



## Workflow Jargon Cheat Sheet

### SSC—Campus Specialists

**Advisor or Tutor Request** – If a student wants to schedule an advising or tutoring appointment but cannot find a convenient time, then they can submit an Advisor Request or a Tutor Request. Advising and tutoring requests contain the student’s availability and preferred location to receive services. Requests appear in the advising and tutoring home pages, where advisors/tutors can match the requests by scheduling an appointment with the student.

**Advising Report or Tutor Report** – Advising reports and tutor reports enable advisors and tutors, respectively, to document their appointments with students. These forms catalog important information about the appointment (e.g., attendance, time and location, summary commentary) for reporting and to display on the “Reports/Notes” tab of a student’s SSC—Campus profile.

**Note** – Notes are used to attach commentary to a student’s profile that is not associated with a specific advising or tutoring appointment. In this way, they are unlike Advising Reports and Tutor Reports, which are directly associated with an appointment. If you want to indicate that an appointment took place, you should file an ad hoc Advising Report by clicking “Report On Advising” on a student’s profile page. This feature retroactively creates an appointment. Notes are currently the only method of attaching a file to a student’s profile. Notes display on the “Reports/Notes” tab of a student’s profile in a section labelled “Notes About Student.”

**Progress Report** – Progress reports allow faculty to submit in-semester feedback (e.g., current grade, absences) on the progress of students in their courses. By marking a student as at-risk to fail a course in a progress report, faculty can alert student support staff to students who need assistance or may be at risk of leaving the institution. Progress reports are the “early alert” functionality of the SSC—Campus platform. Faculty members can submit progress reports at any time, or student support staff can request progress reports on specific students through the Progress Report Campaign feature. After submission, progress reports and any affiliated alerts or cases will display on the “Reports/Notes” tab of a student’s profile.

**Report** – In the “Reporting” section of the platform, users can view summary reports on the data located in and captured through the SSC—Campus platform. This section contains reports that summarize data on: progress reports, alerts and cases, absences & enrollment, assignments, study hall, student information, student services, tutoring, and advising.

**Reason (& Student Service)** – Reasons enable your institution to provide a custom, standard list of explanations that categorize actions and documents in the platform. If defined by your institution, reasons can be available to categorize notes, alerts, appointments, and appointment cancellations. Appointment reasons are also called “student services” in certain parts of the platform (e.g., when scheduling an appointment, when filing a tutor report).



**Location** – During platform configuration, system administrators define the locations where students receive services that will be managed through the SSC—Campus platform (e.g., Career Center, Academic Support Center, Biological Sciences Tutoring Center, Math Lab). During configuration, administrators also define which student services are offered at each location. When a user schedules an appointment they must choose the student service and location for that appointment.

**Case** – A case is created when a user issues an alert that requires another user to follow up with a student in order to resolve their issue. For example, when a faculty member submits a progress report and marks a student as “at-risk,” a case will typically be opened for an advisor to work with that student. Not all alerts generate cases. The institution can configure which alert reasons automatically generate cases, and to whom the cases are directed. Cases for an individual student display on the “Reports/Notes” tab of the student’s profile. All cases (i.e., for any advisor and for any student) display on the Cases homepage, accessed via the left-hand navigation bar. Visibility on the Cases homepage is restricted by user role and permissions.

**Category** – Categories are system-wide identifiers of students. They are generated and managed by central platform administrators through either data import or mass edit. Users without administrator privileges cannot create a category or assign students to a category. A student can belong to multiple categories. The categories to which a student belongs display at the bottom of the student’s Overview page. Users can search for students assigned to a particular category in Advanced Search.

**Tag** – Tags are like categories, but they allow individual users to group similar students together by a common affiliation not otherwise captured in the data (e.g., choir member, interest in graduate school). All users can utilize tags to search for, report on, or communicate with these groups of students. Only some users (based on institutional configuration) can create and edit tags. A student can be assigned multiple tags, and the tags that have been applied to a student display at the bottom of the student’s Overview page.

**Reminder** – There are multiple reminders in the platform. Students have the option to receive emails and text messages that remind them of an upcoming appointment. Advisors can also add a reminder to a student account to remind themselves to follow up or complete a certain task.