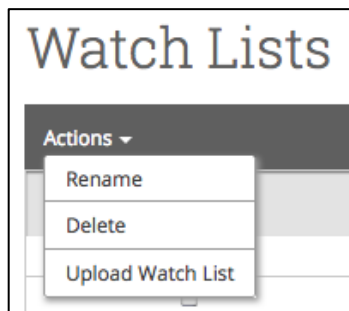
- From a search, select the student(s), go to Actions and press “Watch”.
- From a student’s profile, under the Staff Alerts box, select “Add to Watch List” and designate the specific list.

Uploading a Watch List to Bay Advisor

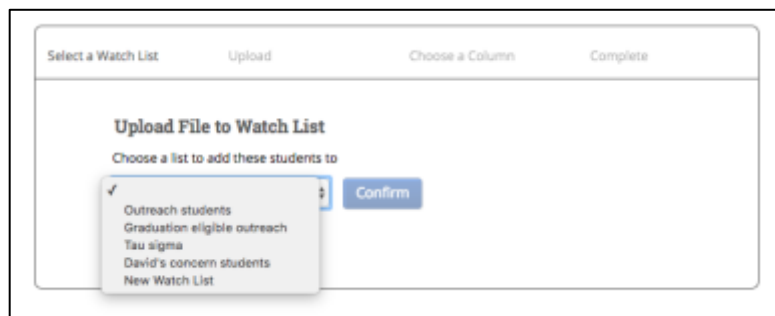
If you currently have information in an excel format and would like to monitor this group of students in The Bay Advisor, you can upload this information, with NetIDs, into a Watch List to the Bay Advisor.

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

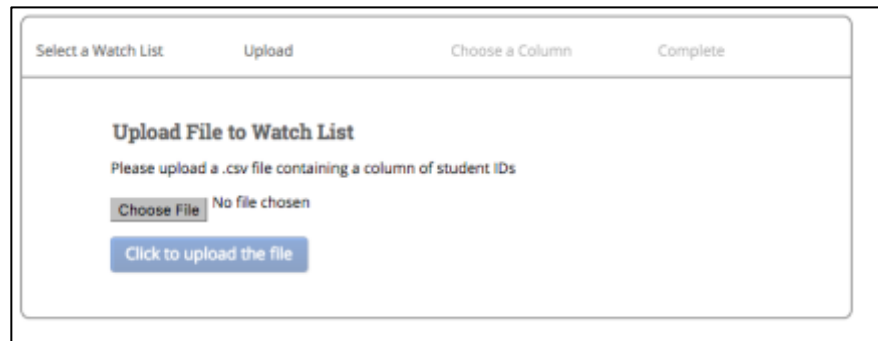
- To upload a Watch List, select Actions – Upload Watch List.



- Choose a List to add these students to:



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



The screenshot shows a web interface for uploading a CSV file. At the top, there are four tabs: 'Select a Watch List', 'Upload', 'Choose a Column', and 'Complete'. The 'Upload' tab is active. Below the tabs, the heading 'Upload File to Watch List' is displayed. The instructions state: 'Please upload a .csv file containing a column of student IDs'. There is a 'Choose File' button next to the text 'No file chosen'. Below this is a blue button labeled 'Click to upload the file'.

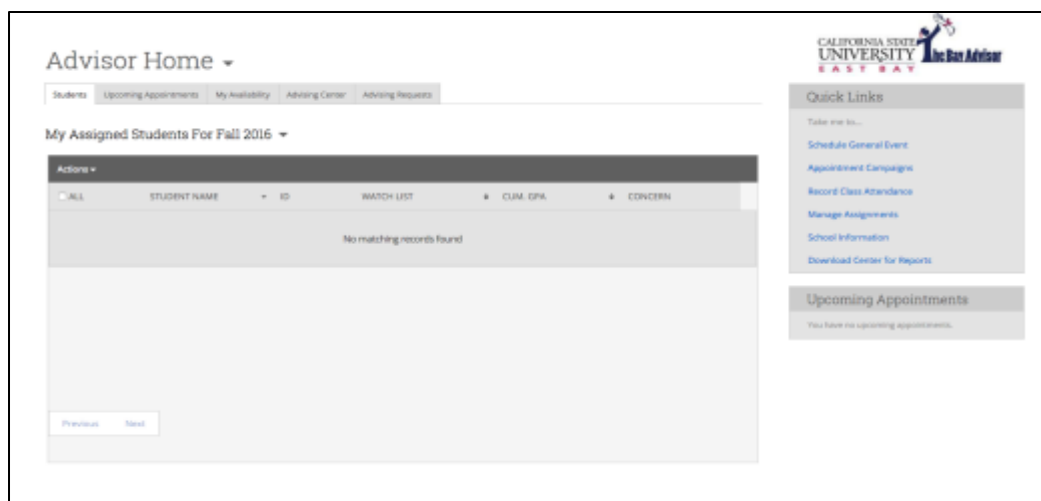
4. If your CSV file has more than one column of data, e.g, first name or last name, select the NetID as the column to import for Student ID.
5. Press Save – You have now uploaded a Watch List from a CSV file.

***Pro-Tip** – Watch List 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 be taken to your Advisor Home. Within this home screen you can view several areas that are applicable to your work as an advisor, including an overview of your upcoming appointments, set-up your availability within the appointment system, and manage waitlists of student appointments.



While CSUEB does not formally assign students to advisors, you can easily load a list of students to follow-up with. Once a search/list 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 allows advisor quick access to features such as messages, advising queues, news and announcements, minimized screens, quick searches, and various resources from the Education Advisory Board.



Conversations

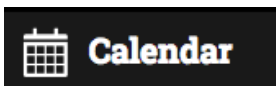


Conversations keeps a record of all messages sent either by you or to you within The Bay Advisor platform. This feature is particularly useful when keeping track of appointment notifications. This feature does not take the place of your official CSU East Bay email. However, this feature can enhance your 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.

A screenshot of the 'All Messages' interface. It features a header with 'All Messages' and a dropdown arrow. Below the header is a table with columns for 'Actions', 'Message Content', and 'Timestamp'. The table lists several messages, including appointment removals and notifications for adding a minor or changing a major option. A 'View Unread Only' button and a 'Search by Users' search bar are also visible.

Actions	Message Content	Timestamp
<input type="checkbox"/>	Reed, David [Appointment Removed] Academic Advising @ 10/25/2016 3:00p-3:30p	10/24/2016 01:41 PM
<input type="checkbox"/>	Reed, David [Appointment Removed] Academic Advising @ 10/25/2016 3:00p-3:30p	10/24/2016 01:41 PM
<input type="checkbox"/>	Reed, David [Appointment Notification] Add a Minor @ Oct 21 2016 4:00p-4:30p	10/21/2016 04:00 PM
<input type="checkbox"/>	Reed, David [Appointment Notification] Add a Minor @ Oct 21 2016 4:00p-4:30p	10/21/2016 04:00 PM
<input type="checkbox"/>	Xiong, Michelle [Appointment Removed] Add or Change Major/Option @ 10/26/2016 2:30p-3:00p	10/20/2016 01:16 PM
<input type="checkbox"/>	Thind, Mandeep [Appointment Removed] Add a Minor @ 10/21/2016 12:00p-12:30p	10/20/2016 01:16 PM
<input type="checkbox"/>	Xiong, Michelle [Appointment Notification] Add or Change Major/Option @ Oct 26 2016 2:30p-3:00p	10/20/2016 11:26 AM

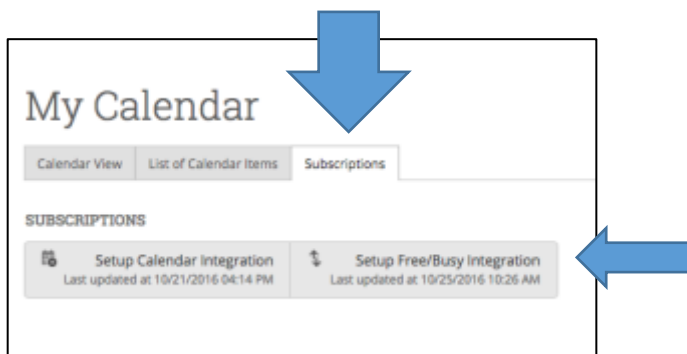
Calendar



Your Bay Advisor calendar is a great place to view all your appointments and other events in one place. You can sync your Bay Advisor calendar with your official CSU East Bay 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 Subscriptions tab. From there, select “Setup Free/Busy Integration”



Select connect with Google or Outlook. 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 calendars is highly recommended, especially for maintaining accurate advising appointment availability. Information shared between all synched calendars to give you the ability to see all information in one place. Syncing may take up to 30 minutes during initial set up.

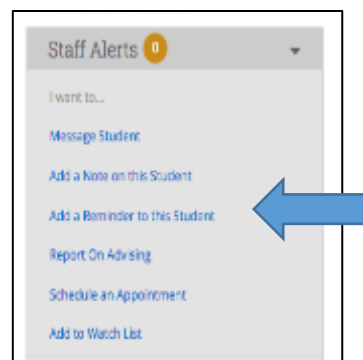
***Pro-Tip** – It is recommended to sync your Google calendar with your Bay Advisor calendar.

Reminders

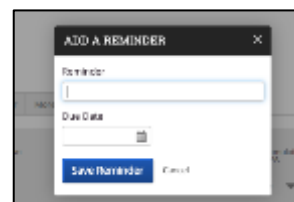


Reminders allow advisors to create a reminder for themselves regarding specific follow-up or tasks following an advising appointment or student interaction. To create a reminder for specific student, in the Student Overview, click “Add a Reminder to this Student” link.

You will then have the ability to 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.



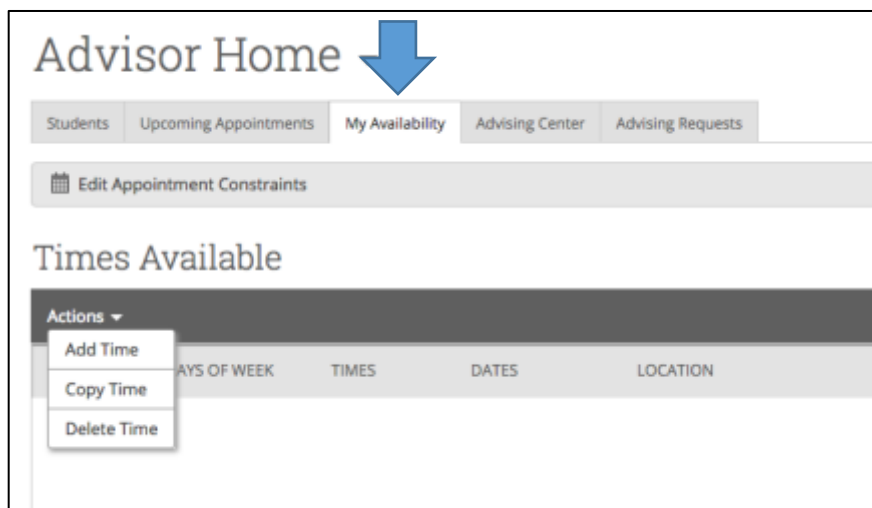
Appointment Management

THE FOLLOWING INFORMATION IS FOR STUDENT SERVICE CENTERS ONLY

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.

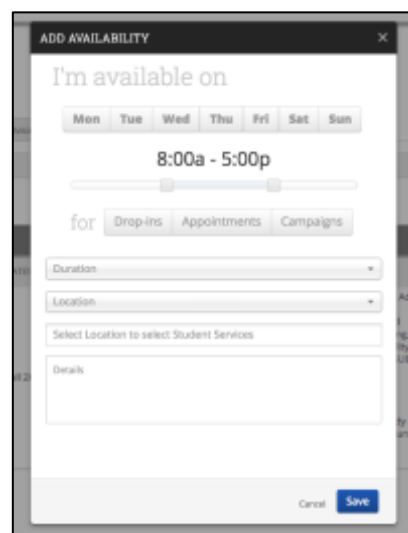
My Availability

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



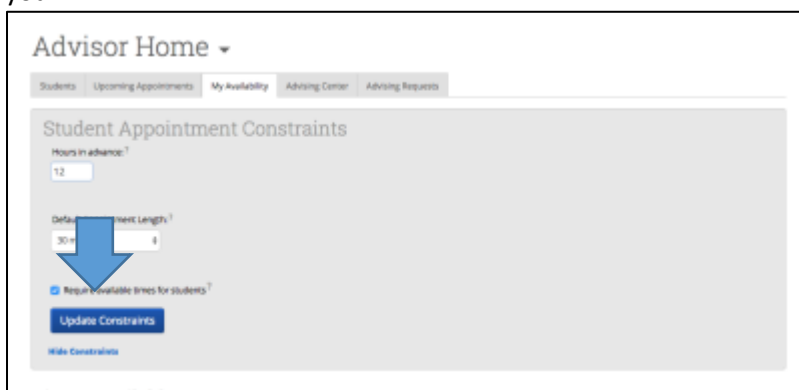
To set up an availability window, click “Actions” and then “Add Time” which will bring you to a call out box to create your availability.

1. Select the days you plan to be available, then adjust the time available for these days.
2. Select your type of Availability – “Drop-ins” or “Appointments”.
3. Select the duration for this type of availability – “Current Term, Forever, or a Select Range of Dates”. Be sure to select your location. Finally, select which services you will be available for during this availability.
4. Once satisfied, select “Save” to save your new availability.



Edit Appointment Constraints

Appointment constraints allow you to set-up appointment structures to determine the length of your available appointments, as well as the minimum number of hours in advance a student can schedule an appointment with you.



Advisor Home ▾

Students Upcoming Appointments My Availability Advising Center Advising Requests

Student Appointment Constraints

Hours in Advance:

Default Appointment Length: minutes

☒ Require Available Times for Students?

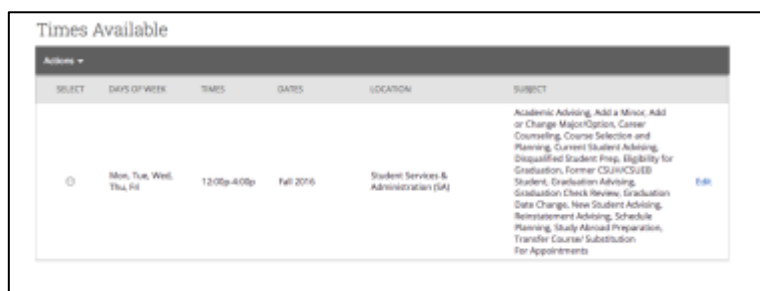
[Update Constraints](#)

[View Constraints](#)

To give your appointments constraints, select “Edit Appointment Constraints”. Make sure “require available times for students” is selected. This prohibits students from scheduling an appointment with you when they have a scheduled class. Once satisfied with your selection, press “Update Constraints.”

Times Available

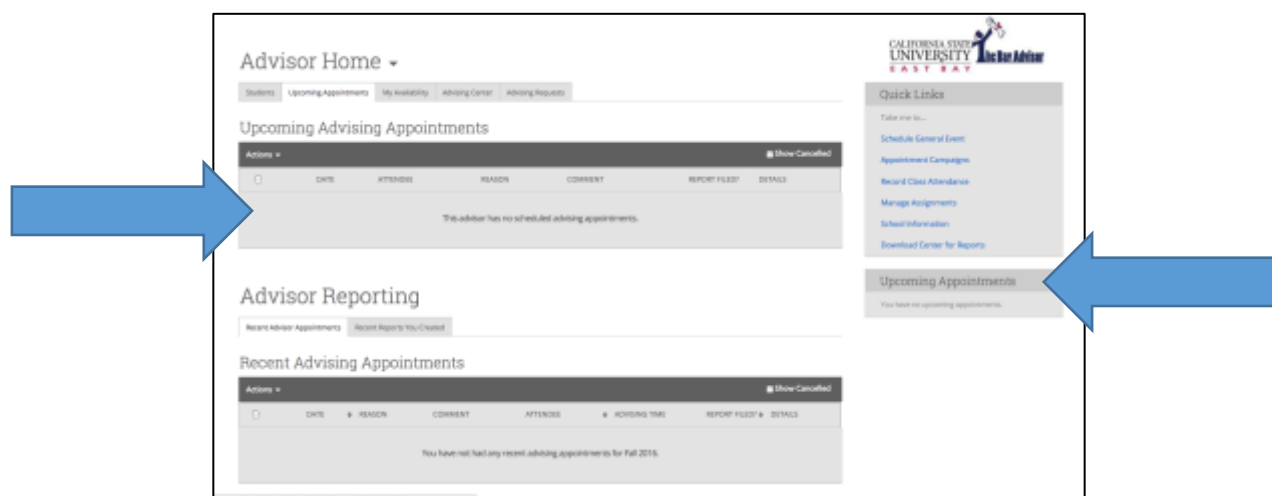
When appointment constraints and availability is complete, you will be able to view your appointment availability. This availability may need to be updated every term or as needed. To edit your availability, select “edit” on the far right.



Times Available					
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, Center Counseling, Course Selection and Planning, Current Student Advising, Disqualified Student Prep, Eligibility for Graduation, Former CSU/CSUEB Student, Graduation Advising, Graduation Check Review, Graduation Data Change, New Student Advising, Reenrollment Advising, Schedule Planning, Study Abroad Preparation, Transfer Course Substitution For Appointments

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.



Advisor Home ▾

Students Upcoming Appointments My Availability Advising Center Advising Requests

Upcoming Advising Appointments

[Show Cancelled](#)

	DATE	ATTENDANCE	REASON	COMMENT	REPORT FILED?	DETAILS
This advisor has no scheduled advising appointments.						

Advisor Reporting

[Recent Advising Appointments](#) [Recent Reports You Created](#)

Recent Advising Appointments

[Show Cancelled](#)

	DATE	REASON	COMMENT	ATTENDANCE	ADVISING TIME	REPORT FILED?	DETAILS
You have not had any recent advising appointments for Fall 2016.							

Quick Links

- Take me to...
- [Schedule General Event](#)
- [Appointment Campaigns](#)
- [Record Class Attendance](#)
- [Manage Assignments](#)
- [School Information](#)
- [Download Center for Reports](#)

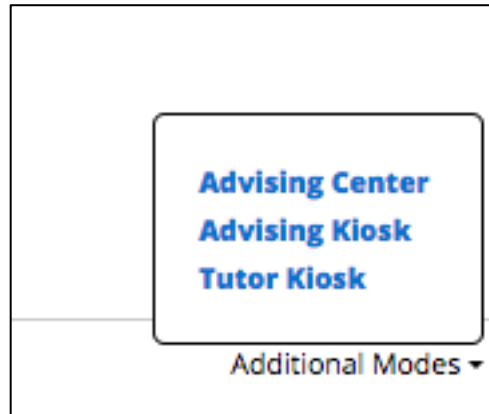
Upcoming Appointments

You have no upcoming appointments.

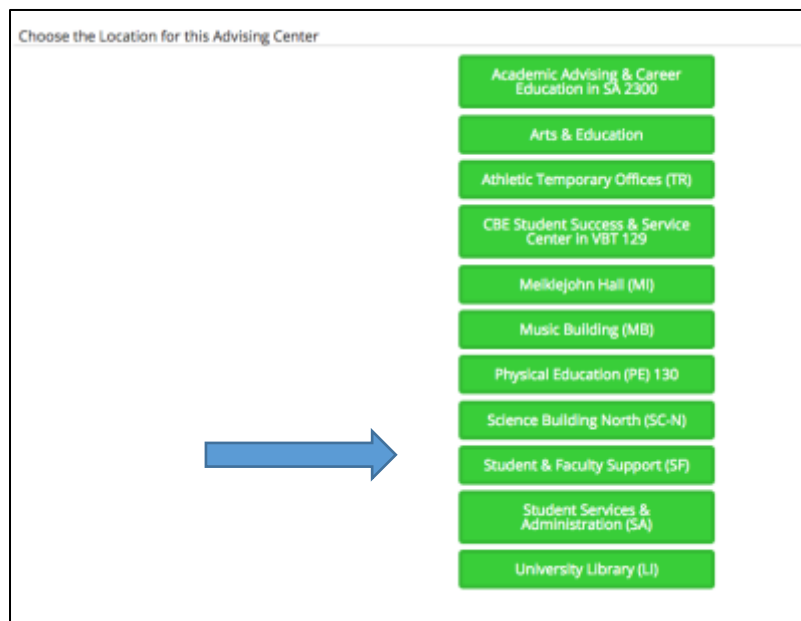
Front Desk Appointment Management

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 the office. To open and manage the Advising Center, navigate to “Additional Modes” in the bottom right hand corner of your screen. Select “Advising Center”.



Select the correct location of your center/office.



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

Availability For Nov 17 2016								
TIME	CHRISTINA BLUCK	TONI BROWN	JOHN CAHILL	GEORGE HANNA	WAFIAA HANNA	TERRY PEPPIN	DAVID REED	JOY VICKERS
7:00a				■ DROP-IN				
7:30a				■ DROP-IN				
8:00a				■ DROP-IN			■	
8:30a				■ DROP-IN			■	
9:00a	■	■	■	■ DROP-IN	■		■	■
9:30a	■	■	■	■ DROP-IN	■		■	■
10:00a	■	■	■	■ DROP-IN	■		■	■
10:30a	■	■	■	■ DROP-IN	■		■	■
11:00a	■	■	■	■ DROP-IN	■		■	■
11:30a	■	■	■	■ DROP-IN	■		■	
12:00p				■ DROP-IN			■	
12:30p				■ DROP-IN			■	

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 ADVISOR APPOINTMENT

Student: [REDACTED]

Advisor: David Reed

Where: Student Services & Administration (SA)

When: Nov 17 2016 11:30 AM to 12:00 PM

Reason(s) for Appointment

General Advising
Add or Change Major/Option
Career Counseling
Course Selection and Planning

Comments

☐ Student has checked in for the appointment
☒ Send E-mail Reminder
☐ Send SMS Reminder

Save Appointment

5. Select the reason(s) for the appointment and include any comments (ex. Remember Bay Card, print D.A.R., etc)
6. Save appointment

The Bay Advisor will send an email confirmation to the student once an appointment has been created, and a reminder email will be sent the morning of the appointment.

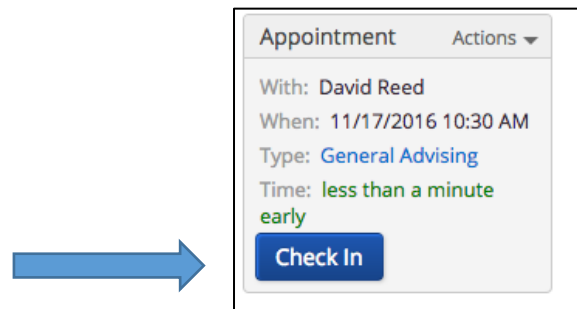
Front Desk Appointment Management

Checking in a Student for an Appointment

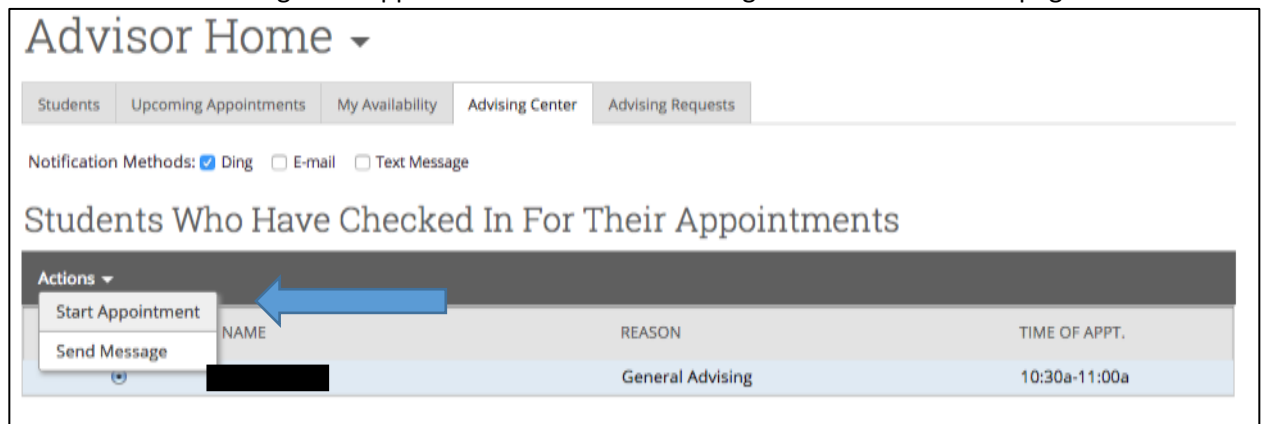
When a student arrives for a scheduled appointment, as a front desk user/office manager, you can check the student in to notify the advisor their scheduled meeting has arrived.

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.



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



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

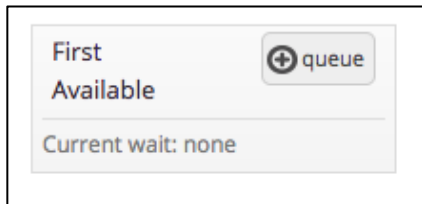
Drop –In Management and Check-Ins

Drop-in hours are great 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



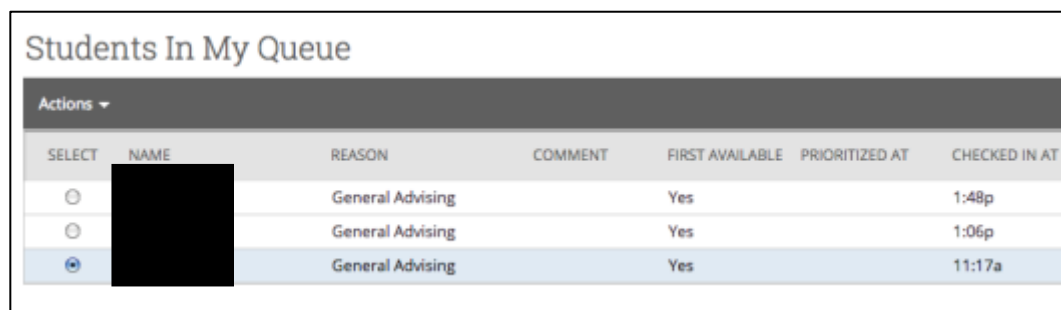
First Available

+ queue

Current wait: none

***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.



SELECT	NAME	REASON	COMMENT	FIRST AVAILABLE	PRIORITIZED AT	CHECKED IN AT
		General Advising		Yes		1:48p
		General Advising		Yes		1:06p
		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 or added any attachments, do not forget to save the report.

Frequently Asked Questions and Additional Resources

FAQs

Q: Did this enhancement to the Bay Advisor get rid of any features?

A: No, all features from the old version of The Bay Advisor are still here. The layout and design of The Bay Advisor has changed significantly, but all search and advising functions are still the same. Please take your time exploring The Bay Advisor to get used to the new layout.

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 I send my notes to students?

A: At this point in our launch of the enhanced Bay Advisor notes cannot be shared from the platform to students. To share a note with a student, please log on to People Soft to send the note as an email. Once all features of the student portal have been updated, students will be able to log on to view notes shared with them.

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. If you know a student is active and is not appearing in the platform, please contact David Reed, david.reed@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 of a student's record, please contact David Reed, david.reed@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 David Reed, david.reed@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 David Reed. As a Bay Advisor user, you will receive information throughout the academic year of any updates or further enhancements to The Bay Advisor.

Undergraduate Studies – undergraduates@csueastbay.edu

Accessibility Services – as@csueastbay.edu

Semester Conversion – semester.conversion@csueastbay.edu