

Student Success Link Success Navigator Training



JUNE 2020



SAN MATEO COUNTY
COMMUNITY
COLLEGE DISTRICT

Meet the CRM Team!



Kristen Murray
Senior Programmer I, CRM



Steven Yee
System Administrator, CRM



Sandy Allen
Director, CRM

Introductions

- ▶ Name
- ▶ Role
- ▶ Favorite Cookie



Agenda

- ▶ CRM Background
- ▶ PII & FERPA
- ▶ Student Success Link Navigation
- ▶ Record Types
- ▶ Student Success Team
- ▶ **5-10 Minute Break**
- ▶ Success Plan Enrollment
- ▶ Appointments
- ▶ Outlook Integration
- ▶ Resources & Next Steps

Housekeeping

- ▶ Please go on mute, feel free to turn mute off if you have any questions
- ▶ Training will be recorded
- ▶ Have a copy of this slide deck and your training Activity Guide available
- ▶ Sandy will be presenting
- ▶ Check out the Zoom Chat to find the student record you will be working with you, please use this record for the entirety of our training
- ▶ Steven will be offering support via chat/break out room
- ▶ Questions: Please raise hand or chat question to the group
 - ▶ Questions that are not answered today will be added the Parking Lot
 - ▶ We will also keep track of ideas of future iterations of Salesforce

Training Format

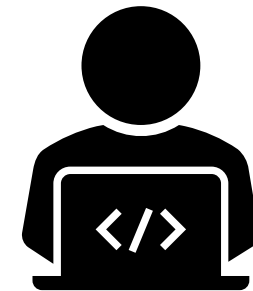
Presentation



Demo



DIY
Activity Guide

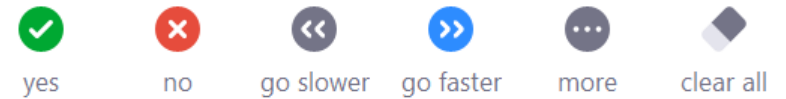


I'm Ira
Glass, stay
with us!



Zoom Warm Up!

- ▶ Go to the Zoom Participants list, and look at the icons at the bottom of the list
- ▶ Find and click the Green yes check, click it! Wait for Sandy to clear it
 - ▶ We will use this to indicate you have completed an activity.
- ▶ Find and click the Red X, click it! Wait for Sandy to clear it
 - ▶ We will use this to indicate you are having trouble with an Activity, need help, or need more explanation. Steven will take you into a breakout room to troubleshoot
- ▶ Click the more button, and click the Coffee Cup or the Thumbs Up
 - ▶ Use the coffee cup to tell us you stepped away from the meeting
 - ▶ You can the Thumbs Up to let us know you agree



Here we go!

- ▶ Things to have ready
 - ▶ Training Guide
 - ▶ Slide Deck
 - ▶ A picture to add to your Salesforce profile



CRM Background

CRM Background



10

- ▶ Constituent Relationship Management (CRM)
- ▶ Technology system used for managing relationships, i.e. prospective, current and alumni students.
- ▶ Uses student historical and ongoing data to create interventions for
 - ▶ Recruitment and Admissions
 - ▶ Retention and Completion
 - ▶ Alumni and Workforce


Overview of CRM Capabilities

- ▶ System of Engagement vs. System of Record
 - ▶ Engage (and reengage) prospects and current students
 - ▶ Communication (Email/Text/Push Notifications/Phone)
 - ▶ Alerts and Interventions, i.e. Success Plans
 - ▶ Chatbots and Knowledge Base Articles
 - ▶ Integration of systems (Canvas, Banner, Degree Works, Accudemia, etc.)

Overview of CRM work thus far....

PHASE 1: Recruitment and Marketing

- ▶ Recruitment Discovery & Creation
 - ▶ Process Maps
 - ▶ RFI Forms




Request for Information


First Name	<input type="text"/>
Last Name	<input type="text"/>
Mobile Phone	<input type="text"/>
Receive Texts?	--None--
Email	<input type="text"/>
Area of Interest	--None--

Submit

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Skyline College is READY FOR YOU. 12



At Skyline College we believe in your optimism. We are inspired by your passion. And we want you to succeed beyond your wildest dreams.

Your education is waiting for you. Our faculty have created programs for every student, at every level and every age – they'll prepare you for transfer to a four-year university or to directly enter the workforce. And we've broken down our academic programs into four **Meta Majors** to make it easy for you to get started.



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You enjoy understanding the way organizations operate – and you're ready to capitalize on what you learn. You're a self-starter who knows the value of teamwork, customer service and creativity. You like examining workflows and cash flows and you recognize the important role technology plays in all of it. You're a leader, and you're ready and willing to step up and make things happen.


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PII & FERPA



Personally Identifiable Information

- ▶ Personally identifiable information includes, but is not limited to:
 - ▶ The student's name;
 - ▶ The name of the student's parent/guardian or other family members;
 - ▶ The address of the student or student's family;
 - ▶ A personal identifier, such as the student's social security number, student number, or biometric record;
 - ▶ Other indirect identifiers, such as the student's date of birth, place of birth, and mother's maiden name;
 - ▶ Other information that, alone or in combination, is linked or linkable to a specific student that would allow a reasonable person in the school community, who does not have personal knowledge of the relevant circumstances, to identify the student with reasonable certainty;
 - ▶ Information requested by a person who the district reasonably believes knows the identity of the student to whom the student record relates.

PII Best Practices & FERPA

- ▶ You have a responsibility to protect educational records in your possession.
- ▶ Student Educational Records are confidential and may generally not be released without written consent of the student.
- ▶ As a faculty or staff member you have access to Educational Records only for legitimate use in the completion of your responsibilities as a university employee.
- ▶ Be sure to log out of the Student Success Link or close screen when you leave your computer
- ▶ Be aware of anything printed from Student Success Link sitting on printers
- ▶ Be aware of any PII data included in reports, remove PII data and use IDs when possible
- ▶ Do not send student PII data over email, send Student Success Link links instead

POP QUIZ #1!



Student Success Link Navigation



A note on Language

- ▶ You may see language in Salesforce that references “Advisor”. The application we’re using is called “Advisor Link”, so we changed it where we could, but you may still see some references to Advisor.
- ▶ Anything referencing “Advisors” is only in the internal view of Salesforce, all Students see language reflecting “Counselors”

Tool we are using

▶ **SSO: Single Sign On**

- ▶ A tool used for Single Sign On, or OneLogin
- ▶ Login to this portal with your network password to access all your apps (Student Success Link, Canvas, DegreeWorks, etc.)

▶ **Production**

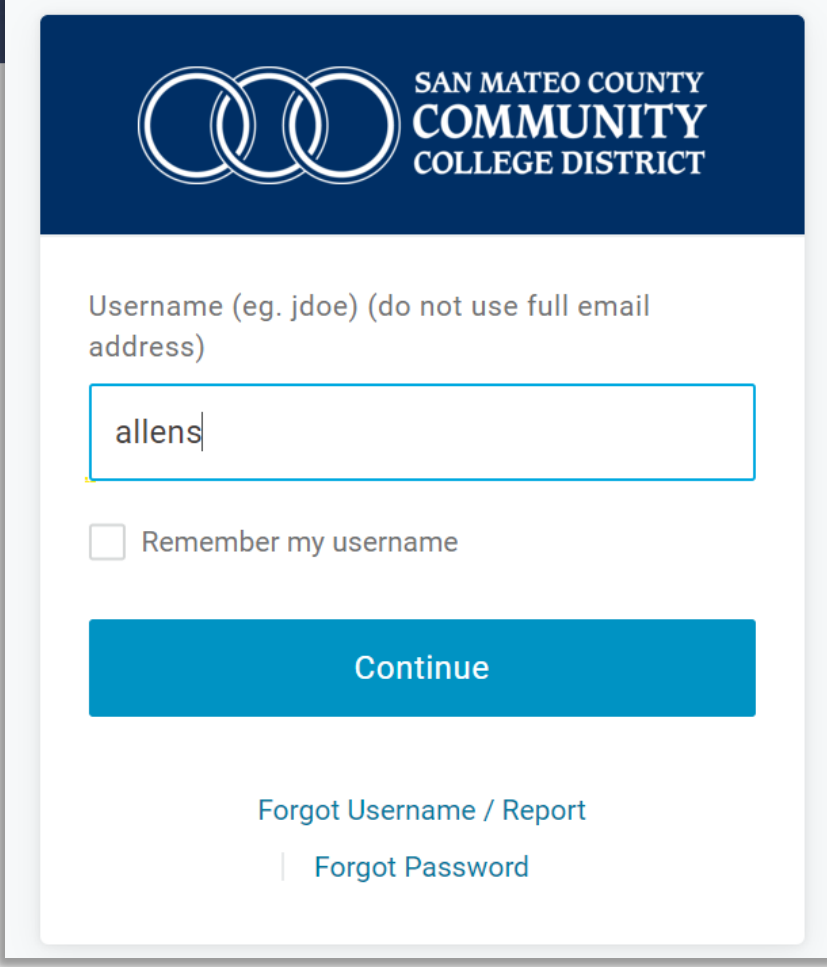
- ▶ This is the real, live version of the Student Success Link. This is real thing! Live data, real automation, real integration.

▶ **Sandbox**

- ▶ A test environment for the Student Success Link. It is configured to look real, but there is email automation. We build things here first to test before moving to production.
- ▶ Anything you do here, you will need to do again in production.

OneLogin Instructions & Demo

- ▶ You will use OneLogin, to access Salesforce Sandbox for training today, as well as the Student Success Link after June 14th
- ▶ Bookmark this link! You will use it!
 - ▶ [SMCCD.onelogin.com](https://smccd.onelogin.com)
- ▶ Login with your network username and password, the same login credentials you use to login to your computer
- ▶ If you forget your username (Active Directory Username) or Password, use instructions found here.
 - ▶ https://smccd.edu/studenttutorials/onelogin_tutorial.php



The screenshot shows the OneLogin login interface for San Mateo County Community College District. At the top, there is a dark blue header with the college's logo (three interlocking circles) and the text "SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT". Below the header, the page has a white background. A label "Username (eg. jdoe) (do not use full email address)" is positioned above a text input field. The input field contains the text "allens". Below the input field is a checkbox labeled "Remember my username". A large blue button labeled "Continue" is centered below the checkbox. At the bottom of the page, there are two links: "Forgot Username / Report" and "Forgot Password".

SAN MATEO COUNTY
COMMUNITY
COLLEGE DISTRICT

Username (eg. jdoe) (do not use full email address)

allens

☐ Remember my username

Continue

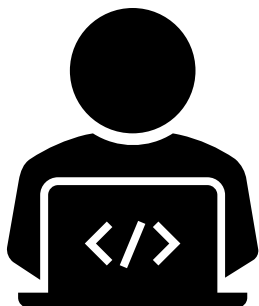
[Forgot Username / Report](#)

[Forgot Password](#)

Activity #1: Log into SSO and Salesforce Sandbox

Review your
Activity Guide for
instructions (pg 1)

Questions? Ask
Sandy and Steven!

A screenshot of the San Mateo County Community College District (SMCCD) Single Sign-On (SSO) portal. The header shows the SMCCD logo and the user's name, Sandra. A search bar is located at the top. Below the search bar, a red box highlights the 'MySMCCD: Portal' dropdown menu. The main area displays a grid of application tiles. A red box highlights the 'Salesforce Sandbox (smc...)' tile in the bottom right corner. Other visible tiles include Virtual Campus, Canvas, Dropbox, Nuventive, ITS Blog, OneSearch (Cañada, CSM, and Skyline libraries), Salesforce Communities, Student Success Link, WebSchedule, and Zoom.

SAN MATEO COUNTY
COMMUNITY
COLLEGE DISTRICT

SA Sandra

Search

Frequently Used: MySMCCD: Portal ▼

Virtual Campus

Canvas

Dropbox

Nuventive.

Improve (formerly Tracdat)

ITS Blog

OneSearch: Cañada Library

OneSearch: CSM Library

OneSearch: Skyline Library

Salesforce Communities ...

Salesforce Sandbox (smc...)

Student Success Link

WebSchedule

Zoom

Navigation: Initial Login

The screenshot displays the Salesforce initial login navigation interface. Red annotations highlight key navigation elements:

- Global Search:** A red arrow points to the search bar at the top right, labeled "Global Search".
- User Profile:** A red arrow points to the user profile icon in the top right corner, labeled "User Profile".
- Navigation List:** A red arrow points to the "Home" button in the top navigation bar, labeled "Navigation List".
- Appointment Manager:** A red arrow points to the "Appointment Manager" button in the bottom left corner, labeled "Appointment Manager".
- Additional Links:** A red arrow points to the "Additional Links" section on the right side of the dashboard, labeled "Additional Links".

The interface includes the following components:

- Top Navigation Bar:** Contains the Salesforce logo, a search bar, and a user profile icon.
- Advisor Link:** A button labeled "Advisor Link" with a dropdown menu showing "Home".
- Dashboard:** Features a "Sort by:" dropdown set to "Most Recent Activ...", a search bar "Search this f...", and a "No bookmarks? You're missing out!" message.
- Additional Links:** A section on the right containing links to "International Portal", "Cañada RFI Page", "Skyline RFI Page", "CSM RFI Page", "Event Listing (All Campuses)", "Event Listing (Cañada College)", "Event Listing (Skyline College)", and "Event Listing (College of San Mateo)".
- Today's Tasks:** A section at the bottom right showing "Nothing due today. Be a go-getter, and check back soon." with a "View All" link.

Navigation: Appointment Manager

► Appointment Manager will be the easiest way to get to your upcoming Appointments and complete your daily tasks

Click Up "Up Next", or "Today" to see upcoming Appointments

Click Appointment Manager to expand window

The screenshot shows the Salesforce Appointment Manager interface. The top navigation bar includes the Salesforce logo, a search bar, and user profile icons. The main content area is divided into several sections:

- Appointment Manager Header:** Includes tabs for "Today" and "Up Next".
- Appointment Details:** A sidebar on the right showing details for a specific appointment, including the topic, subtopic, status, and comments.
- Appointment List:** A list of upcoming appointments, with one highlighted for "Eftekhari" at 01:00 PM.
- Buttons:** "New Drop In" and "New Appointment" buttons are located in the top right of the appointment list.
- View Record:** A button at the bottom of the appointment details sidebar.
- Today's Tasks:** A section on the right side of the screen showing tasks for the current day.

Annotations with red arrows and boxes highlight the following elements:

- See upcoming appointment details:** Points to the "Today" and "Up Next" tabs.
- Schedule New Appointments on this screen:** Points to the "New Drop In" and "New Appointment" buttons.
- View Advisee Record:** Points to the "View Record" button.
- Click Up "Up Next", or "Today" to see upcoming Appointments:** Points to the "Up Next" tab.
- Click Appointment Manager to expand window:** Points to the "Appointment Manager" tab in the bottom navigation bar.

Navigation: Student Case Record

The student case record includes information on upcoming Appointments, Success Team members, Courses, Notes, and Tasks/Enrollment Steps

The screenshot displays the Salesforce interface for a student case record. The top navigation bar includes the Salesforce logo, a search bar, and user profile icons. The main header shows the 'Advisor Link' and the 'Cases' tab, with a dropdown menu for 'Reneyro Dominguez'. Below this, the 'Reneyro Dominguez' case record is shown, including a '00011335' ID. The left sidebar contains a summary of 'TASKS', 'ALERTS', and 'APPOINTMENTS' (all at 0), and 'Advisee Details' such as Name, Email, and Phone. The main content area is titled 'Case Advisee Case' and features a red-bordered navigation bar with tabs: 'Advising', 'Team', 'Success Plans', 'Courses', 'Alerts', 'Notes', 'Tasks', and 'More'. The 'Advising' tab is selected, showing sections for 'Upcoming Appointments (0)', 'Past Appointments (0)', and 'Cancelled Appointments (0)', each with a 'New Appointment' button. The right sidebar shows the 'Activity' tab with filters and a section for 'Upcoming & Overdue' activities, indicating no next steps or past activity.

Reneyro Dominguez

TASKS 0 | ALERTS 0 | APPOINTMENTS 0

Last Appointment: None
Status: New
FERPA: ☐

Advisee Details

Name
Reneyro Dominguez

Email
ren.dominguez1@gmail.com.invalid

Phone

Case Advisee Case

+ Follow Edit

Advising Team Success Plans Courses Alerts Notes Tasks More

Upcoming Appointments (0) New Appointment

Past Appointments (0)

Cancelled Appointments (0)

Activity Chatter

Filters: All time • All activities • All types

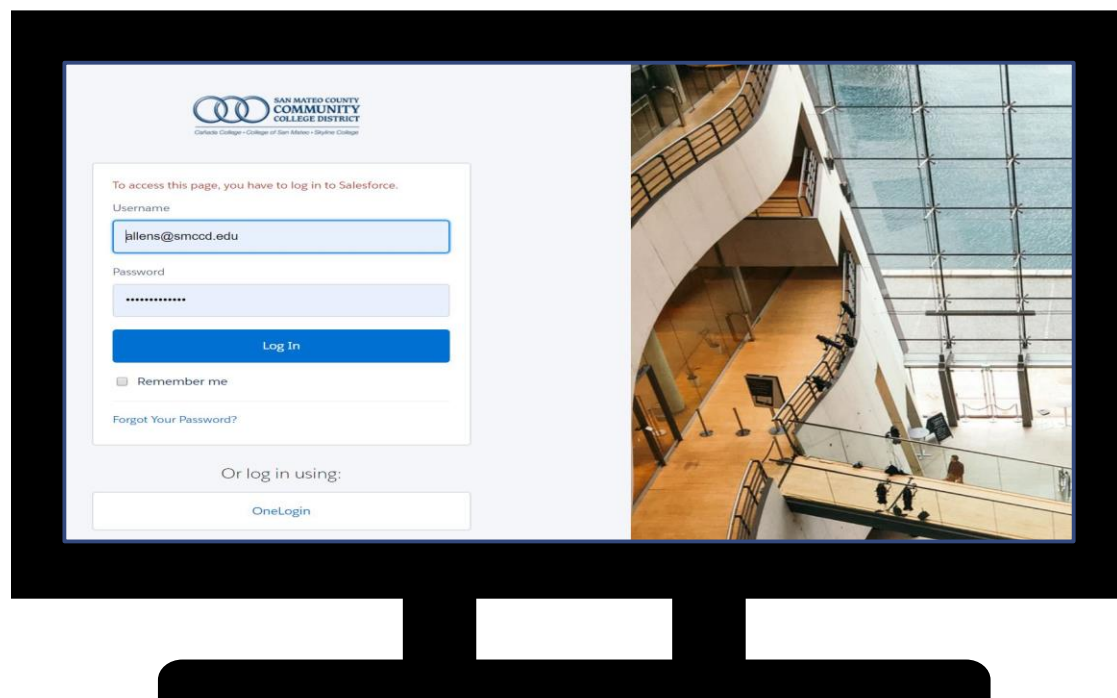
Refresh • Expand All • View All

Upcoming & Overdue

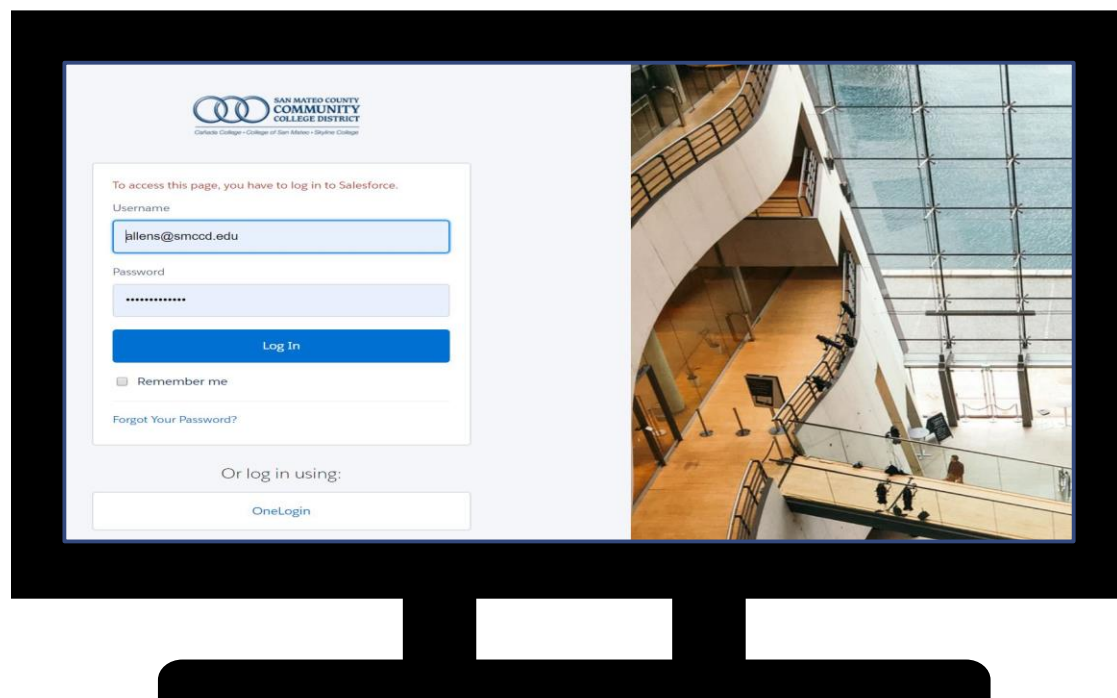
No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Demo: Navigation, Home page, Student Case Record, Appointment Manager



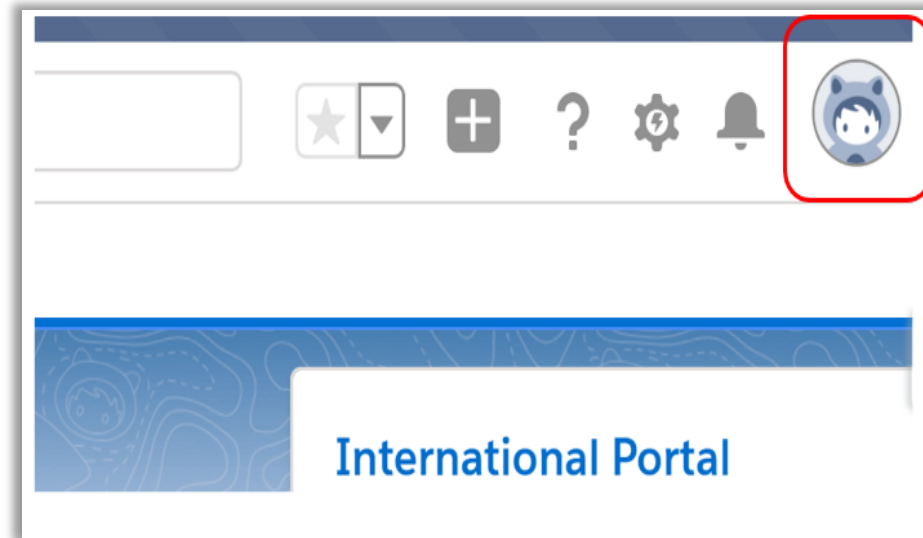
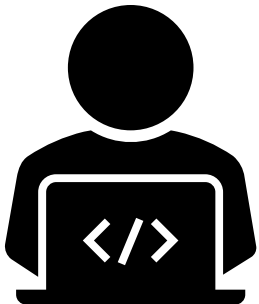
Demo: Pin "My Advisee View", Add a Picture, Update Profile Info



Activity #2: Update Profile and Pin “My Advisees” View

Review your
Activity Guide for
instructions (pg 2)

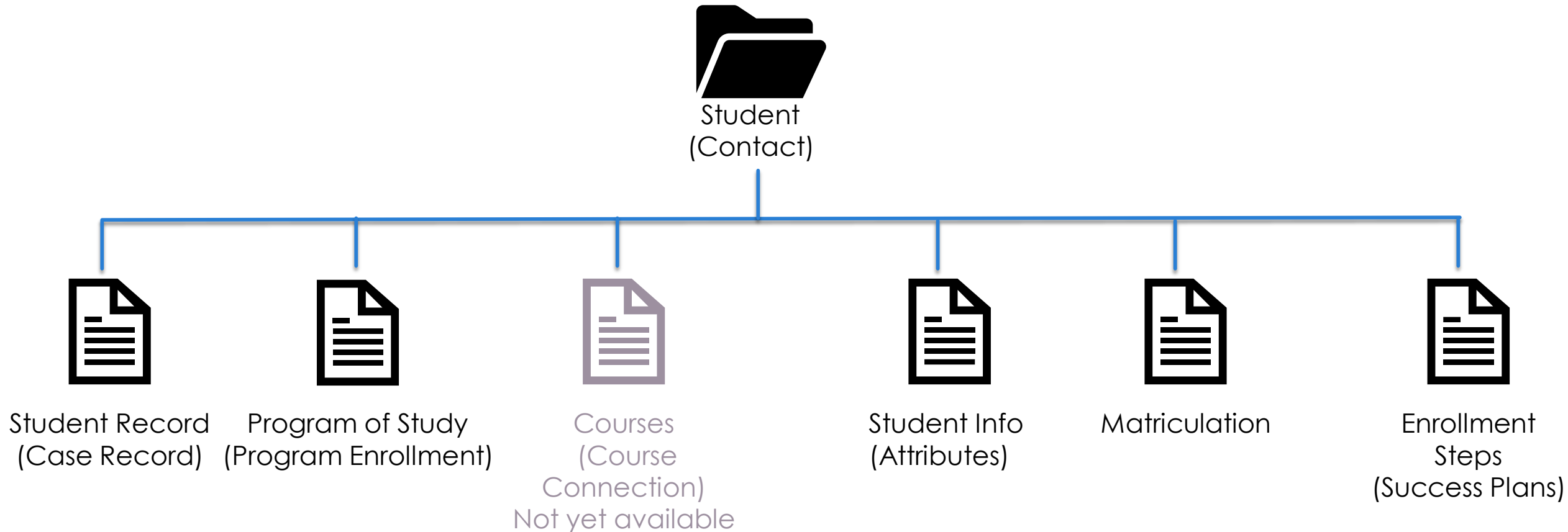
Questions? Ask
Sandy and Steven!



Types of Records



Object Types: Contact Object



Student Contact Example

The screenshot displays a CRM interface for a 'Student Contact'. A red arrow points to the 'Contact' icon and the 'First Name, Last Name' field, which are enclosed in a red box and labeled 'Object'. Below this, a red box labeled 'Related' encompasses the 'Related List Quick Links' section, which includes links for Cases (1), Program Enrollments (1), Course Connections (0), Attributes (1), Matriculations (0), Success Plans (1), Affiliated Accounts (0), Relationships (0), Addresses (0), Contact Languages (0), Campaign History (0), and Notes & Attachments (0). A third red box labeled 'Student Details' highlights the 'Details' tab and the 'Contact Details' section, which contains fields for Name (First Name, Last Name), Birthdate (DOB), Chosen Full Name, Social Security Number, Account Name, Gender (Male), Citizenship, Dual Citizenship, and Country of Origin. The interface also features a top navigation bar with buttons for Follow, Edit, New Opportunity, New Lead, and View Customer User, and a status bar at the bottom indicating 'We found no potential duplicates of this contact.'

Object

Related

Student Details

Contact

First Name, Last Name

+ Follow Edit New Opportunity New Lead View Customer User

Title Account Name Phone (2) Email Contact Owner

Dominguez Administrative Account Estela Garcia

Related List Quick Links

Cases (1) Program Enrollments (1) Course Connections (0) Attributes (1) Matriculations (0) Success Plans (1) Affiliated Accounts (0) Relationships (0)

Addresses (0) Contact Languages (0) Campaign History (0) Notes & Attachments (0)

Show Less

We found no potential duplicates of this contact.

Details Related Activity

Contact Details

Name First Name, Last Name Birthdate DOB

Chosen Full Name Social Security Number

Account Name

Gender Male Citizenship

Country of Origin Dual Citizenship

Contact Record – Deep Links

Scroll to the bottom of the Student Contact, and you will find deep links to Degree Works*, Banner Document Management System, and WebSmart. Click these links to go directly to student records within these systems.

*DegreeWorks is a link to the main DegreeWorks login, not specific student records

▼ Custom Links

[Degree Works](#)

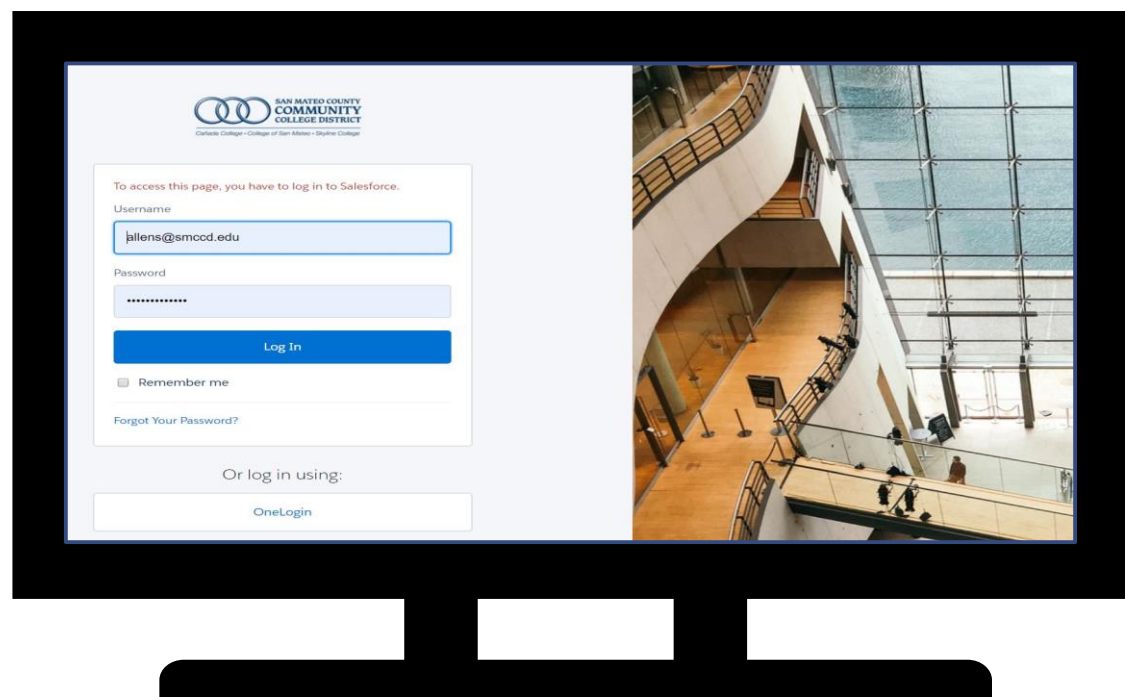
[WebSmart Counseling and Advisor Services](#)

[Banner Document Management](#)

Where to Find Data

Student Success Link Record	Key Data Metrics			
Student Contact	<ul style="list-style-type: none">GIDBirthday	<ul style="list-style-type: none">Mailing AddressDeep Links	<ul style="list-style-type: none">Preferred first namePersonal pronoun	
Student Case	<ul style="list-style-type: none">Counseling AptsCourses	<ul style="list-style-type: none">Counseling/Enrollment Team	<ul style="list-style-type: none">NotesTasks	
Program Enrollment	<ul style="list-style-type: none">Program of Study			
Course Connections	<ul style="list-style-type: none">Courses the student is enrolled in			
Attributes	<ul style="list-style-type: none">Student TypeFoster Youth	<ul style="list-style-type: none">CalWorksCARE	<ul style="list-style-type: none">EOPSPromise	
Matriculation	<ul style="list-style-type: none">Counseling StatusOrientation Status	<ul style="list-style-type: none">Ed Plan StatusAssessment Status	<ul style="list-style-type: none">MyMajors Info	
Enrollment Steps	<ul style="list-style-type: none">Enrollment Steps			

Contact Record Demo



Student Case



Student
(Contact)



Student Record
(Case Record)

Related
Lists



Counseling
Appointments
(Advising)



Enrollment/
Counseling Team
(Team)



Enrollment
Steps
(Success Plan)



Courses



Counselor Notes
(Notes)



Student Assigned
To-Dos
(Tasks)

Student Case Example

Student Record

Student Tab

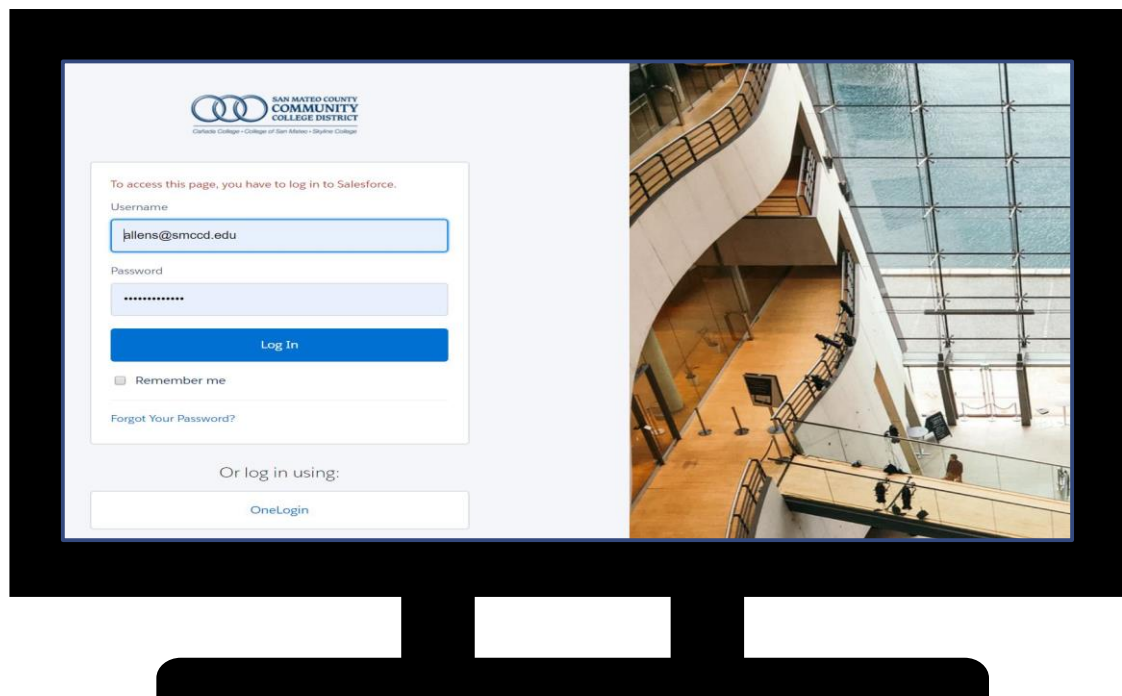
Student Contact Record

Related Lists

The screenshot displays a Salesforce interface for a 'Student Case'. The top navigation bar includes a search bar and a user profile. The main content area is divided into three sections:

- Left Sidebar:** Contains the 'Student Record' and 'Student Contact Record' sections. The 'Student Record' section shows the student's name, 'Reneyro Dominguez', and a red arrow pointing to the 'Student Record' label. The 'Student Contact Record' section shows the student's name, 'Reneyro Dominguez', and a red arrow pointing to the 'Student Contact Record' label.
- Central Section:** Titled 'Advisee Case', it features a 'Student Tab' (highlighted with a red circle) and a 'Related Lists' section (highlighted with a red circle). The 'Related Lists' section includes three lists: 'Upcoming Appointments (0)', 'Past Appointments (0)', and 'Cancelled Appointments (0)'. A red arrow points to the 'Student Tab' label.
- Right Sidebar:** Contains the 'Activity' and 'Chatter' tabs. The 'Activity' tab is selected, showing filters for 'All time', 'All activities', and 'All types'. It also includes a 'Refresh' button and a 'View All' link.

Case Record Demo

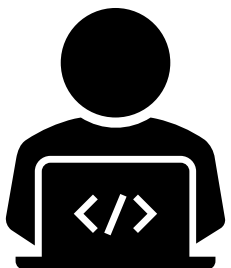


Activity#3 Find Your Student Case

Review your
Activity Guide for
instructions (pg 4)

Questions? Ask
Sandy and Steven

Click the Red X if
you need help!



Gustavo Escorcía 00029234 Cases

Gustavo Escorcía

TASKS 0 | ALERTS 0 | APPOINTMENTS 1

Last Appointment: [May 17, 2020](#)
Status: New
FERPA: ☐

Advisee Details

Name: Gustavo Escorcía

Email: escorciagustavo99@gmail.com.sample

Phone:

Case Advisee Case [+ Follow](#) [Edit](#)

Advising Team Success Plans Courses Alerts Notes More

Upcoming Appointments (1) [New Appointment](#)

TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Academic	Degree Planning	Mary Valenti	Attending	5/20/2020, 9:00 AM

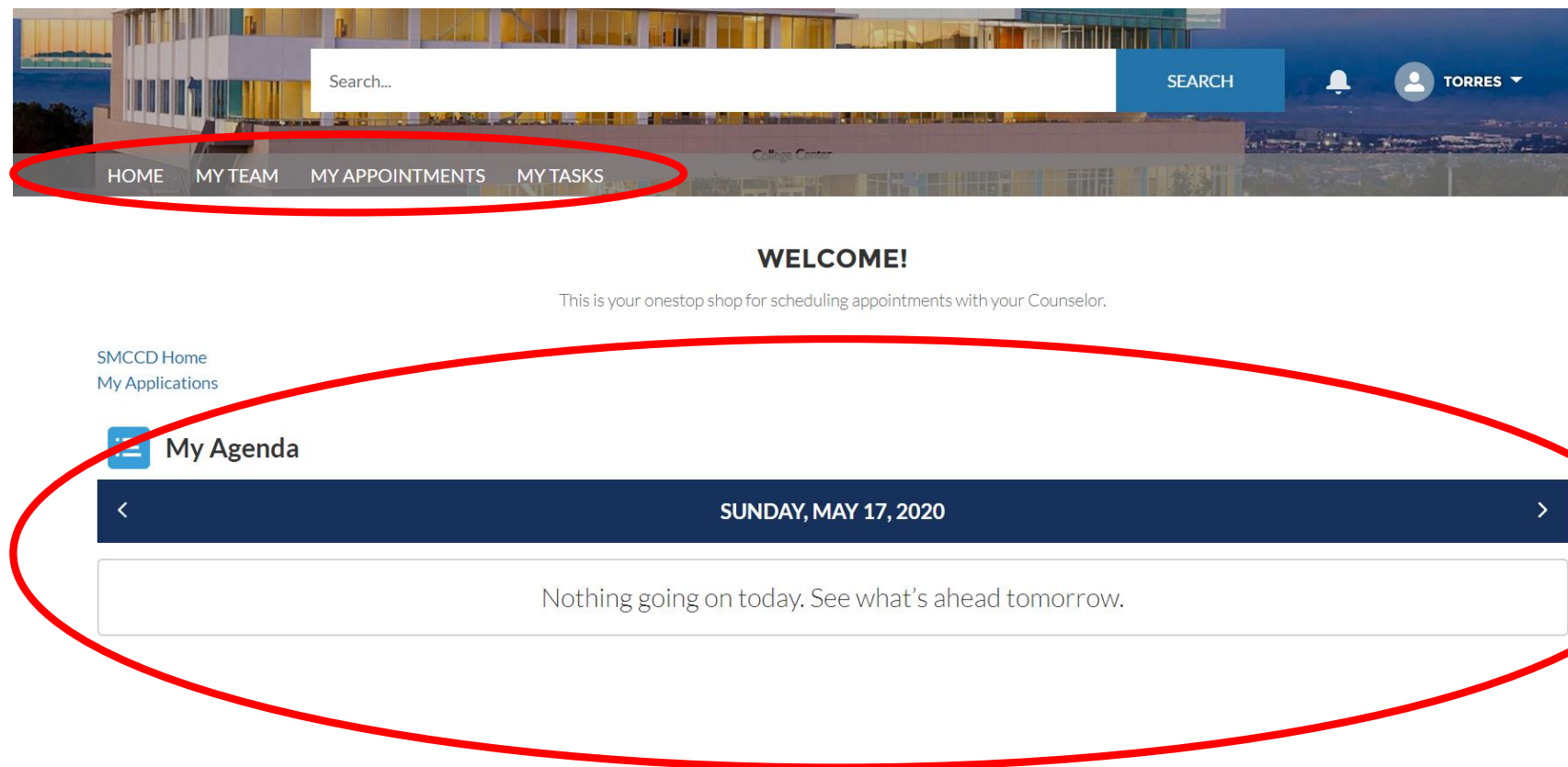
Past Appointments (2)

TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Academic	Dismissal/Reinstatement	Arielle Smith	No Show	5/17/2020, 7:23 PM
Academic	Degree Planning	Arielle Smith	Attended	5/17/2020, 6:35 PM

Cancelled Appointments (0)

Student Success Link: Navigation

Students will be directed to the Student Success Link (Salesforce) after they are admitted. They will login using SSO credentials.

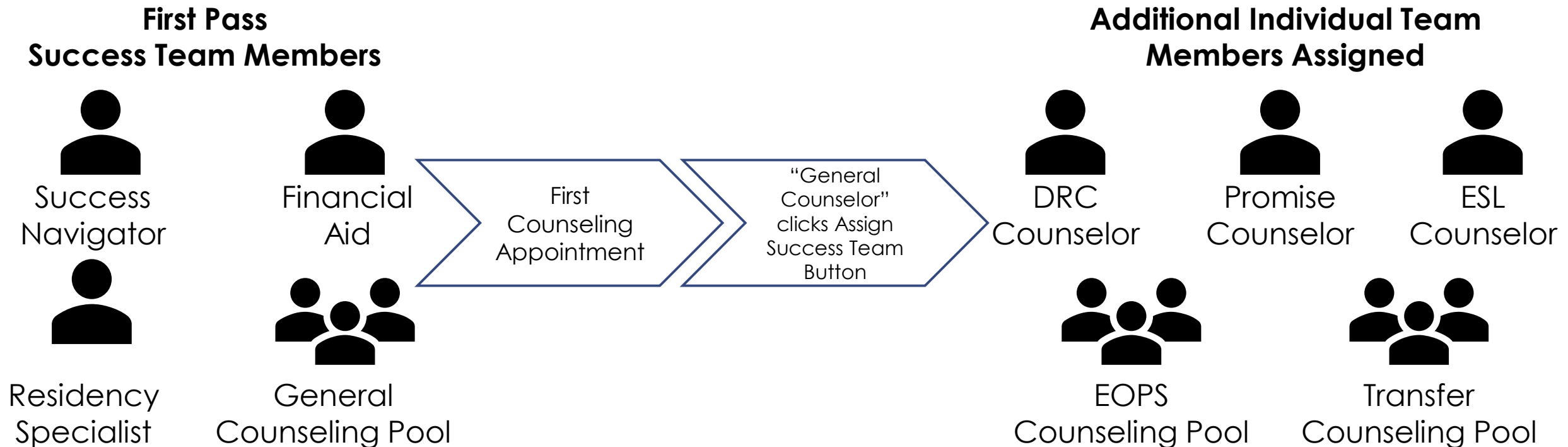


Student Success Team



About Success Team Members

Success Team Members are made up of a variety of departments including Counseling, Admissions and Records, and Financial Aid.



Student Portal: My Team

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From the Student Success Link, students can click “My Team” to see their Success Team Members, their roles, and self schedule appointments by clicking the pink calendar icon

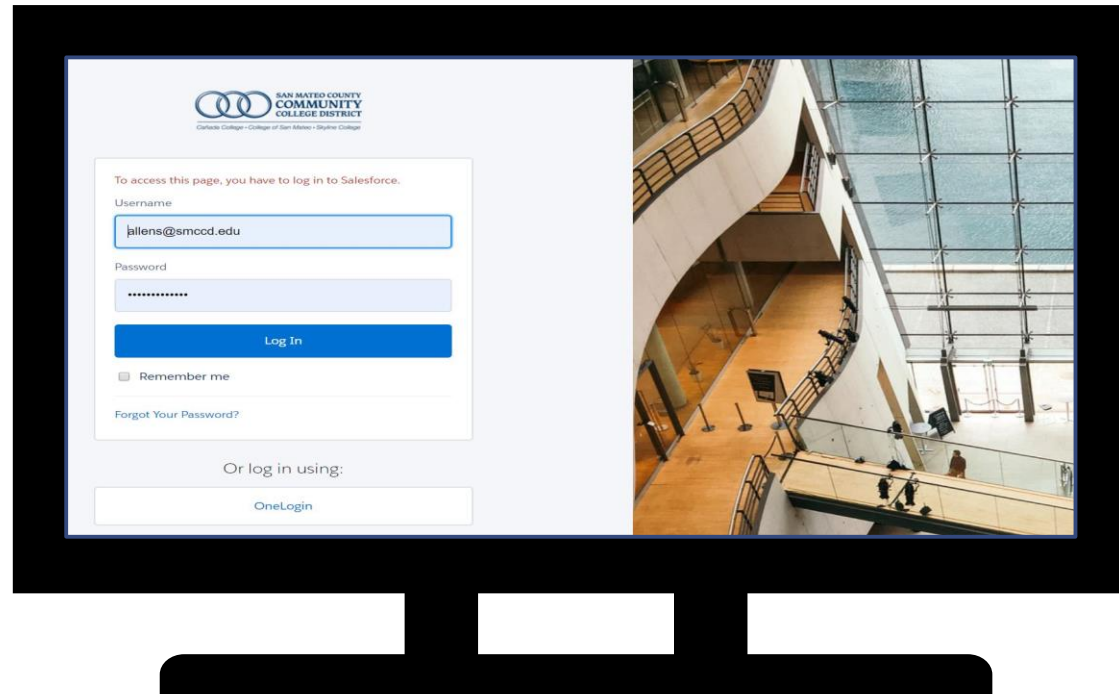
The screenshot shows the 'My Team' page in the Student Portal. The page header includes the college logo, a search bar, and a user profile for 'WANLI CAI'. The main navigation bar has links for 'HOME', 'MY TEAM', 'MY APPOINTMENTS', and 'MY TASKS'. The 'MY TEAM' section is active, displaying the 'Success Team All Members' list. The list is organized into two tabs: 'List' (selected) and 'By Team'. The list contains several team members, each with a profile picture, a pink calendar icon, and their name and role. Two team members are highlighted with red circles and red arrows pointing to them from external text labels. The first highlighted member is Cynthia Haro, with the label 'Team Member Name and Role'. The second highlighted member is Inelda Hermosillo, with the label 'Schedule appointment'.

Team Member	Role
Adela Kimball	COUNSELING General Counselor
Cynthia Haro	COUNSELING Skyline EOPS Counseling Pool EOPS Counselor
Ellen Murray	PROMISE PROGRAM LEAD Promise Counselor
Grace Beltran	Success Navigator
Inelda Hermosillo	COUNSELING Skyline EOPS Counseling Pool EOPS Counselor
Kenny Gonzalez	COUNSELING Skyline Science Technology and Health Career Counselor Pool Science, Technology & Health Career Counselor

Success Team Assignment Demo



Any
volunteers
to demo?





Student Success Plan Enrollment Steps

About Success Plans & Enrollment Steps

Salesforce has been configured for all Non-Exempt, First-Time, and First-Time Transfer Students. Every college has developed Enrollment Steps to help guide students through the Matriculation Process. Success Plans for Enrollment have been developed to assign automatically to students.

We look forward to having more Success Plans in the future, for example for Veterans or Dual Enrollment

Success Plan Template Skyline Enrollment Steps	
Related	Details
Success Plan Template Tasks (6+)	
Subject	Priority
1. Sign Up for Financial Aid	High
2. Complete Orientation	High
3. Complete MyMajors	High
5. Complete Assessment	High
4. Attend Counseling Appointment	High
6. Register for Classes	High

Success Plan Template CSM Enrollment Steps	
Related	Details
Success Plan Template Tasks (6)	
Subject	Priority
1. Apply for Financial Aid	High
Complete Assessment and Placement	High
2. Attend Welcome Orientation Wor...	High
3. Attend Counseling Appointment	High
4. Register for Classes	Normal
5. Pay Fees	High

Success Plan Template Cañada Enrollment Steps	
Related	Details
Success Plan Template Tasks (5)	
Subject	Priority
1. Apply for Financial Aid	High
2. Attend Orientation	High
3. Attend a Counseling Session	High
4. Register for Classes	High
5. Pay Fees	High

Success Plans: View Enrollment Steps

1. Navigate to the Case Record

2. Click Success Plans

3. Review Tasks

The screenshot displays the Success Plans interface for a case record. The interface is divided into several sections:

- Advisor Link:** Shows the user's name (Liam Walsh) and the case name (Wanli Cai).
- Case Record:** Displays the case name (Wanli Cai) and the case number (00036381).
- Success Plans:** A section with a tab labeled "Success Plans" (circled in red). It shows "Open Success Plans (1)" and "Closed Success Plans (0)".
- Open Success Plans (1):** A table with columns: Plan Name, Record Type, Open Tasks, and Overdue Tasks. The first row is "Skyline Enrollment Steps" with 7 Open Tasks and 0 Overdue Tasks.
- Open Activities (5):** A table with columns: Subject, Type, Status, and Priority. The first four rows are "Sign Up for Financial Aid", "Complete Orientation", "Complete Assessment", and "Attend Counseling Appointment", all with a status of "Not Started" and a priority of "High". The fifth row is "Pay Fees" with a status of "Not Started" and a priority of "Low".
- Activity History (2):** A table with columns: Subject, Type, Status, and Priority. The first two rows are "Complete MyMajors" and "Register for Classes", both with a status of "Completed" and a priority of "Normal".

Red arrows indicate the navigation steps: from the "Success Plans" tab to the "Open Success Plans (1)" section, and from the "Open Success Plans (1)" section to the "Open Activities (5)" section.

Student Success Link: Marketing Cloud Messages

Students get custom
Matriculation Marketing
Cloud emails for each
enrollment step along
the way!

Check out your Pre-
Training resources for a
look at each email



Hello <Preferred First Name>,

Now that you have completed your English and/or Math Assessment, it's time to set up an appointment with a counselor to talk about how you'll succeed at Skyline College!

In your first hour-long counseling appointment you will both review your MyMajors Assessment, review your English/Math placement, and co-create a Student Education Plan (SEP), your individual road map to achieve your education goals.

To schedule your appointment, please login to the Student Success Link found on the [MySMCCD Student Portal](#).

Please bring with you any necessary documents, such as other institution transcripts, AP Scores, etc.

If you have any questions about the enrollment process, please contact me or the counseling front desk at any time. We look forward to being part of your education journey.

<Success Navigator Name>

<Success Navigator Email>

<Success Navigator Phone Number>



[Skyline College Website](#) | [Catalog & Schedule](#)

Skyline College, 3300 College Drive, San Bruno, CA 94066
[Unsubscribe](#)



Hello <Preferred First Name>,

Welcome to Skyline College! My name is <Success Navigator First Name> and I am your Success Navigator here at the College. My role is to help you get through the various steps needed to get you registered in your classes and started on your higher education goals!

I'll be contacting you through email to help answer any questions about your next steps and encourage you to make progress in enrolling at Skyline College. So check your email frequently so you don't miss a beat!

I'll be following up soon with next steps in your enrollment steps - make sure you get started as soon as possible so you can register for your classes. You can monitor your enrollment steps in your Student Success Link, found on the [MySMCCD Student Portal](#). As you complete each step I'll send you a follow up email to help with the next step.

If you have any questions along the way, just let me know!

I look forward to working with you!

<Skyline Success Navigator Member>

<Skyline Success Navigator Phone Number>

<Skyline Success Navigator Email Address>



[Skyline College Website](#) | [Catalog & Schedule](#)

Skyline College, 3300 College Drive, San Bruno, CA 94066
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Hello <Preferred First Name>,

Welcome to Skyline College! My name is <Residency Specialist First Name> and I am your Residency Specialist here at the College. It looks like you have been classified as an "Out-of-State Student" based on the answers to questions in your admissions application and I wanted to make sure this classification is correct.

Students classified as "Out-of-State" are assessed fees that can be SIGNIFICANTLY HIGHER than students classified as "In-State", so if there's a chance that you shouldn't be classified as an Out-of-State student, I want to help you make that change!

Take a look at the [Residency Reclassification Questionnaire!](#)

After reviewing the Residency Reclassification Questionnaire, you think you may qualify as an In-State student, fill it out and bring in any supporting documentation to the Admissions and Records Office so we can see if you qualify. If you have any questions along the way, just let me know!

I look forward to working with you!

Best,
Trojans!

<Residency Specialist First Name>

<Residency Specialist Phone Number>

<Residency Specialist Email Address>



[Skyline College Website](#) | [Catalog & Schedule](#)

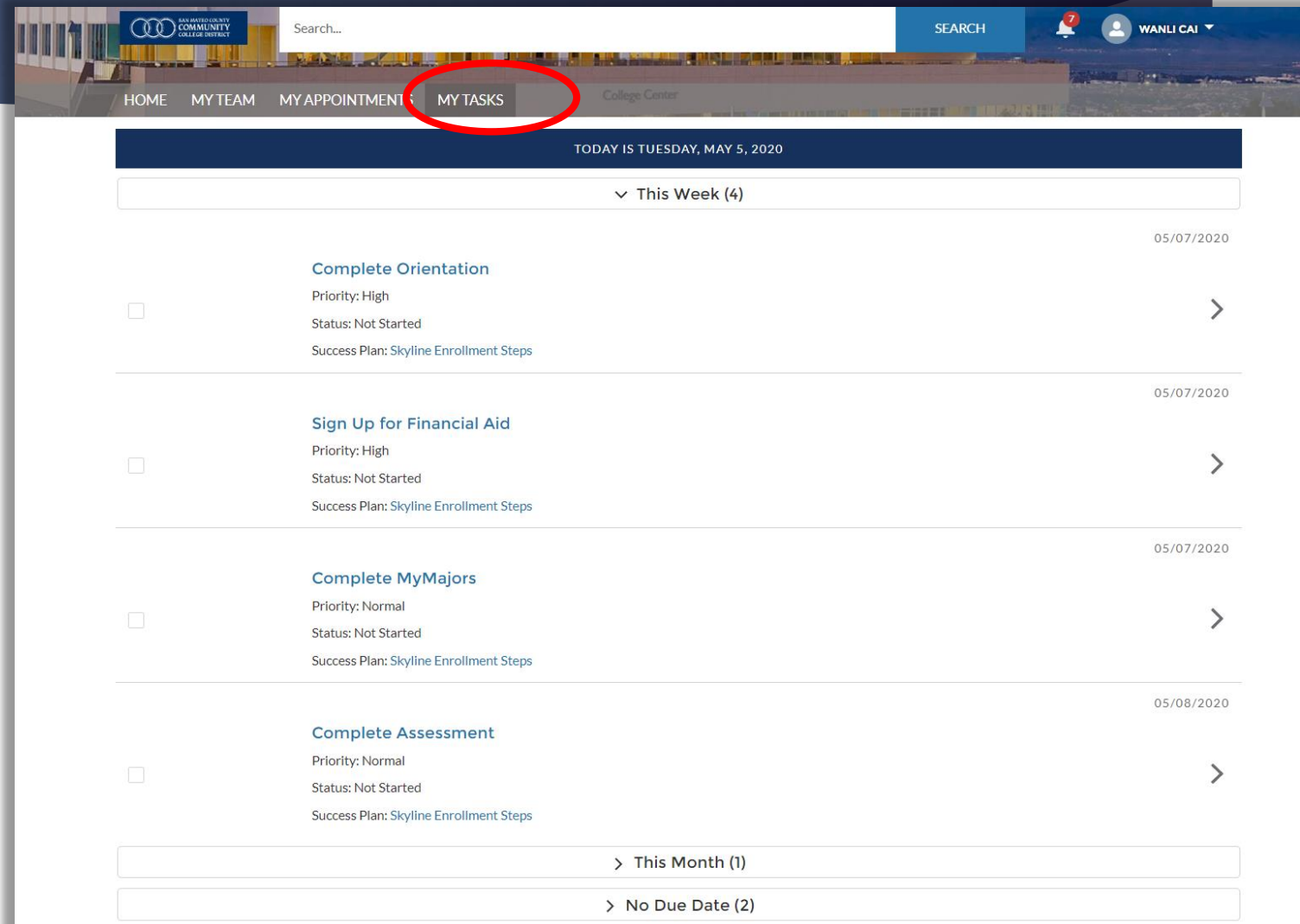
Skyline College, 3300 College Drive, San Bruno, CA 94066
[Unsubscribe](#)



Student Success Link: My Tasks

From the Student Success Link, students can click “My Tasks” to see their Enrollment Steps.

This is a view only screen for students.



Search...

SEARCH

WANLI CAI

HOME MY TEAM MY APPOINTMENT **MY TASKS**

TODAY IS TUESDAY, MAY 5, 2020

▼ This Week (4)

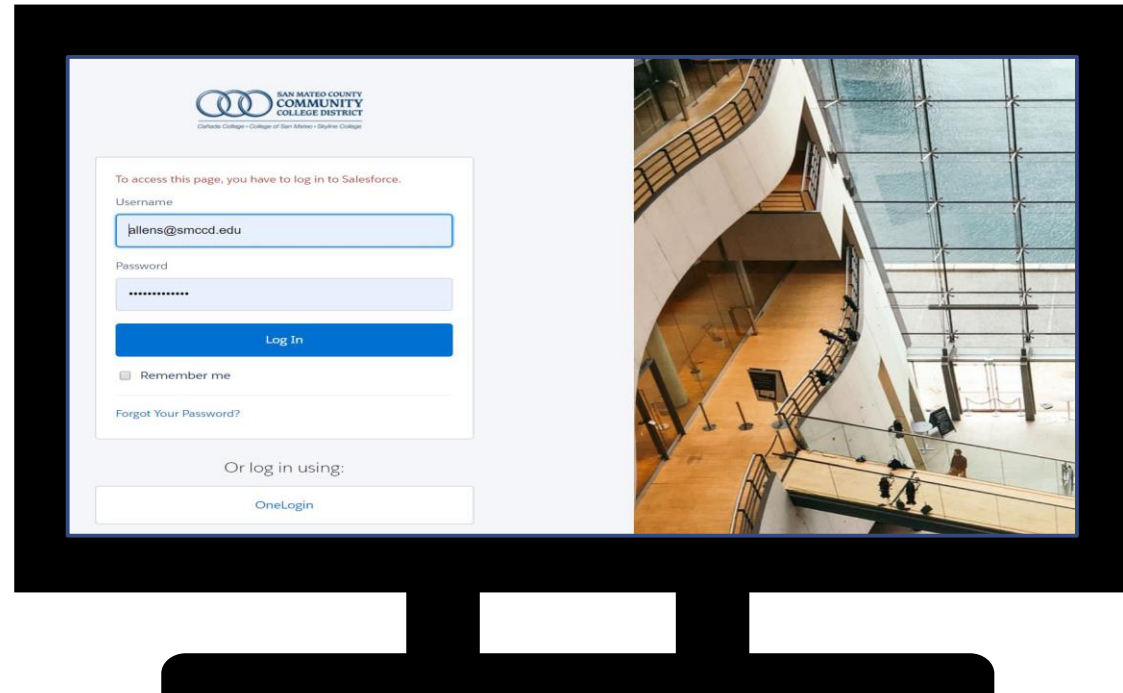
<input type="checkbox"/>	Complete Orientation Priority: High Status: Not Started Success Plan: Skyline Enrollment Steps	05/07/2020
<input type="checkbox"/>	Sign Up for Financial Aid Priority: High Status: Not Started Success Plan: Skyline Enrollment Steps	05/07/2020
<input type="checkbox"/>	Complete MyMajors Priority: Normal Status: Not Started Success Plan: Skyline Enrollment Steps	05/07/2020
<input type="checkbox"/>	Complete Assessment Priority: Normal Status: Not Started Success Plan: Skyline Enrollment Steps	05/08/2020

> This Month (1)

> No Due Date (2)

Success Plan Demo

Any
volunteers
to demo?



POP QUIZ #2!



5 Minute Break

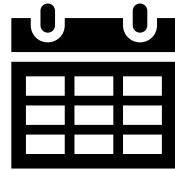


About Appointments

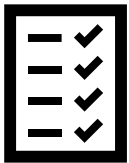


About Appointments

Students will be self-scheduling! Matriculation messages will encourage students to schedule through their Student Success Link.



Appointment Topics



Academic



Career



Disability



Health

About Appointments: Topics and Sub-Topics

Appointment Topics

Appointment Sub-Topics

Academic

- Degree Planning
- Dismissal/Reinstatement
- Grade concerns
- Graduation Audit/Transfer
- Other
- Probation Appeal/FA Appeal
- Scheduling
- Study Abroad

Career

- Exploration
- Internships
- Job Placement
- Job Readiness (Resume/Interview prep)
- Other

Disability (Private)

- Accommodations

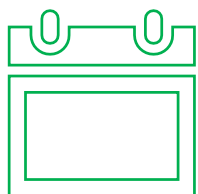
Health

- Other

About Appointments: SARS to Salesforce

'Sser Code'	'Sssp Desc'	Record Code	Record Type	Banner - SVAMSTD/Tab	Table
SS06	Student did participate in initial orientation services	SFCM01	Orientation Workshop Attendance	Orientation	SVRORNT
SS08	Student Received Counseling/Advisement Services	SFAA01	Appointment Type = Academic	Counsel/Advise	SVRCNA D
SS09.A	Student developed an abbreviated education plan	SFAA02	Appointment Type = Academic - Degree Planning	Education Plan	SVREDPL
SS10.A	Student received academic/progress probation support service	SFAA03	Appointment Type = Academic - Probation/FA Appeal	Academic Progress	SVRPRGS
SS10.C	Student facing dismissal received support service	SFAA04	Appointment Type = Academic Dismissal/Reinstatement	Academic Progress	SVRPRGS
SS11.2	Student received career, interest, or assessment services	SFAA05	Appointment Type = Career	Career/Interest	SVRCRIN
SS11.3	Student received other follow-up education planning service	SFAA06	Appointment Type = Academic - Other	Education Plan	SVREDPL

About Appointments: Appointment Record Types



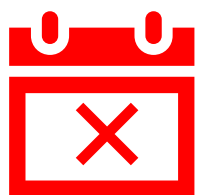
Counseling Time

A block of time that a counselor has designated as available for counseling



Counseling Event

An counseling appointment that has been scheduled in advance or a completed drop-in counseling appointment.



Non-Counseling Time

Any scheduled Event other than counseling or availability for counseling. Indicates the times when a counselor is not available for appointments because of other meetings, personal appointments, etc. If one of these Events overlaps with any scheduled availability, the Event overrides the availability.

Types of Counseling Events

Counseling events can be either for “Schedule” time or “Drop-In”

“Schedule” counseling events are scheduled in advanced, and can be self-scheduled by students and counselors, if counselors have counseling time available. These are recorded automatically if a student self-schedules and can also be recorded by counselors

“Drop-In” are for in person Drop In counseling time. These are recorded by counselors.

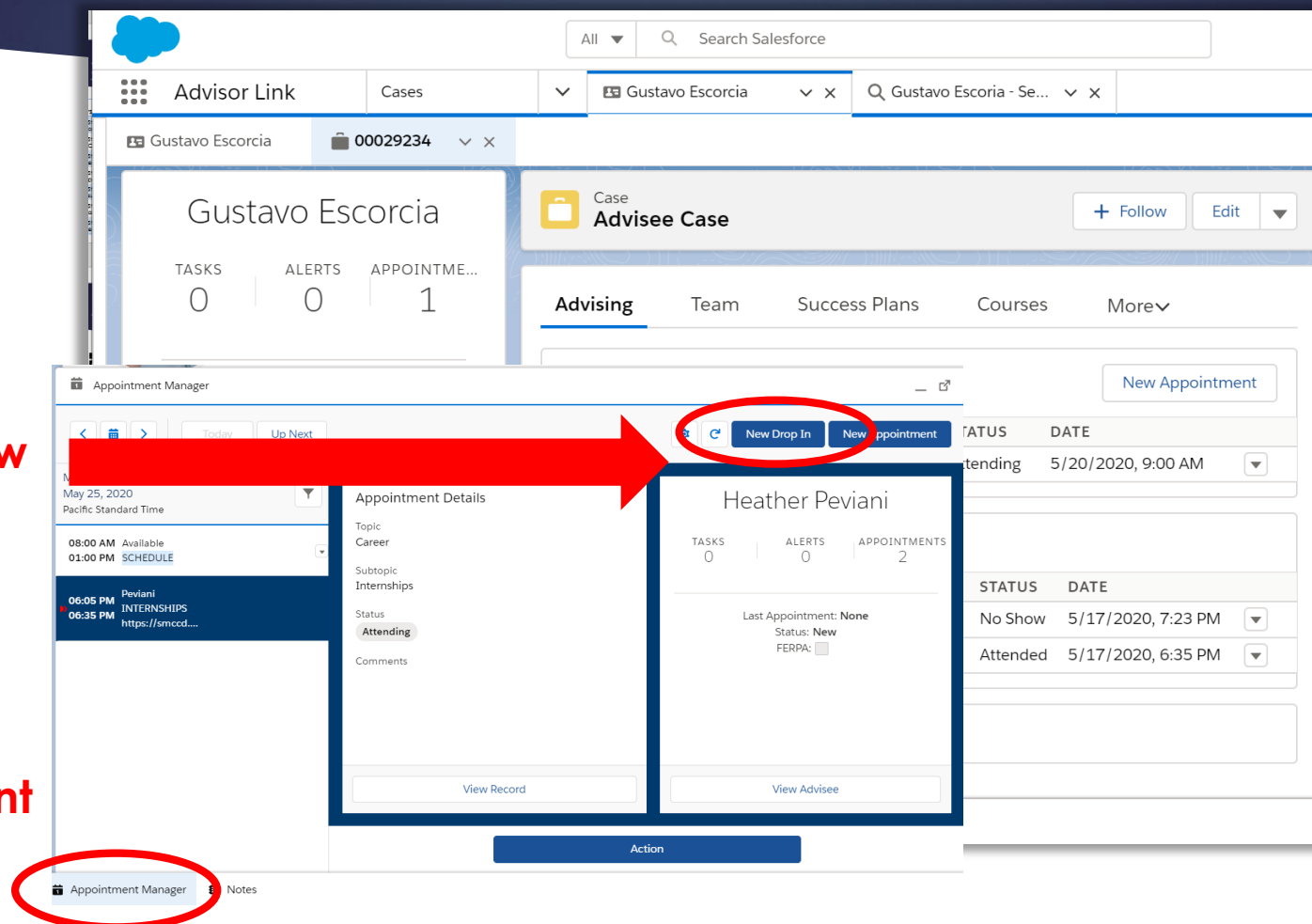


Schedule Appointments

Schedule a Drop In Appointment

2. Click “New Drop In”

1. Click the Appointment Manager



Schedule a Drop In Appointment

3. Search Advisee in "Invitee"

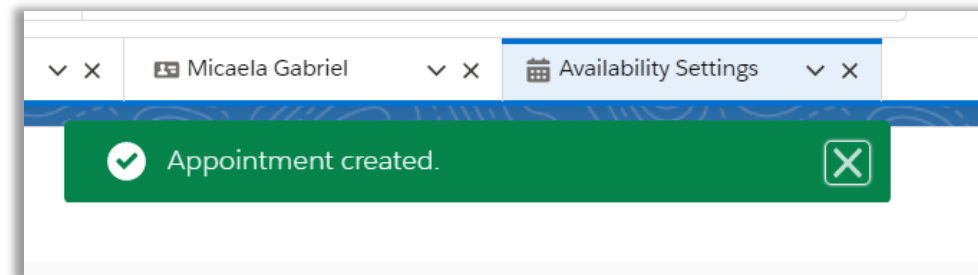
4. Select Location

5. Select topic and subtopic

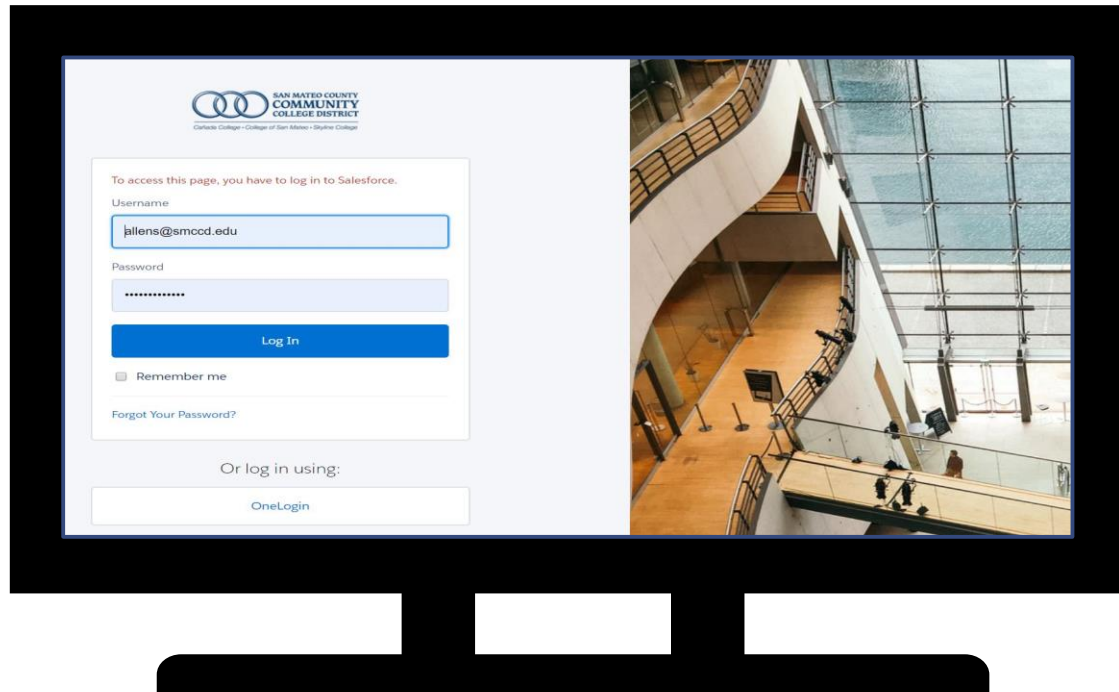
6. Select drop in duration

7. Click Save and Appointment is created

The screenshot shows a web form titled "Create Drop In Appointment". It is divided into several sections: "Basics", "Agenda", "Description", and "Duration". In the "Basics" section, the "Invitee" field (with a "Search Advisees" placeholder) and the "Location" dropdown (currently showing "In person") are highlighted with red boxes. In the "Agenda" section, the "Topic" dropdown (showing "-- Select One --") is highlighted with a red box. In the "Duration" section, the "Duration" dropdown (showing a value and "Minutes") is highlighted with a red box.



Demo Drop In Appointment





Third Party Scheduling Appointments

About Third Party Scheduling

Third party scheduling can be used to schedule appointment time, edit appointment time, or cancel appointment time on behalf of a counselor.

Third Party Scheduling

2. Click "New Appointment"

1. Click the Appointment Manager

The screenshot displays the Salesforce interface for a user named Gustavo Escoria. The top navigation bar includes the Salesforce logo, a search bar, and tabs for 'Advisor Link', 'Cases', and 'Gustavo Escoria'. Below the navigation bar, the 'Appointment Manager' section is visible, showing a calendar for Monday, May 25, 2020. A red arrow points from the 'New Appointment' button in the 'Appointment Manager' section to the 'New Appointment' button in the 'Appointment Details' section. The 'Appointment Details' section shows the appointment for Heather Peviani, with a status of 'Attending' and a date of 5/20/2020, 9:00 AM. The 'Appointment Manager' section also shows a list of appointments, including one for Heather Peviani on 5/17/2020 at 6:35 PM.

Appointment Manager

Monday
May 25, 2020
Pacific Standard Time

08:00 AM Available
01:00 PM SCHEDULE

06:05 PM Peviani
06:35 PM INTERNSHIPS
https://smccd...

Appointment Details

Topic
Career

Subtopic
Internships

Status
Attending

Comments

View Record

Heather Peviani

TASKS 0 | ALERTS 0 | APPOINTMENTS 2

Last Appointment: None
Status: New
FERPA: ☐

View Advisee

Appointment Manager | Notes

Appointment Details

Topic
Career

Subtopic
Internships

Status
Attending

Comments

View Record

Heather Peviani

TASKS 0 | ALERTS 0 | APPOINTMENTS 2

Last Appointment: None
Status: New
FERPA: ☐

View Advisee

Appointment Manager | Notes

Third Party Scheduling

3. Select Advising Event

New Appointment

Select a record type for this Appointment.

☐ Non-Advising Event

☒ Advising Event

☐ Advising Time

4a)

4b)

4d)

4e)

New Appointment

Basics

* Assigned Advisor

Mary Valenti X

4c)

* Invitee

Hanna Wai X

* Location

<https://smccd.zoom.us/j/6822537626>

☐ Web Meeting

Agenda

* Topic

Academic

* Subtopic

Degree Planning

Description

4. Complete the Basics

4a) Search Assigned Counselor, pick another counselor

4b) Search Invitee, the student

4c) Select Location, the counselor's Zoom Personal ID

4d) Select Topic and Subtopic

4e) Complete a brief description

Third Party Scheduling

4) Select Predefined Availability or One-Off Appointment

If you select Predefined Availability, you can select “First Available” to see upcoming times available

One-Off Appointment will prompt you to complete Date and Time for Appointment

5) Click Save

Date and Time

Predefined Availability One-Off Appointment

First Available

Friday, May 29, 2020

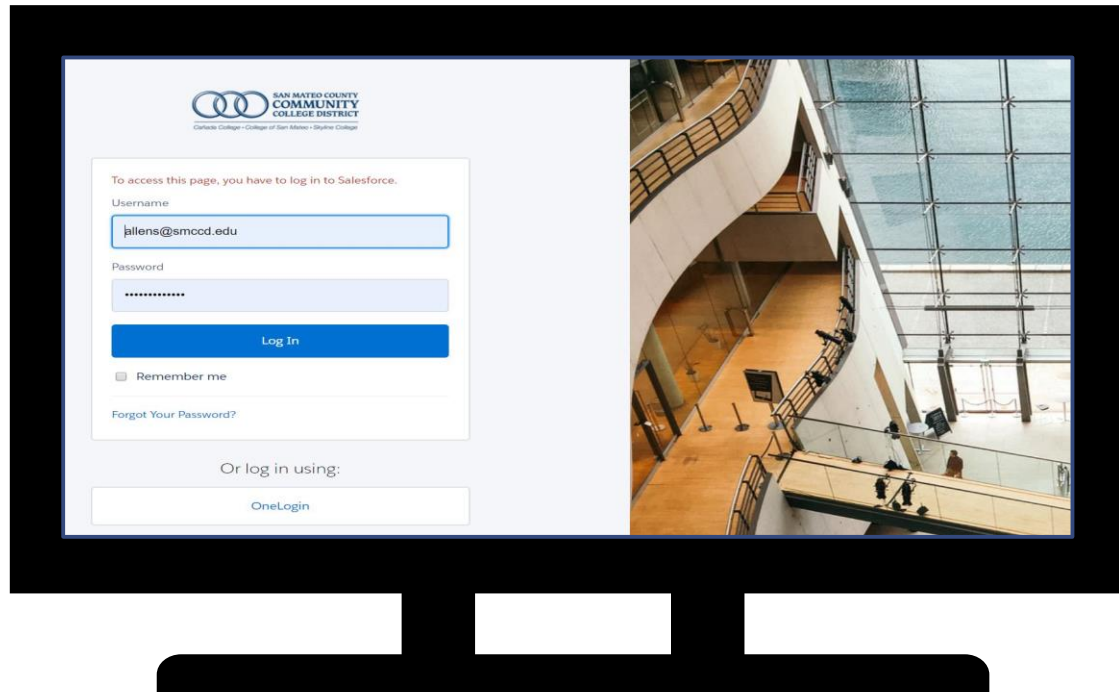
SUN	MON	TUE	WED	THU	FRI	SAT
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

AVAILABLE TIMES FRIDAY, MAY 29, 2020

- ☒ 8:00 AM to 8:30 AM PDT
- ☐ 8:30 AM to 9:00 AM PDT
- ☐ 9:00 AM to 9:30 AM PDT
- ☐ 9:30 AM to 10:00 AM PDT
- ☐ 10:00 AM to 10:30 AM PDT
- ☐ 10:30 AM to 11:00 AM PDT
- ☐ 11:00 AM to 11:30 AM PDT
- ☐ 11:30 AM to 12:00 PM PDT
- ☐ 12:00 PM to 12:30 PM PDT
- ☐ 12:30 PM to 1:00 PM PDT

Save

Demo Third Party Scheduling

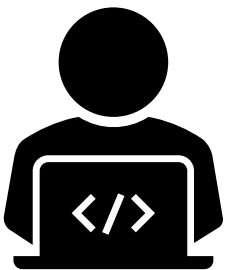



Any
volunteers
to demo?

Activity#4 Schedule an Appointment for Someone Else

Review your
Activity Guide for
instructions (pg 5)


Questions? Ask
Sandy and Steven!



 **New Appointment**

Basics

* Assigned Advisor

 Sandy Allen X

* Invitee

Search Advisees

* Location

-- Select One --

☐ Web Meeting

Agenda

* Topic

-- Select One --

Description

Date and Time

Save



Outlook Integration

Outlook Integration

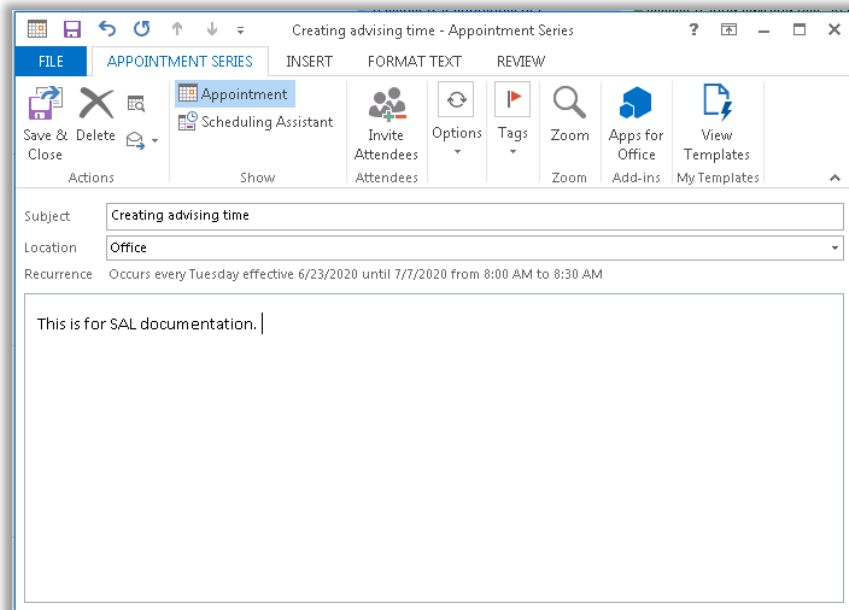
Riva is an Outlook Integration tool we are using to sync Student Success Link counseling appointments to Outlook.

Counseling Events (Appointments) should be **CREATED** in the Student Success Link. These have uni-directional integration for creation. Newly created Counseling Events **ONLY** integrate from the Student Success Link to Outlook. You can **EDIT** existing Counseling Events in Outlook and they will sync to the Student Success Link.

Counseling Time (availability) and Non Counseling Events have bi-direction integration. These integrate from the Student Success Link to Outlook **OR** from Outlook to the Student Success Link.

Outlook Integration: Counseling Time

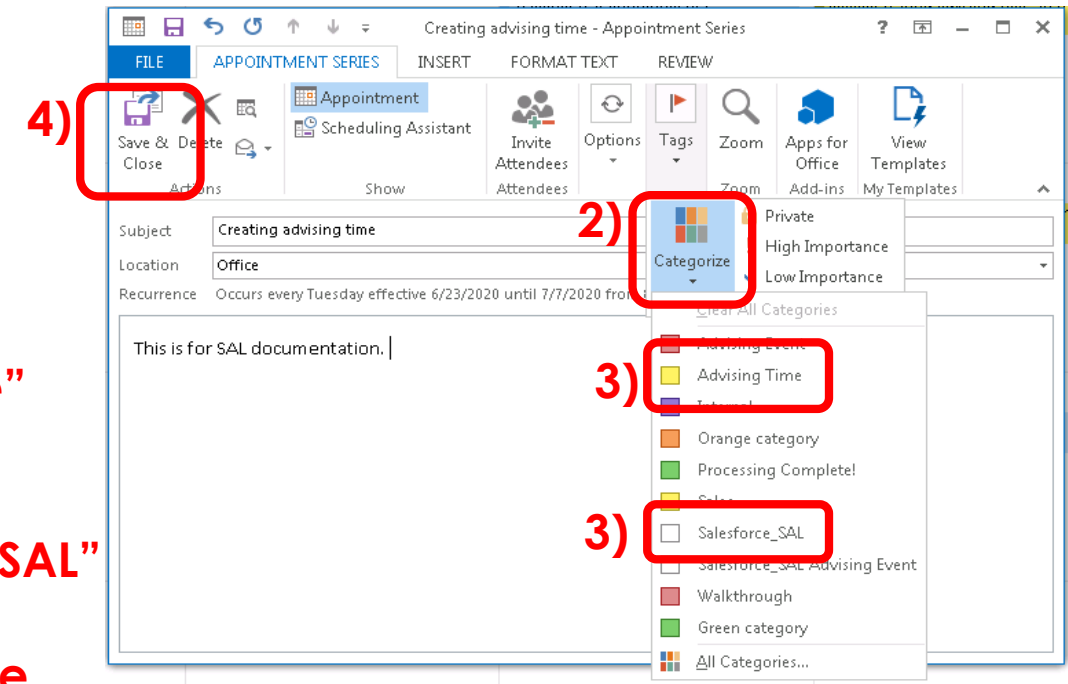
1) To create additional Counseling Time in Outlook, create a normal Outlook Appointment with the time you want to indicate as time available for counseling.



2) Click “Categorize”

3) Select “Advising Time” & “Salesforce_SAL”

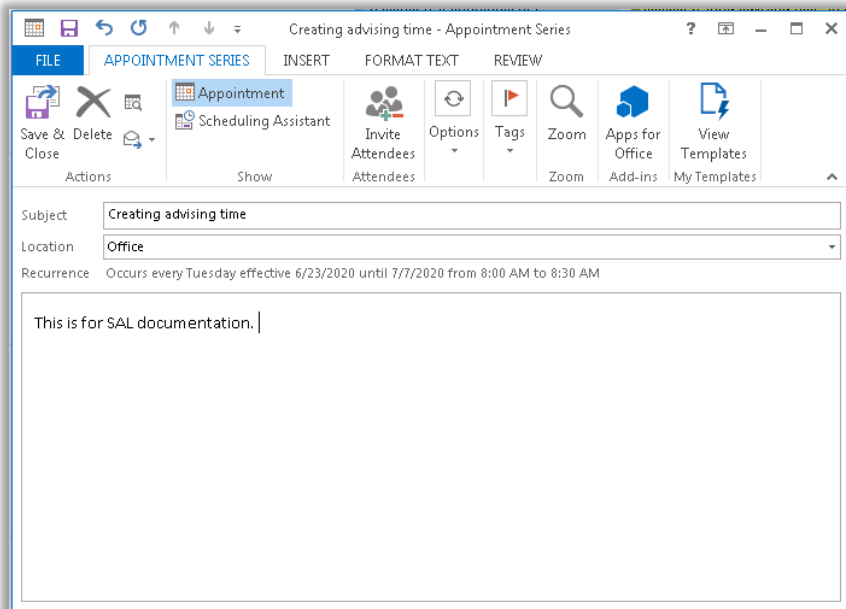
4) Click Save & Close



Note - If this is a recurring series make sure to disable “All day event”, or it won’t sync.

Outlook Integration: Non Counseling Time

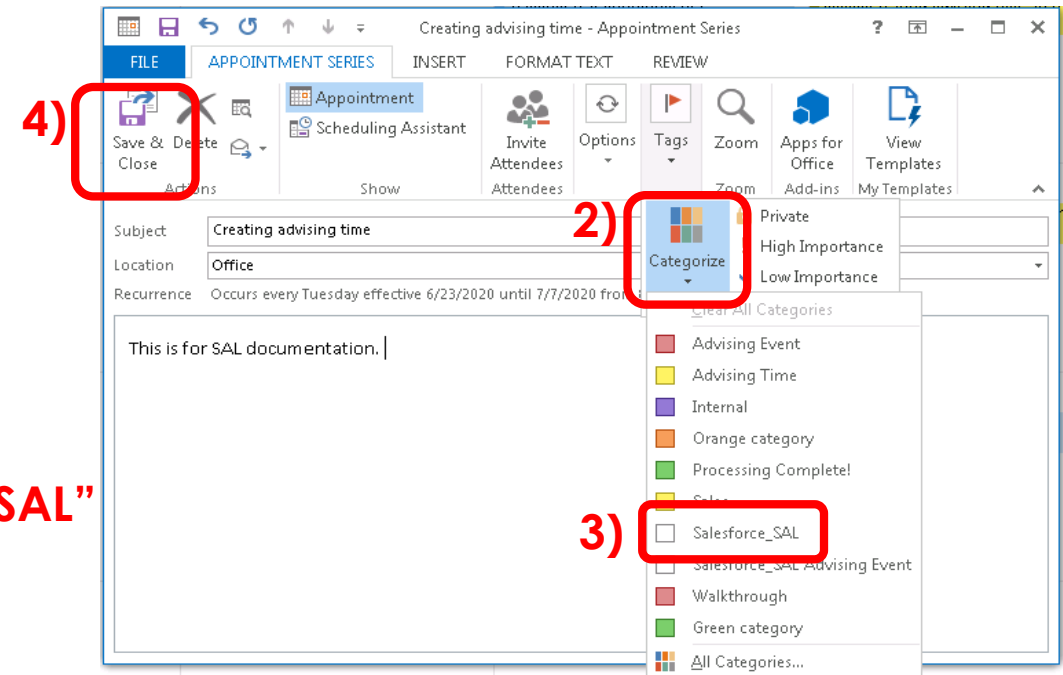
1) To create Non Counseling time in Outlook, create a normal Outlook Appointment with the time you want to indicate as time available for counseling.



2) Click “Categorize”

3) Select “Salesforce_SAL”

4) Click Save & Close



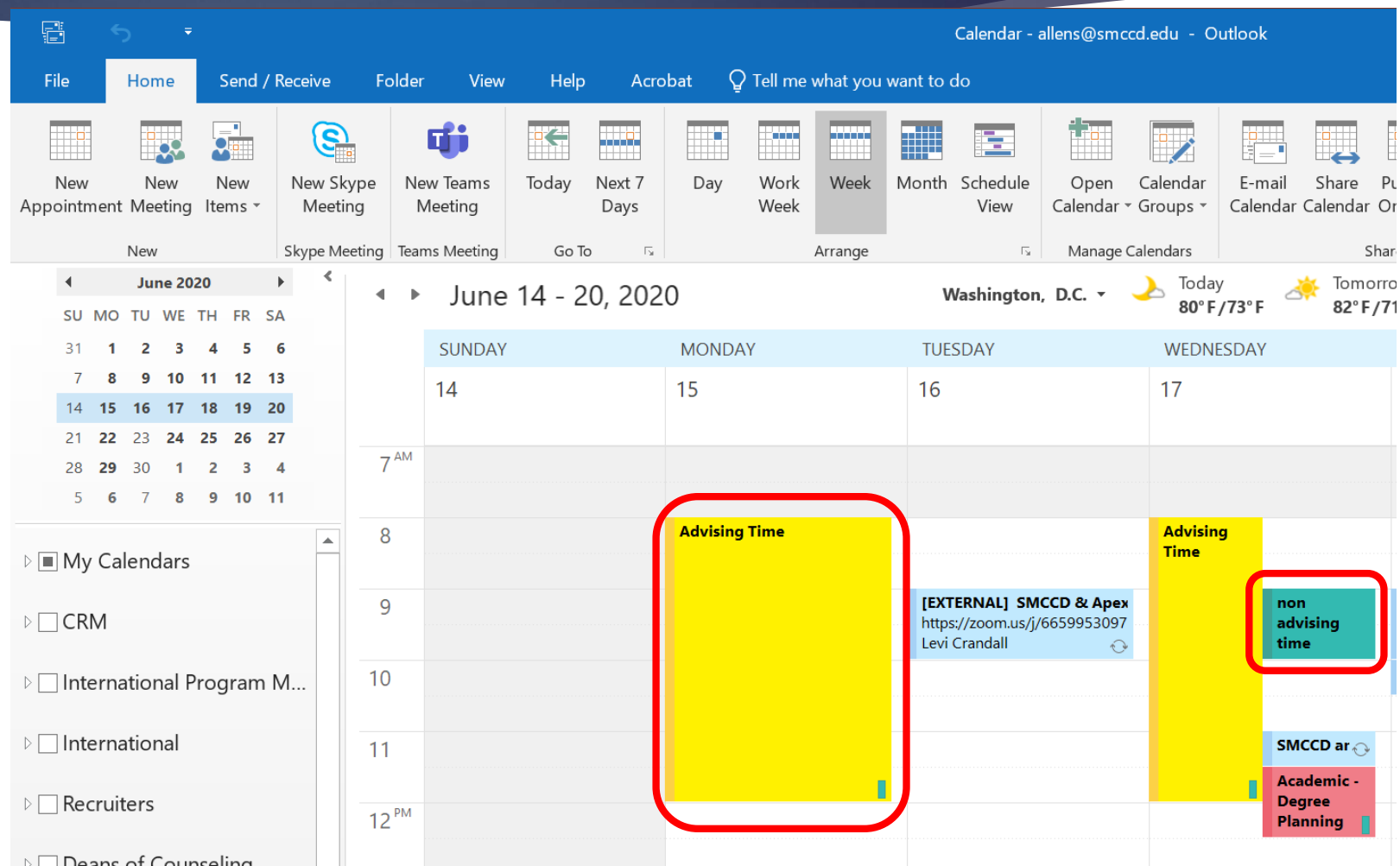
Note - If this is a recurring series make sure to disable “All day event”, or it won’t sync.

Riva Example

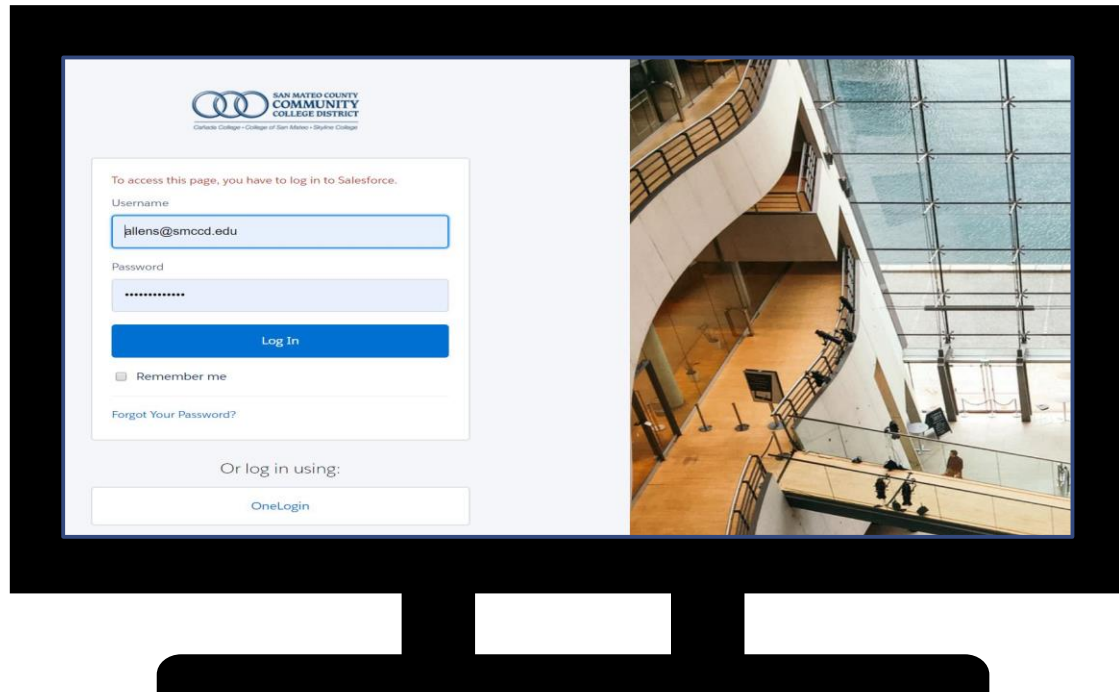
Yellow blocks = Counseling Time (Availability)

Green blocks = Non Counseling Events (Not Available)

Red = Counseling Event (Appointment scheduled)



Demo Outlook Integration



Editing Appointments



Editing Appointment

1) Locate the student Case Record and view their upcoming appointments listed under “Advising”

Remember, you can also edit existing appointment times in Outlook!

The screenshot shows the 'Advising Link' interface for a student named Nicholas Lau. The interface includes a top navigation bar with 'Advisor Link', 'Home', and a search bar. Below the navigation bar, there are tabs for 'Nicholas Lau', '00040038', 'Academi...', and 'Cases'. The main content area is divided into two columns. The left column displays 'Nicholas Lau' with 'TASKS 0' and 'APPOINTMENTS 1'. Below this, it shows 'Last Appointment: None', 'Status: New', and a 'FERPA' checkbox. The right column has a 'Case Advisee Case' header with '+ Follow' and 'Assign Success Team' buttons. Below the header is a tabbed interface with 'Advising' selected. The 'Advising' tab shows 'Upcoming Appointments (1)' with a 'New Appointment' button. A table lists the appointment details:

TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Academic	Degree Planning	Sandy Allen	Attending	6/25/2020, 2:30 PM

Below the table are sections for 'Past Appointments (0)' and 'Cancelled Appointments (0)'. The 'Advising' tab is highlighted with a red box, and the 'Upcoming Appointments (1)' section and its table are also highlighted with a red box.

Editing Appointment

2) Click the Appointment Topic to go to the Appointment Record

The screenshot displays the 'Adviser Link' interface for a user named Nicholas Lau. The interface includes a top navigation bar with 'Advisor Link', 'Home', and a search bar. Below the navigation bar, there are tabs for 'Nicholas Lau', '00040038', 'Academi...', and 'Cases'. The main content area is divided into two columns. The left column shows 'Nicholas Lau' with 'TASKS 0' and 'APPOINTMENTS 1'. Below this, it states 'Last Appointment: None', 'Status: New', and 'FERPA: ☐'. The right column has a 'Case Advisee Case' header with '+ Follow' and 'Assign Success Team' buttons. Below this is a tabbed interface with 'Advising', 'Team', 'Success Plans', 'Courses', 'Alerts', and 'More'. The 'Advising' tab is active, showing 'Upcoming Appointments (1)' with a 'New Appointment' button. A table lists the appointment with columns: TOPIC, SUBTOPIC, OWNER, STATUS, and DATE. The 'Academic' topic is highlighted with a red box. Below the table are sections for 'Past Appointments (0)' and 'Cancelled Appointments (0)'. The 'Advisee Details' section on the left shows 'Nicholas Lau' with fields for Title, Account Name, Phone, and Email.

Advisor Link Home Nicholas Lau - Search Nicholas Lau

Nicholas Lau 00040038 Academi... Cases

Nicholas Lau

TASKS 0 | APPOINTMENTS 1

Last Appointment: None
Status: New
FERPA: ☐

Advisee Details

Nicholas Lau

Title Account Name
Lau Administrative Acc...

Phone Email

Case Advisee Case + Follow Assign Success Team

Advising Team Success Plans Courses Alerts More

Upcoming Appointments (1) New Appointment

TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Academic	Degree Planning	Sandy Allen	Attending	6/25/2020, 2:30 PM

Past Appointments (0)

Cancelled Appointments (0)

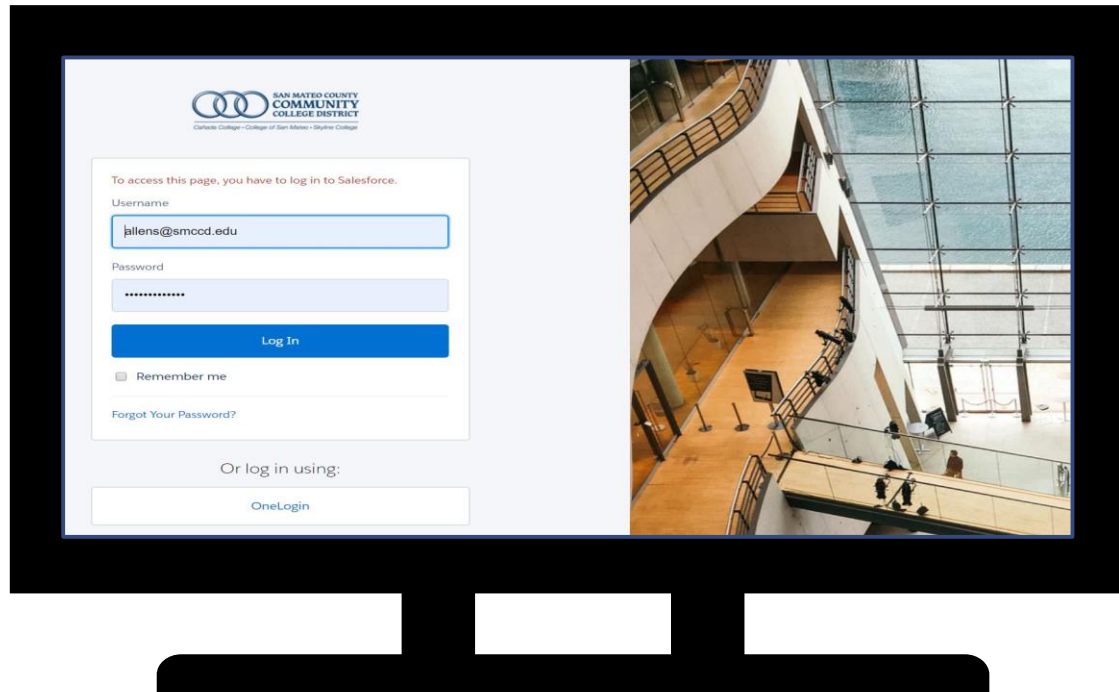
Editing Appointment

3) From here you can edit appointment times, topics, location, or mark a student attended

The screenshot shows the 'Appointment Academic - Degree Planning' interface. The top navigation bar includes a 'Mark Attended' button, a 'Create Appointment' button, and a 'New Opportunity' dropdown menu. The main content area is divided into two columns. The left column contains the 'Appointment Subject' (Academic - Degree Planning), 'Start' (6/25/2020 2:30 PM), 'End' (6/25/2020 3:00 PM), 'Location' (https://smccd.zoom.us/j/6822537626), 'Description', 'Created By' (Grace Beltran, 5/28/2020 1:41 AM), and 'Last Modified By' (Grace Beltran, 5/28/2020 1:41 AM). The right column contains the 'Owner' (Sandy Allen), 'Type' (Academic), and 'Subtopic' (Degree Planning). Red boxes highlight the 'Mark Attended' button, the 'Start' and 'End' time fields, and the 'Topic' and 'Subtopic' fields.

Related	Details
Appointment Subject	Academic - Degree Planning
Start	6/25/2020 2:30 PM
End	6/25/2020 3:00 PM
Location	https://smccd.zoom.us/j/6822537626
Description	
Created By	Grace Beltran, 5/28/2020 1:41 AM
Last Modified By	Grace Beltran, 5/28/2020 1:41 AM
Owner	Sandy Allen
Type	Academic
Subtopic	Degree Planning

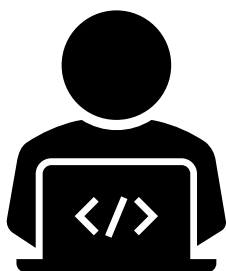
Demo Editing Appointments



Activity#5 Update Appointment Status

Review your
Activity Guide for
instructions (pg 7)

Questions? Ask
Sandy and Steven!



Appointment

Academic - Degree Planning

Mark Attended

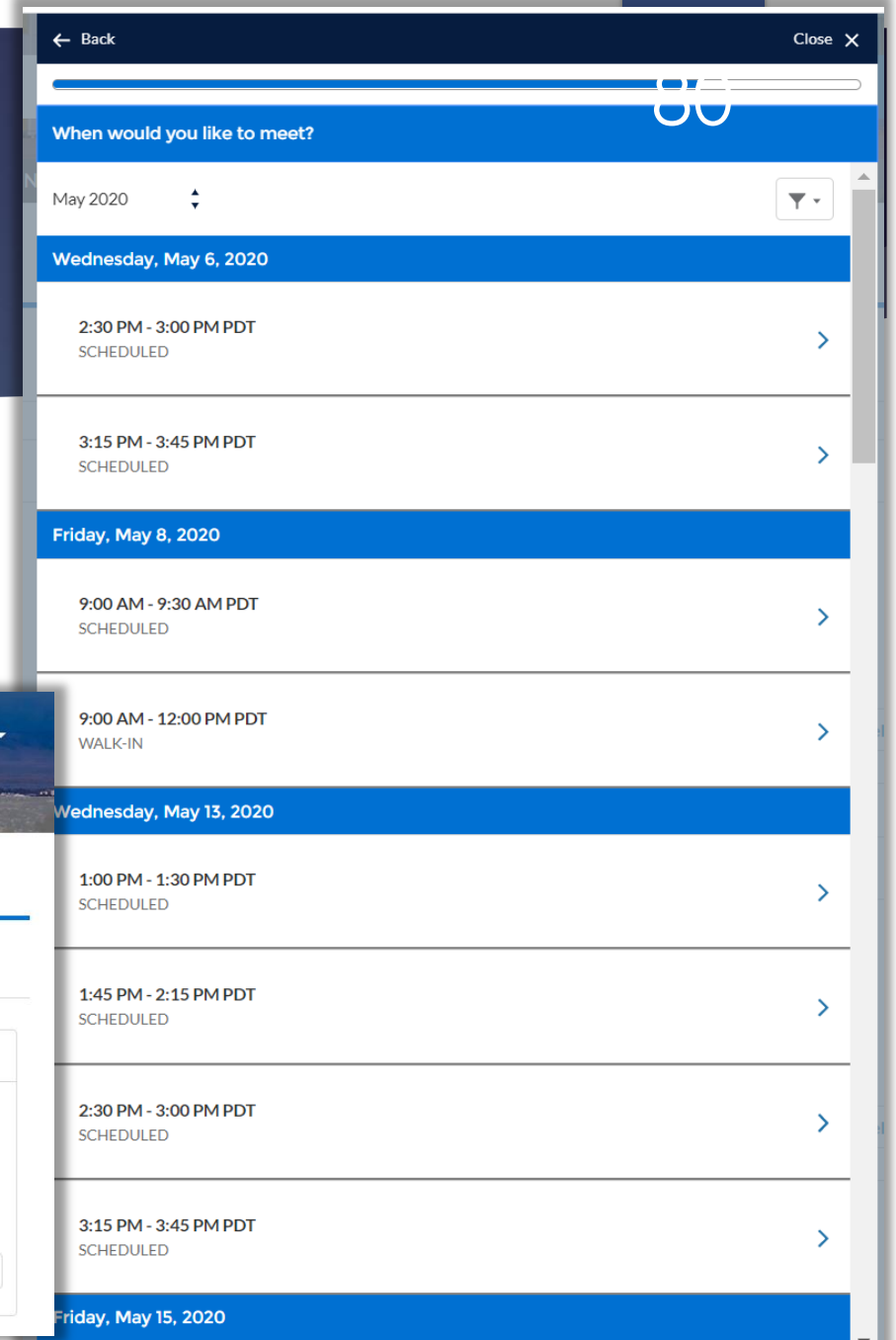
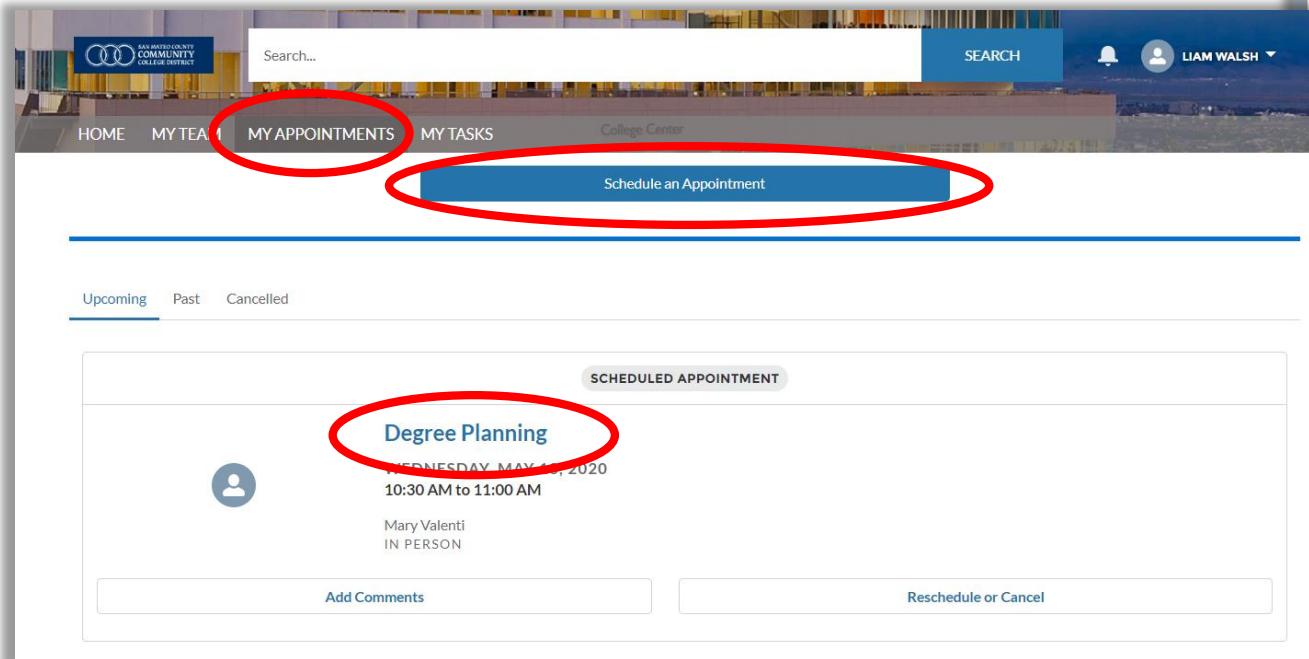
Create Appointment

New Opportunity

Related	Details
Appointment Subject	Owner
Academic - Degree Planning	Sandy Allen
Start	Type
6/25/2020 2:30 PM	
End	Topic
6/25/2020 3:00 PM	Academic
Location	Subtopic
https://smccd.zoom.us/j/6822537626	Degree Planning
Description	
Created By	Last Modified By
Grace Beltran, 5/28/2020 1:41 AM	Grace Beltran, 5/28/2020 1:41 AM

Student Success Link: My Appointments

From the Student Success Link, students can click “My Appointments” to self schedule appointments and select appointment Topic and Subtopic. They can select the counselor and time slot based on team member’s availability.



Resources and Next Steps



Future Phases

- ▶ **Phase 2 Soft Launch (June 15th)**
 - ▶ Counseling, Matriculation, Success Teams, Success Plans
- ▶ Phase 3
 - ▶ Early Alerts
- ▶ Phase 4
 - ▶ Grant/Categorical Programs/Additional Services
- ▶ Phase 5
 - ▶ Workforce Development
- ▶ Phase 6
 - ▶ Adult Education
- ▶ Phase 7
 - ▶ Articulation Services
- ▶ Phase 8
 - ▶ Alumni Relations

Resources Soft Launch

- ▶ Training Guide/Slide Deck
- ▶ Videos for Everyday Salesforce Tasks
- ▶ Recorded Zoom Resources
- ▶ Matriculation Emails
- ▶ Feedback Form
 - ▶ <https://www.surveymonkey.com/r/GRTNKT3>
- ▶ Follow up Meeting and Office Hours Starting June 16th
 - ▶ Office Hours: Tues 1pm-2pm
 - ▶ Office Hours: Thur 11am-12pm
- ▶ Email Sandy and Steven for Questions!

Next Steps

- ▶ Further Integration
- ▶ Fall will be Full Phase 2 Launch
- ▶ Future phases