Caseload Management Features

Date: 12/3/20

OVERVIEW

Advisors will have drop-down options to view their Student Lists and/or assigned student caseload list.

Advisor View

Advisor can select students from caseload list, such as:

- Immediately create an appointment campaign
- Export students into excel
- Send a message
Advanced Search

Advisors can conduct an “Advanced Search” of their caseload to focus on a specific student population.

Combining Caseload filter and Orientation code

- Advisor can locate students in their caseload that have signed-up for a specific Orientation date. (This is applicable when orientation codes are in use for a specific Term)
- Advisor can then create a campaign for their incoming students to conduct a New Student Registration/Advising Appointment
Student View

Advising Appointment Campaign

When a student is invited as part of an Advising Appointment Campaign, their Student Home page will have a yellow banner prompting them to click “Schedule this appointment”.

- The appointment deadline in the yellow banner is generated from your Campaign date range.
- Your student will only see advising appointment slots within your campaign dates/times. These correspond with the Campaign open availabilities which are setup up by individual Advisors.

For students with more than one assigned advisor in EAB, such as EOP and Honors students.

- The banner will display multiple advisor requests when the student is part of multiple active campaigns
**Advisor Note**

When the campaign organizer (i.e. Advisor/Center Manager) creates a campaign, the following box must be left unchecked, in order to restrict student visibility to only include campaign appointment availability.

**Note:** If the box is checked, the student will be able to see all advisor availability.

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**Student Selects appointment day & time:**

If appointment times are filled for a specific date, it will prompt the student to select another date/time in your campaign.
Student finds and selects an available appointment time/date:

Student Confirms Scheduled Appointment

- Student will be sent appointment reminders via email & text message.
- Student will see your zoom link in the appointment details and reminders (applicable when zoom links are in use).

Congratulations Andrea! Your appointment has been scheduled.

Appointment Details

Who: Andrea Villegas with Andrea Villegas
Why: General Advising
When: Wednesday, June 17
10:00am - 11:30am PT
Where: College of Health and Human Services Advising Center
Additional Details:
Please click the zoom link for your group online New Student Registration Lab appointment.
https://calstatela.zoom.us/j/3740499716
Reminders: Email at aville10@calstatela.edu
Text at 562-457-90745