

# 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



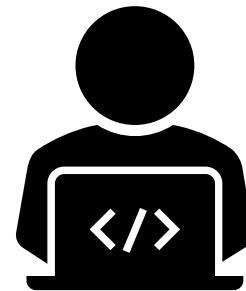
I'm Ira  
Glass, stay  
with us!



## Demo



## DIY Activity Guide



# 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



- ▶ 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

Last Name

Mobile Phone

Receive Texts?

Email

Area of Interest

[Submit](#)

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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, remote 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

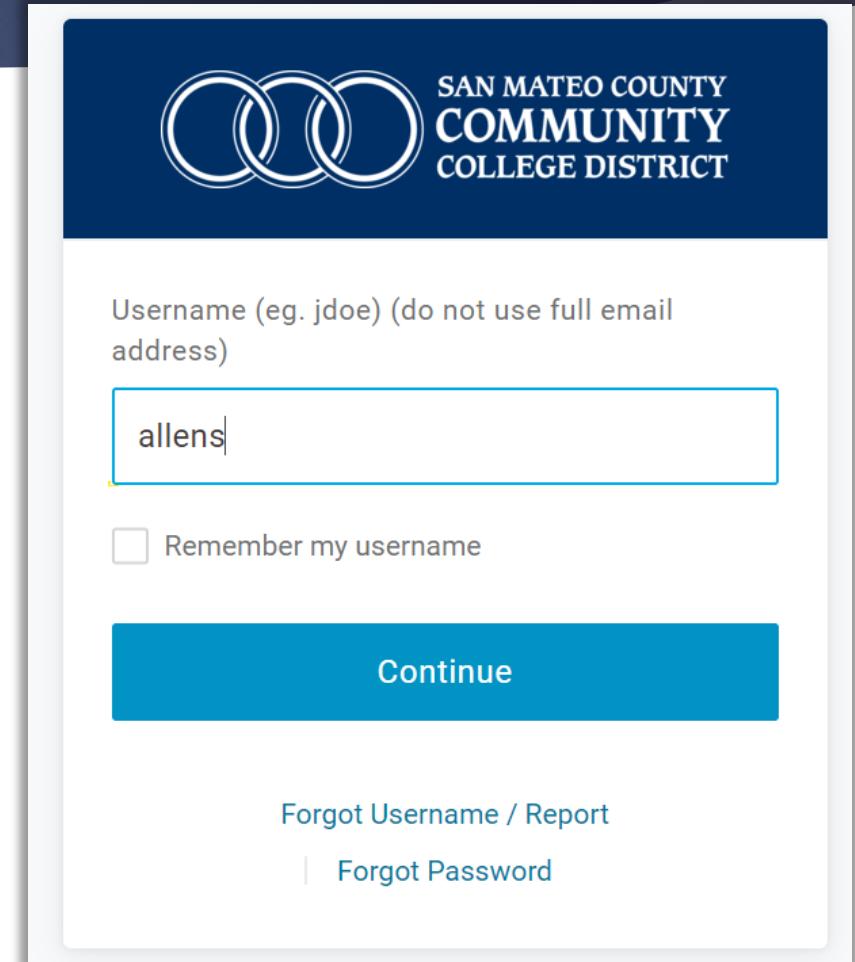
- ▶ You may see language in Salesforce that references “Advisor”. The application we’re using is called “Advisor Link”, so we changed it where we could, but you may still see some references to Advisor.
- ▶ Anything referencing “Advisors” is only in the internal view of Salesforce, all Students see language 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 14<sup>th</sup>
- ▶ 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](https://smccd.edu/studenttutorials/onelogin_tutorial.php)



The image shows a OneLogin login page for the San Mateo County Community College District. The header features the district's logo, which consists of three overlapping circles, and the text "SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT". The main form area has a light gray background. It contains a text input field labeled "Username (eg. jdoe) (do not use full email address)" with the value "allens" entered. Below the input field is a checkbox labeled "Remember my username". At the bottom of the form is a large blue "Continue" button. Below the "Continue" button, 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

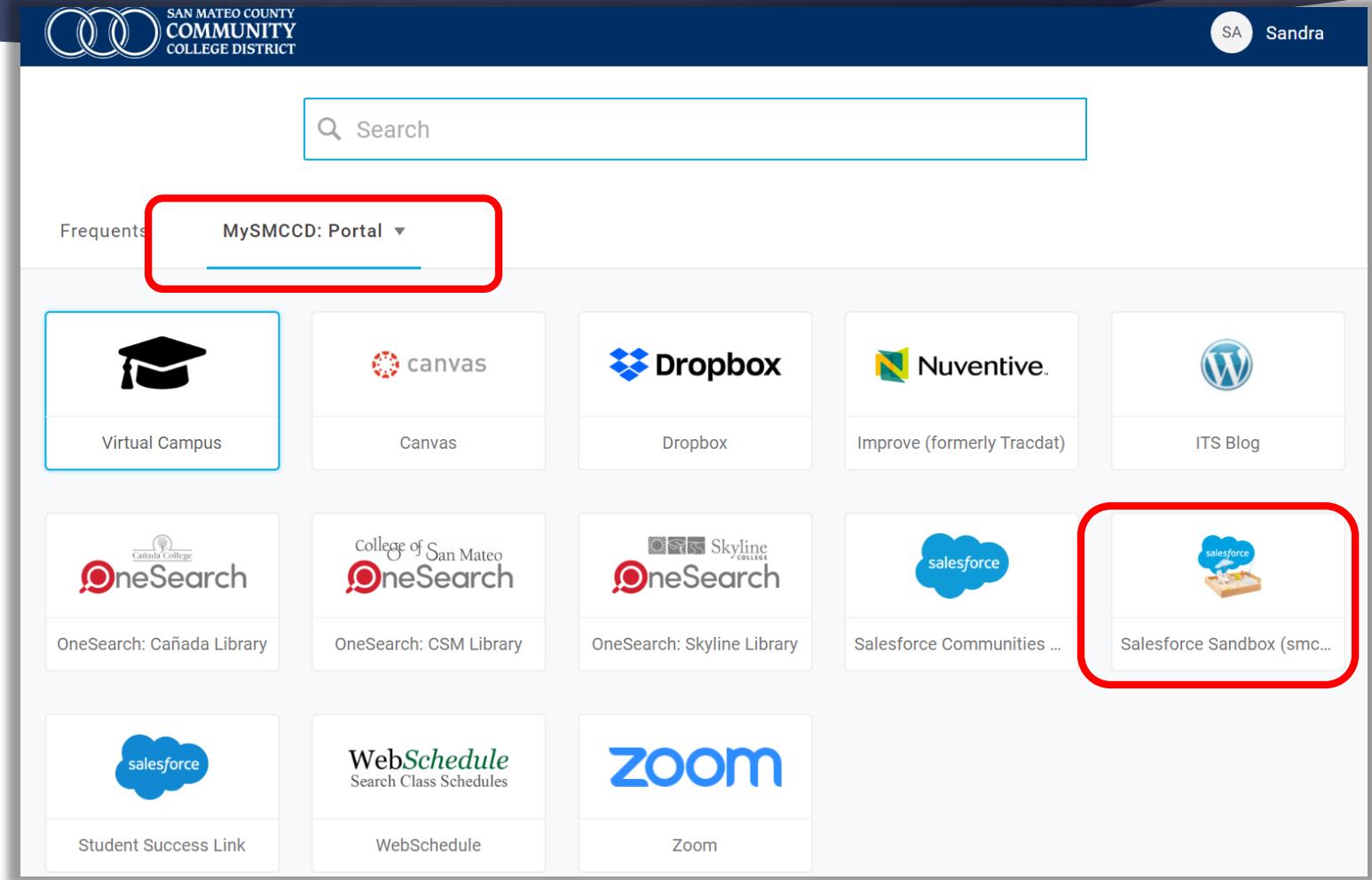
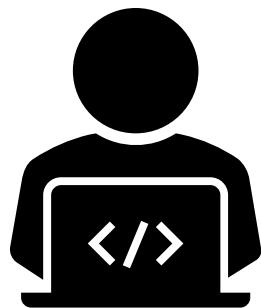
[Forgot Username / Report](#)

[Forgot Password](#)

# Activity #1: Log into SSO and Salesforce Sandbox

Review your Activity Guide for instructions (pg 1)

Questions? Ask Sandy and Steven!



The screenshot shows the SMCCD SSO portal with the following layout and links:

- Header:** SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT logo and a user profile for SA Sandra.
- Search Bar:** A search input field with a magnifying glass icon.
- MySMCCD: Portal:** A dropdown menu currently selected, indicated by a red box.
- Grid of Frequent Links:** A 4x3 grid of links, with the last cell in the bottom right row highlighted by a red box.
  - Row 1:** Virtual Campus (highlighted by a red box), canvas, Dropbox.
  - Row 2:** OneSearch: Cañada Library, OneSearch: CSM Library, OneSearch: Skyline Library.
  - Row 3:** Student Success Link, WebSchedule, Zoom.
  - Row 4 (highlighted):** Salesforce Communities ..., Salesforce Sandbox (smc...).

# Navigation: Initial Login

The screenshot shows the Salesforce Home page with several key components highlighted:

- Global Search:** A search bar at the top right with a magnifying glass icon and the placeholder "Search Salesforce".
- User Profile:** A circular profile picture of a person in the top right corner.
- Navigation List:** A sidebar on the left with a "Home" button and a "Sort by" dropdown set to "Most Recent Activity".
- Additional Links:** A sidebar on the right containing links to "International Portal", "Cañada RFI Page", "Skyline RFI Page", "CSM RFI Page", and "Event Listing" for various campuses.
- Appointment Manager:** A section at the bottom with a "View All" button and a note: "Nothing due today. Be a go-getter, and check back soon."
- Page Footer:** A footer bar at the bottom with buttons for "Appointment Manager" and "Notes".

Red arrows and labels point to the following specific areas:

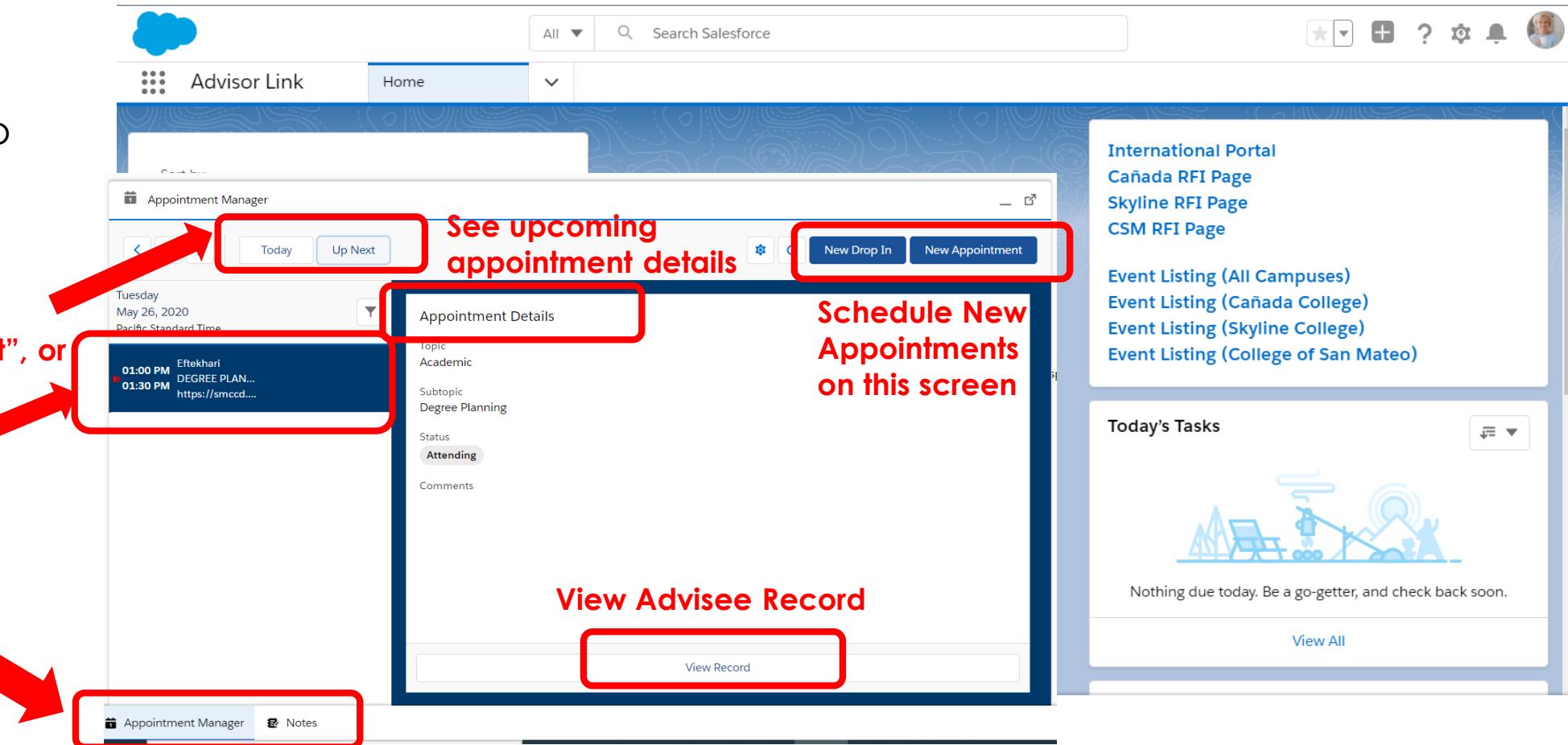
- A red box and arrow point to the "Home" button in the Navigation List.
- A red box and arrow point to the Global Search bar.
- A red box and arrow point to the User Profile picture.
- A red arrow points to the "Event Listing" section in the Additional Links sidebar.
- A red arrow points to the "Appointment Manager" section at the bottom.
- A red box and arrow point to the "Notes" button in the Page Footer.

# Navigation: Appointment Manager

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

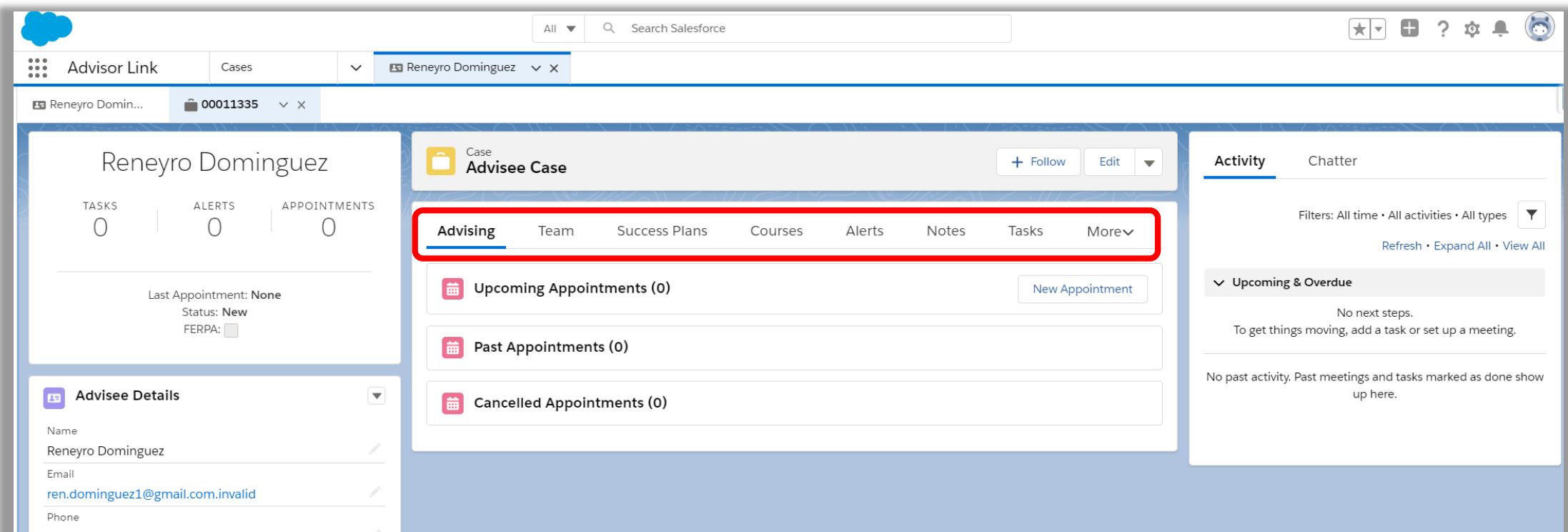
Click Up "Up Next", or "Today" to see upcoming Appointments

Click Appointment Manager to expand window



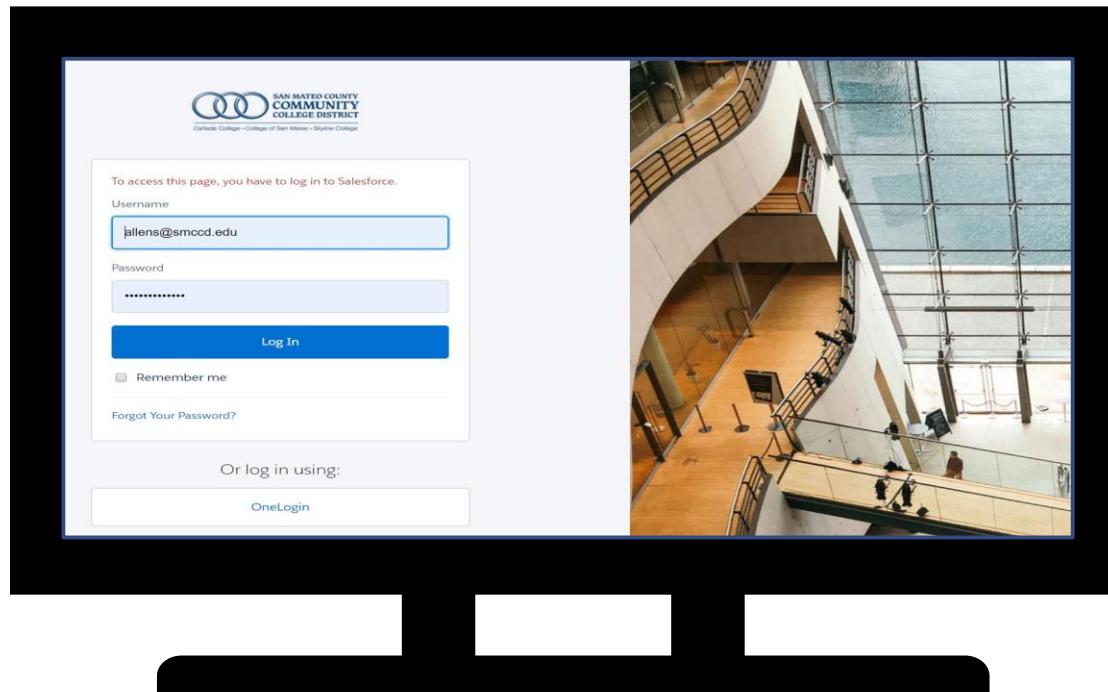
# Navigation: Student Case Record

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

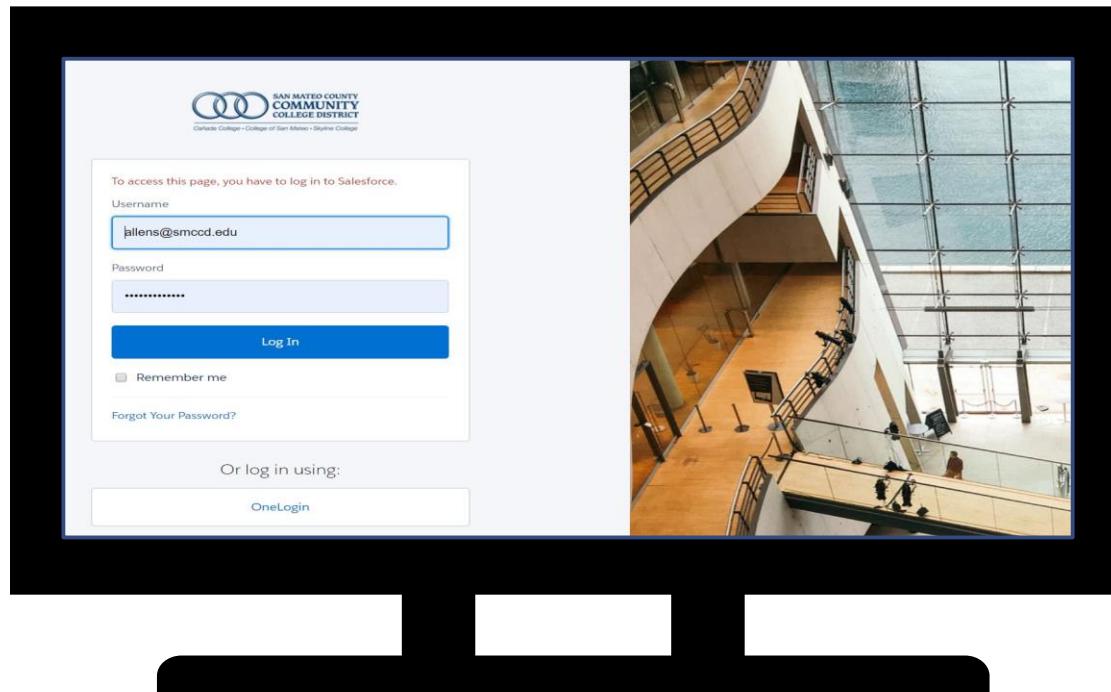


The screenshot shows the Salesforce interface for a student case record. The top navigation bar includes the Salesforce logo, 'All' dropdown, 'Search Salesforce' bar, and various user icons. The main header displays 'Case' and 'Advisee Case' with a 'Follow' and 'Edit' button. The left sidebar shows 'Adviser Link' and 'Cases' for 'Reneyro Dominguez'. The main content area displays 'Reneyro Dominguez' details: Tasks (0), Alerts (0), Appointments (0), and a note about the last appointment being 'None' with status 'New' and FERPA status. The 'Advising' tab is selected in the navigation bar, which is highlighted with a red box. Below it, there are sections for 'Upcoming Appointments (0)', 'Past Appointments (0)', and 'Cancelled Appointments (0)'. The 'Upcoming Appointments' section includes a 'New Appointment' button. The right sidebar shows the 'Activity' tab selected, with a note about no past activity and a section for 'Upcoming & Overdue' with a note about adding tasks or meetings. The 'Chatter' tab is also present.

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



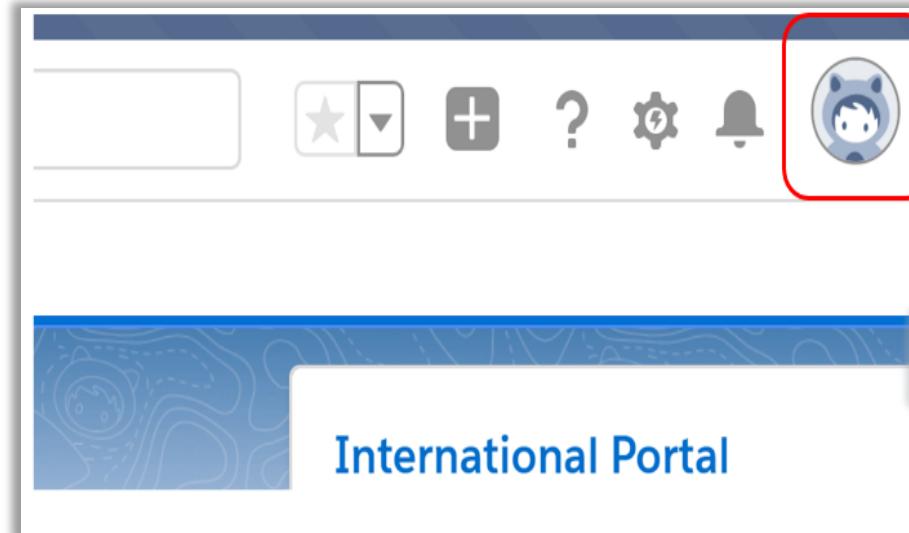
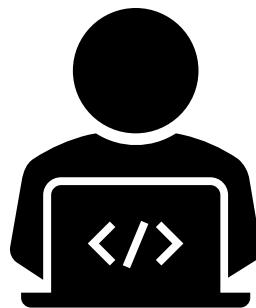
# Demo: Pin “My Advisee View”, Add a Picture, Update Profile Info



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

Review your Activity Guide for instructions (pg 2)

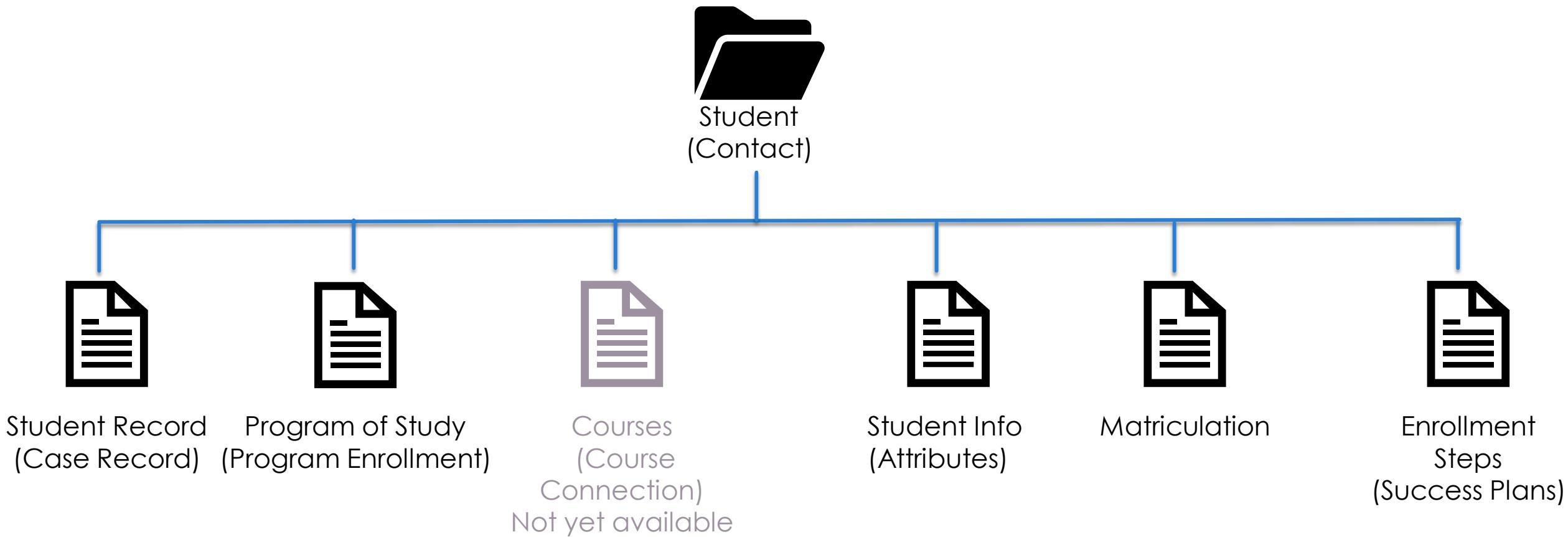
Questions? Ask Sandy and Steven!



# Types of Records



# Object Types: Contact Object



# Student Contact Example

The screenshot shows a Salesforce Contact object page with several annotations:

- Object**: A red arrow points to the "Contact" icon and the "First Name, Last Name" input field.
- Related**: A red box encloses the "Related List Quick Links" section, which includes links to Cases, Program Enrollments, Course Connections, Attributes, Matriculations, Success Plans, Affiliated Accounts, Relationships, Addresses, Contact Languages, Campaign History, and Notes & Attachments.
- Student Details**: A red box encloses the "Details" tab and the "Contact Details" section, which includes fields for Name, Account Name, Chosen Full Name, DOB, Social Security Number, Citizenship, and Dual Citizenship.

Key visible data on the page:

- Contact**: First Name, Last Name: Dominguez Administrative Account
- Email**: Email
- Contact Owner**: 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)
- Details**: Contact Details, Name: First Name, Last Name, Account Name: Dominguez Administrative Account, Chosen Full Name, DOB, Social Security Number, Citizenship, Dual Citizenship
- Activity**: (not visible in the screenshot)

# 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](#)

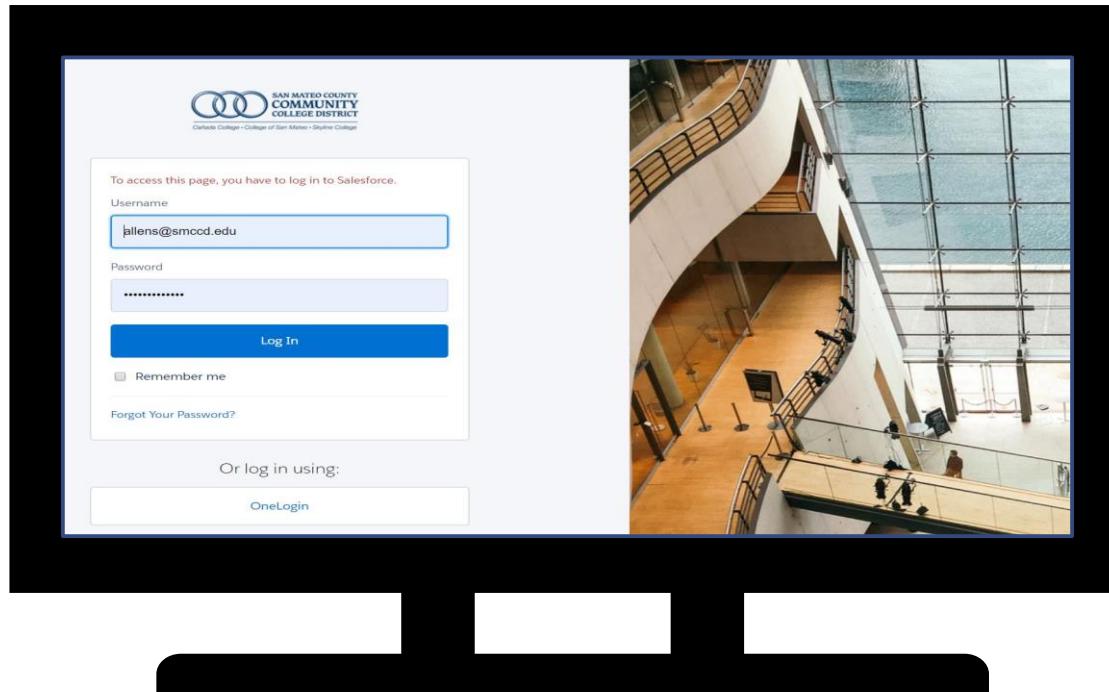
[WebSmart Counseling and Advisor Services](#)

[Banner Document Management](#)

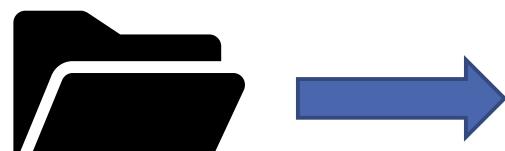
# Where to Find Data

Student Success Link Record	Key Data Metrics			
Student Contact	<ul style="list-style-type: none"><li>• GID</li><li>• Birthday</li></ul>	<ul style="list-style-type: none"><li>• Mailing Address</li><li>• Deep Links</li></ul>		<ul style="list-style-type: none"><li>• Preferred first name</li><li>• Personal pronoun</li></ul>
Student Case	<ul style="list-style-type: none"><li>• Counseling Apts</li><li>• Courses</li></ul>	<ul style="list-style-type: none"><li>• Counseling/Enrollment Team</li></ul>		<ul style="list-style-type: none"><li>• Notes</li><li>• Tasks</li></ul>
Program Enrollment	<ul style="list-style-type: none"><li>• Program of Study</li></ul>			
Course Connections	<ul style="list-style-type: none"><li>• Courses the student is enrolled in</li></ul>			
Attributes	<ul style="list-style-type: none"><li>• Student Type</li><li>• Foster Youth</li></ul>	<ul style="list-style-type: none"><li>• CalWorks</li><li>• CARE</li></ul>		<ul style="list-style-type: none"><li>• EOPS</li><li>• Promise</li></ul>
Matriculation	<ul style="list-style-type: none"><li>• Counseling Status</li><li>• Orientation Status</li></ul>	<ul style="list-style-type: none"><li>• Ed Plan Status</li><li>• Assessment Status</li></ul>		<ul style="list-style-type: none"><li>• MyMajors Info</li></ul>
Enrollment Steps	<ul style="list-style-type: none"><li>• Enrollment Steps</li></ul>			

# 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

The screenshot shows a Salesforce interface for a student case. The top navigation bar includes a blue cloud icon, 'Adviser Link', a search bar, and various system icons. The main title is 'Case' and 'Advisee Case'.

**Student Record:** A red arrow points to the '00011335' ID in the top navigation bar. A red circle highlights the 'Reneyro Dominguez' name in the top center.

**Student Contact Record:** A red arrow points to the 'Reneyro Dominguez' name in the left sidebar.

**Student Tab:** A red circle highlights the 'Student' tab in the top navigation bar.

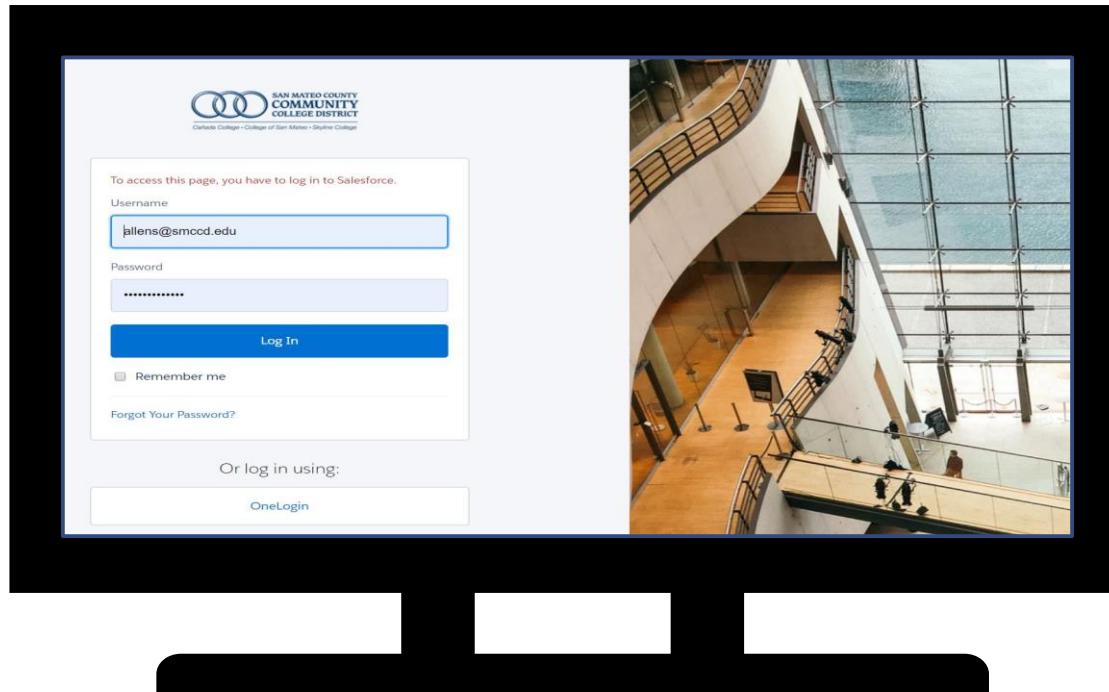
**Related Lists:** A red circle highlights the 'Related Lists' section, which contains 'Upcoming Appointments (0)', 'Past Appointments (0)', and 'Cancelled Appointments (0)'.

**Activity:** The 'Activity' tab is selected, showing 'Upcoming & Overdue' activity with a note: 'No next steps. To get things moving, add a task or set up a meeting.'

**Chatter:** The 'Chatter' tab is shown with a note: 'No past activity. Past meetings and tasks marked as done show up here.'

**Advisee Details:** The left sidebar shows 'Advisee Details' with fields for Name (Reneyro Dominguez), Email (ren.dominguez1@gmail.com.invalid), and Phone.

# Case Record Demo

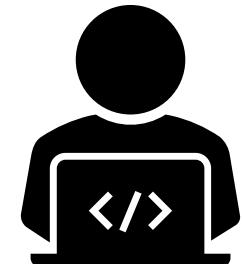


# Activity#3 Find Your Student Case

Review your  
Activity Guide for  
instructions (pg 4)

Questions? Ask  
Sandy and Steven

Click the Red X if  
you need help!



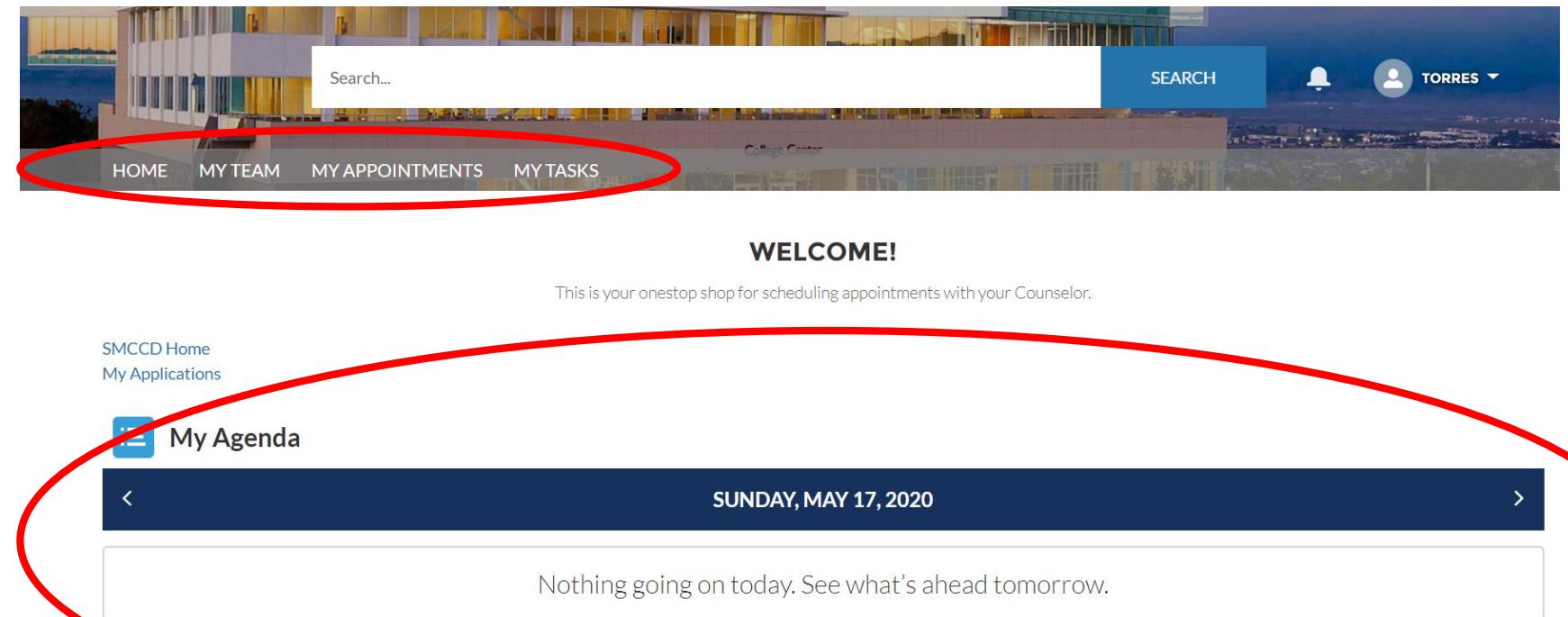
The screenshot shows a student case management system interface. The top navigation bar includes tabs for 'Gustavo Escoria', '00029234', 'Cases', and 'Case Advisee Case'. The main dashboard for 'Gustavo Escoria' displays 0 tasks, 0 alerts, and 1 appointment. The last appointment is listed as 'May 17, 2020' with status 'New' and FERPA status 'FERPA'. A sidebar titled 'Advisee Details' shows the name 'Gustavo Escoria', email 'escorciagustavo99@gmail.com.sample', and an empty phone field. The 'Case Advisee Case' tab is active, showing sections for 'Upcoming Appointments' (1), 'Past Appointments' (2), and 'Cancelled Appointments' (0). The 'Upcoming Appointments' table includes columns for TOPIC, SUBTOPIC, OWNER, STATUS, and DATE. One appointment is listed: 'Academic' (Degree Planning) by 'Mary Valenti' on '5/20/2020, 9:00 AM'. The 'Past Appointments' table includes columns for TOPIC, SUBTOPIC, OWNER, STATUS, and DATE. Two past appointments are listed: 'Academic' (Dismissal/Reinstatement) by 'Arielle Smith' on '5/17/2020, 7:23 PM' (No Show) and 'Academic' (Degree Planning) by 'Arielle Smith' on '5/17/2020, 6:35 PM' (Attended). The 'Cancelled Appointments' section shows 0 entries.

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

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

# 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.

## First Pass Success Team Members



Success  
Navigator



Residency  
Specialist



Financial  
Aid



General  
Counseling Pool



"General  
Counselor"  
clicks Assign  
Success Team  
Button



DRC  
Counselor



Promise  
Counselor



ESL  
Counselor



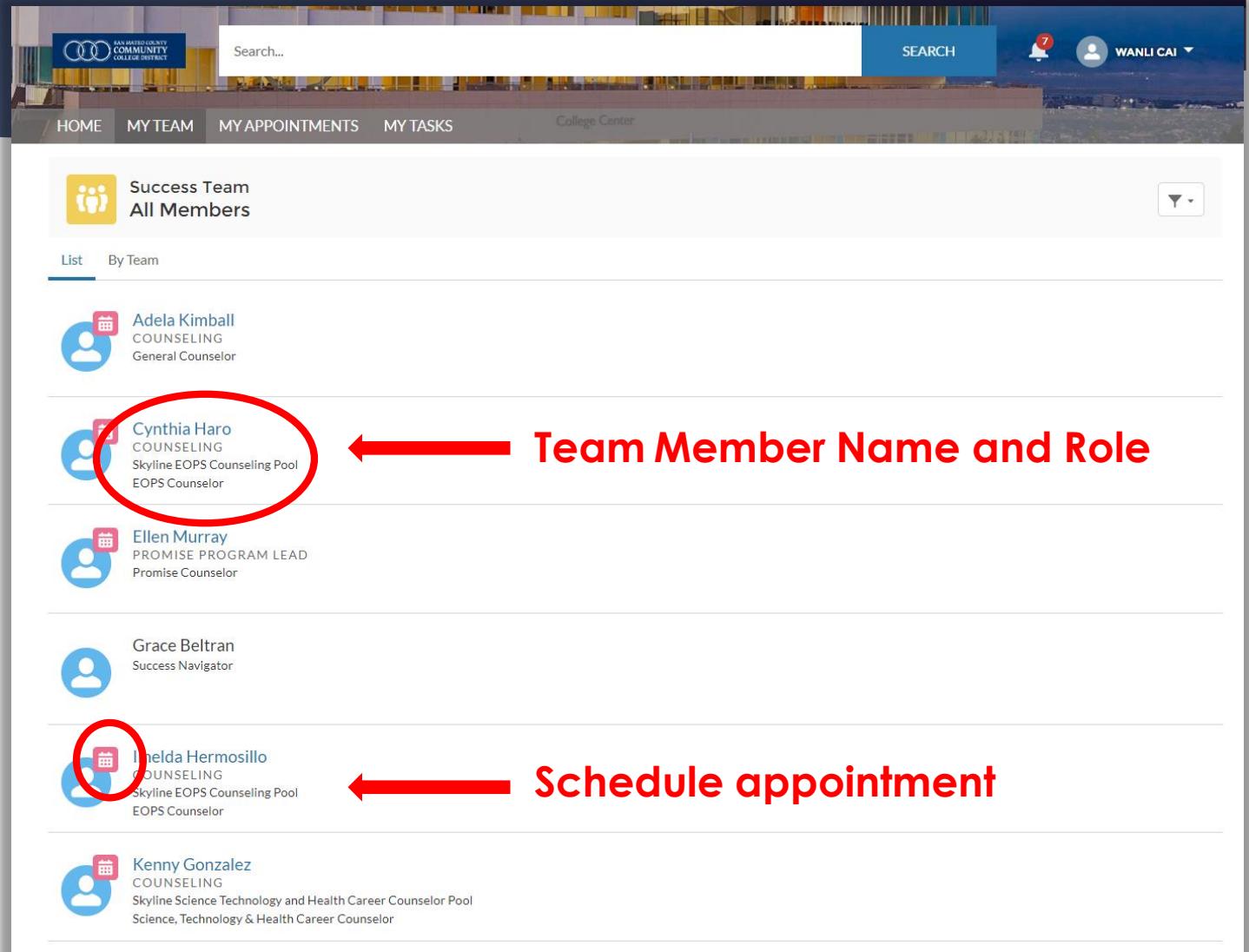
Transfer  
Counseling Pool

## Additional Individual Team Members Assigned

EOPS  
Counseling Pool

# Student Portal: My Team

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

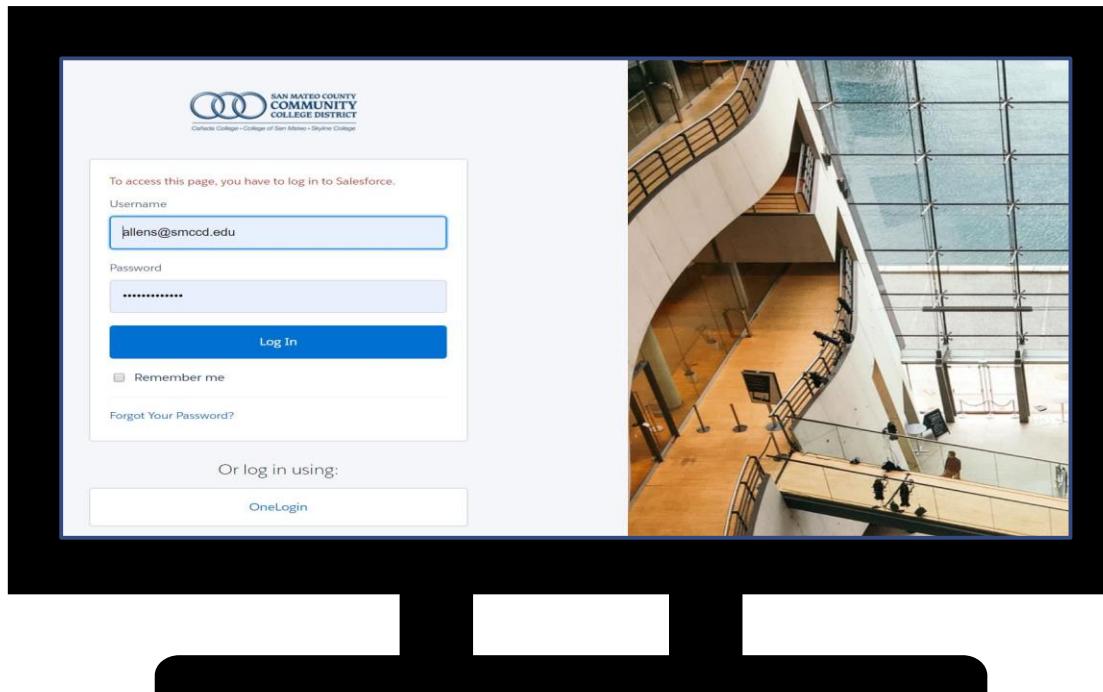


The screenshot shows the 'My Team' section of the Student Portal. At the top, there is a navigation bar with 'HOME', 'MY TEAM' (which is the active tab), 'MY APPOINTMENTS', 'MY TASKS', and 'College Center'. A search bar and a user profile for 'WANLI CAI' are also present. The main content area is titled 'Success Team All Members' and lists five team members:

- Adela Kimball (Counseling, General Counselor)
- Cynthia Haro (Counseling, Skyline EOPS Counseling Pool, EOPS Counselor) - This entry is circled in red, with a red arrow pointing to the right labeled 'Team Member Name and Role'.
- Ellen Murray (PROMISE PROGRAM LEAD, Promise Counselor)
- Grace Beltran (Success Navigator)
- Imelda Hermosillo (Counseling, Skyline EOPS Counseling Pool, EOPS Counselor) - This entry is circled in red, with a red arrow pointing to the right labeled 'Schedule appointment'.
- Kenny Gonzalez (Counseling, Skyline Science Technology and Health Career Counselor Pool, Science, Technology & Health Career Counselor)

Each team member is represented by a blue profile icon with a pink calendar icon indicating appointment availability.

# Success Team Assignment 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

The image displays three separate screenshots of the Salesforce interface, each showing a list of tasks under a 'Success Plan Template' for a specific college's enrollment steps. Each screenshot includes a header with the college name and a table with columns for 'Subject' and 'Priority'.

**Skyline Enrollment Steps**

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

**CSM Enrollment Steps**

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

**Cañada Enrollment Steps**

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 image shows a screenshot of the Success Plans interface. It is a multi-step process:

- 1. Navigate to the Case Record:** The first step is shown in a screenshot of the 'Case' tab in the 'Advisor Link' application. A red arrow points to the 'Cases' tab in the top navigation bar, and another red arrow points to the '00036381' case record.
- 2. Click Success Plans:** The second step is shown in a screenshot of the 'Success Plans' tab. A red arrow points to the 'Success Plans' tab in the top navigation bar, which is highlighted in blue.
- 3. Review Tasks:** The third step is shown in a screenshot of the 'Success Plan' details page for 'Skyline Enrollment Steps'. A red arrow points to the 'Open Activities (5)' section, which lists five tasks: 'Sign Up for Financial Aid', 'Complete Orientation', 'Complete Assessment', 'Attend Counseling Appointment', and 'Pay Fees'. One of these tasks, 'Sign Up for Financial Aid', is circled in red.

The interface includes various sections such as 'Case Advisee Case', 'Advisee Details', 'Open Success Plans (1)', 'Closed Success Plans (0)', and 'Activity History (2)'. The 'Success Plans' tab is currently active, showing a list of open tasks for the specified case.

# 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

**COUNSELING**

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](#)

**Meet Your Success Navigator**

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  
[Unsubscribe](#)

**RESIDENCY**

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!  
> 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.

HOME MY TEAM MY APPOINTMENTS **MY TASKS** College Center

Search... SEARCH WANLI CAI ▾

TODAY IS TUESDAY, MAY 5, 2020

▼ This Week (4) 05/07/2020

**Complete Orientation** >  
Priority: High  
Status: Not Started  
Success Plan: Skyline Enrollment Steps

**Sign Up for Financial Aid** >  
Priority: High  
Status: Not Started  
Success Plan: Skyline Enrollment Steps

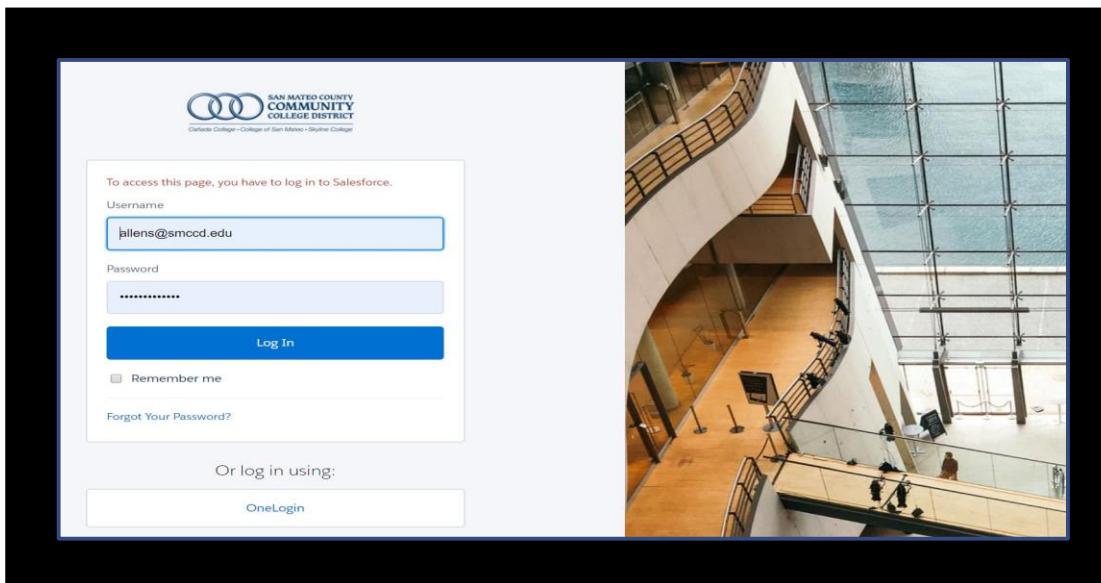
**Complete MyMajors** >  
Priority: Normal  
Status: Not Started  
Success Plan: Skyline Enrollment Steps

**Complete Assessment** >  
Priority: Normal  
Status: Not Started  
Success Plan: Skyline Enrollment Steps

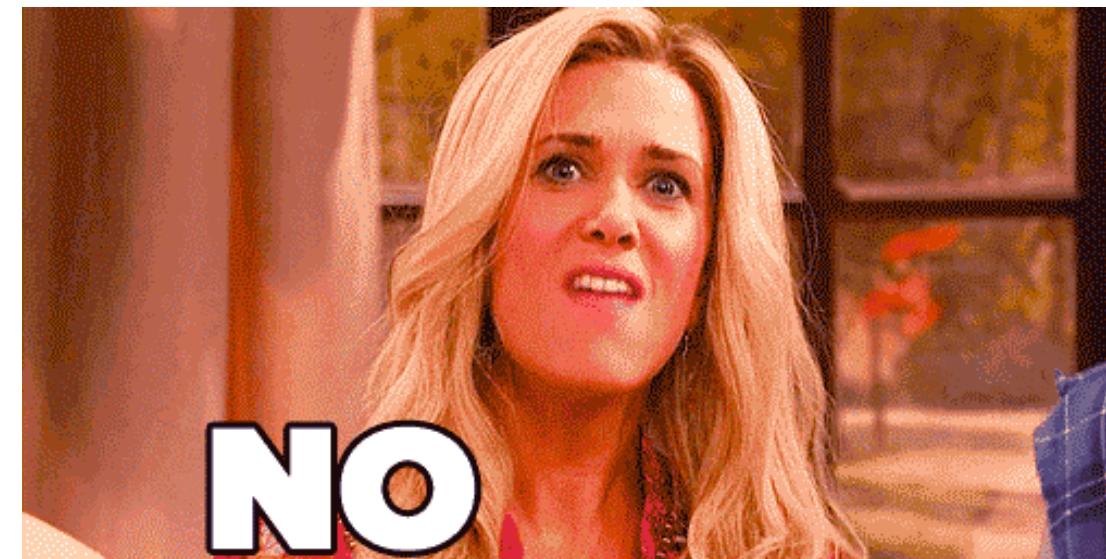
> This Month (1)

> No Due Date (2)

# Success Plan Demo



# POP QUIZ #2!



# 5 Minute Break

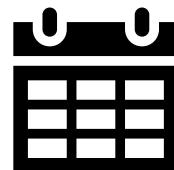


# About Appointments



# 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

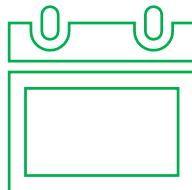
### Health

- 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

The screenshot shows the Salesforce interface for an advisor. The top navigation bar includes 'All', 'Search Salesforce', 'Cases', and a search for 'Gustavo Escoria'. The main view for 'Gustavo Escoria' (Case #00029234) shows 0 tasks, 0 alerts, and 1 appointment. The 'Advising' tab is selected. Below this, the 'Appointment Manager' is open. A red arrow points from the text '1. Click the Appointment Manager' to the 'Appointment Manager' button at the bottom left of the manager's interface. Another red circle highlights the 'New Drop In' button within the 'Appointment Manager' interface. The 'Appointment Details' section shows an appointment for 'Heather Peviani' on May 25, 2020, at 9:00 AM, marked as 'Attending'.

1. Click the Appointment Manager

2. Click "New Drop In"

Appointment Manager

Case Gustavo Escoria

Advising

New Drop In

New Appointment

Heather Peviani

May 25, 2020

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

Action

# Schedule a Drop In Appointment

3. Search Advisee in “Invitee”

5. Select topic and subtopic

6. Select drop in duration

7. Click Save and Appointment is created

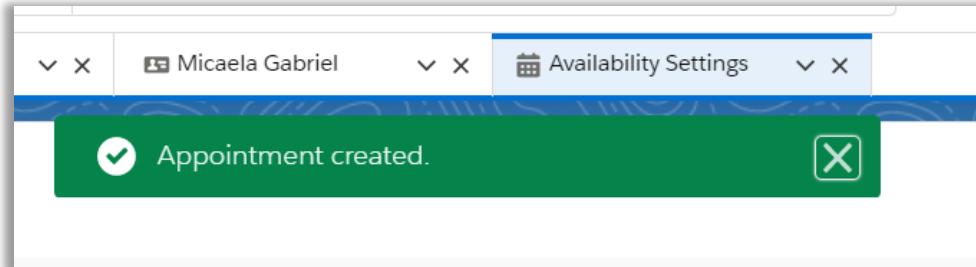
**4. Select Location**

**3. Search Advisee in “Invitee”**

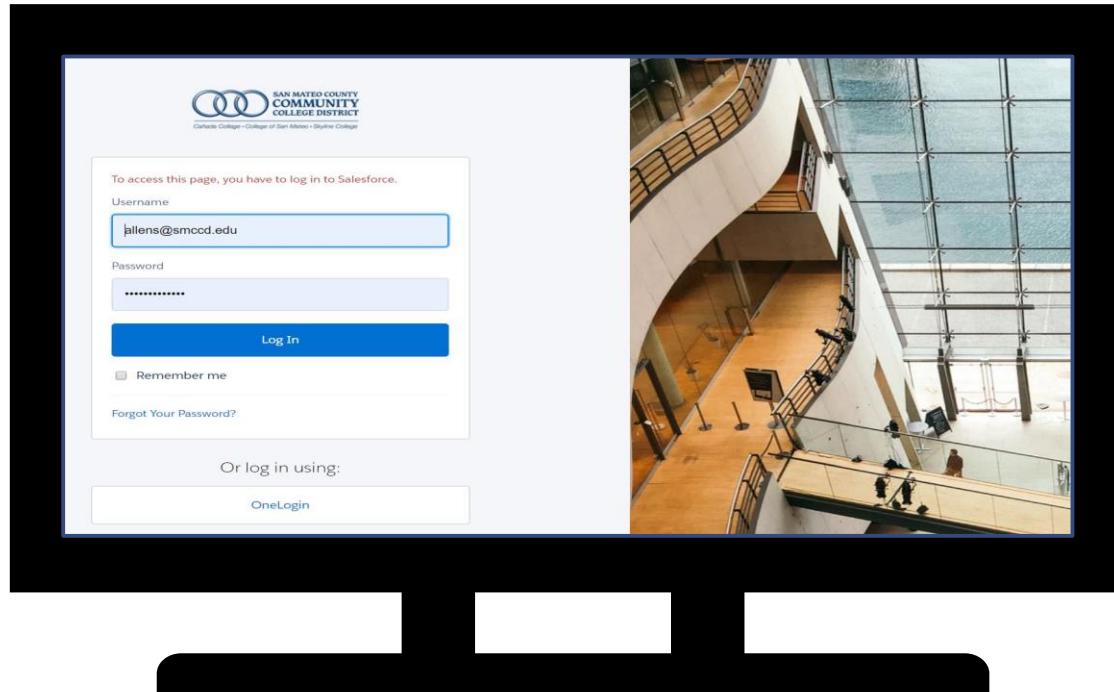
**5. Select topic and subtopic**

**6. Select drop in duration**

**7. Click Save and Appointment is created**



# Demo Drop In Appointment



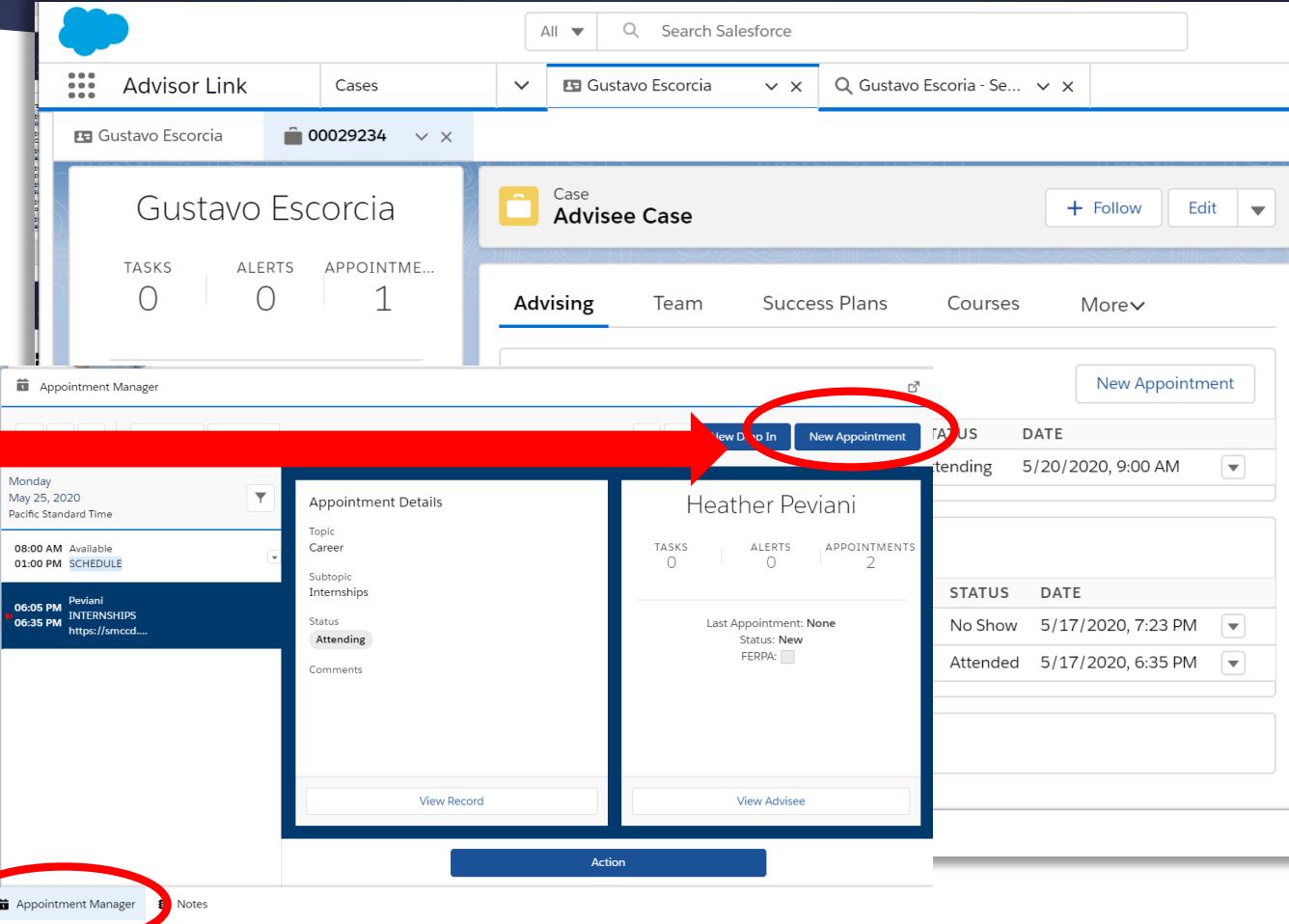


# Third Party Scheduling Appointments

# 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



The screenshot shows the Salesforce interface with the following details:

- Header:** Advisor Link, Cases, Gustavo Escoria, Gustavo Escoria - Se...
- Case Record:** Gustavo Escoria (Case Number: 00029234). The Case tab is selected, showing the "Advisee Case" section with tabs for Advising, Team, Success Plans, Courses, and More.
- Appointment Manager:** The "Appointment Manager" tab is selected. It shows the following information:
  - Calendar:** Monday, May 25, 2020, Pacific Standard Time. Available time: 08:00 AM - 01:00 PM; SCHEDULE time: 06:05 PM - 06:35 PM.
  - Appointment Details:** Topic: Career, Subtopic: Internships, Status: Attending.
  - Appointment Record:** For Heather Peviani, dated 5/20/2020 at 9:00 AM, Status: Attending.
  - History:** Last Appointment: None, Status: New, FERPA: [checkbox]. Previous entries for 5/17/2020 show "No Show" at 7:23 PM and "Attended" at 6:35 PM.

**Annotations:**

- 1. Click the Appointment Manager** (Red circle around the "Appointment Manager" tab in the bottom left corner of the main content area).
- 2. Click "New Appointment"** (Red arrow pointing to the "New Appointment" button in the top right corner of the Appointment Manager section).

# Third Party Scheduling

## 3. Select Advising Event

New Appointment

Select a record type for this Appointment.

Non-Advising Event

Advising Event

Advising Time

## 4. Complete the Basics

New Appointment

Basics

4a)   
Mary Valenti

4b)   
Hanna Wai

4c)   
https://smccd.zoom.us/j/6822537626  
 Web Meeting

Agenda

4d)   
Academic

4e)   
Degree Planning

Description

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

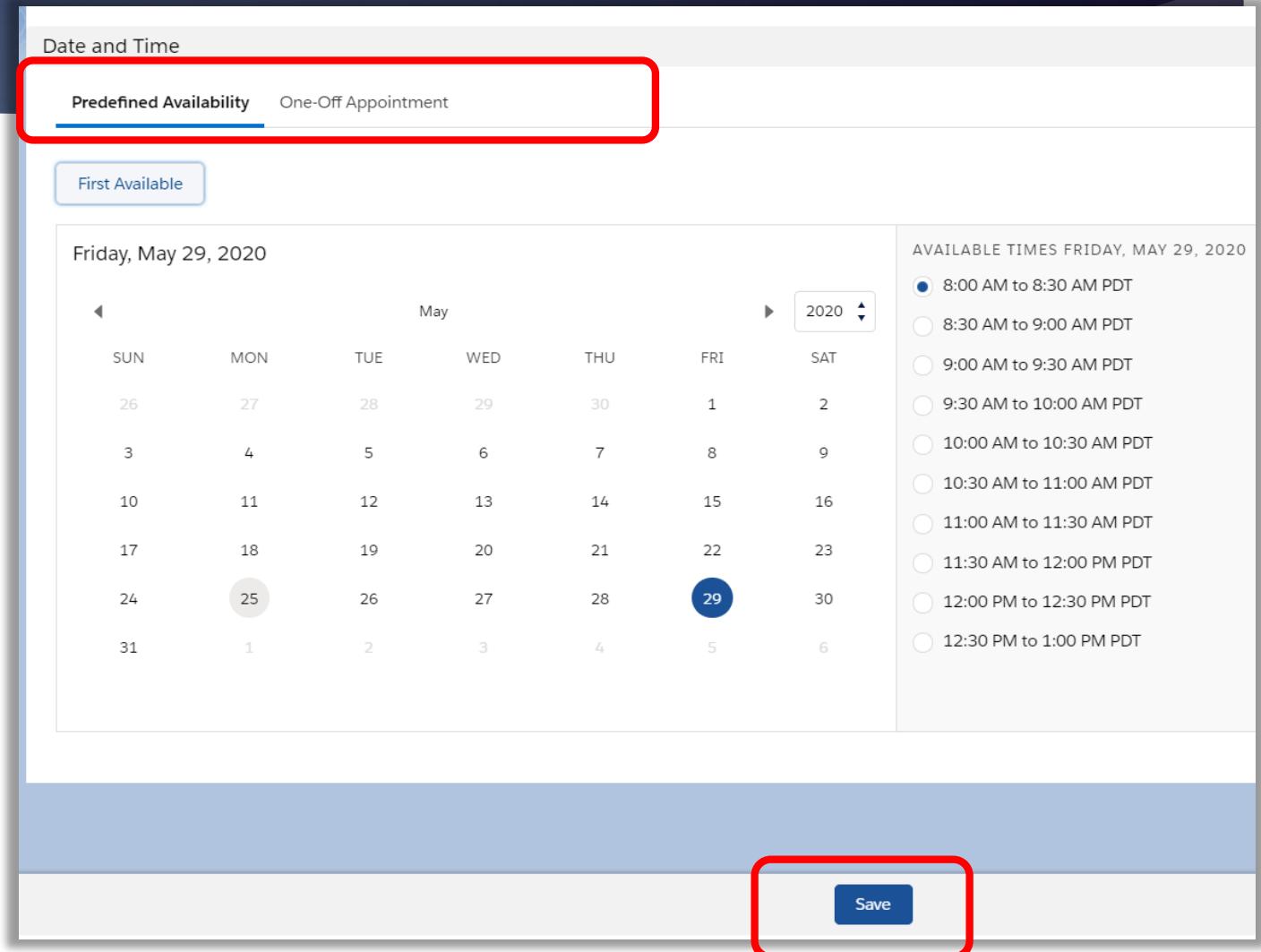
# Third Party Scheduling

## 4) Select Predefined Availability or One-Off Appointment

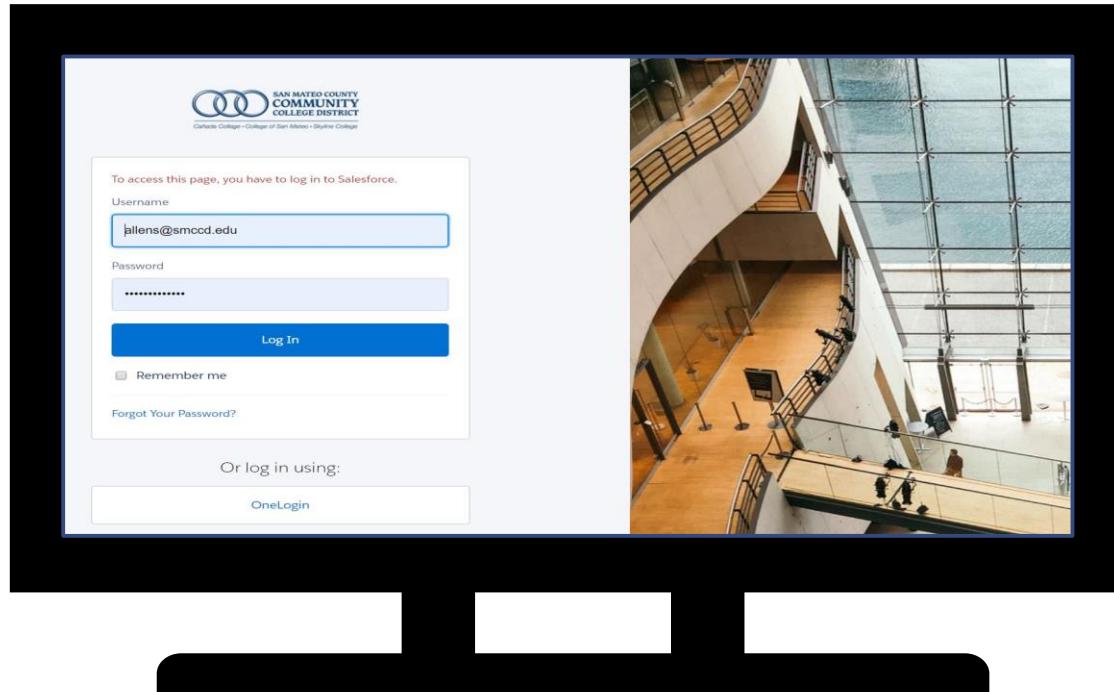
If you select Predefined Availability, you can select “First Available” to see upcoming times available

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

## 5) Click Save



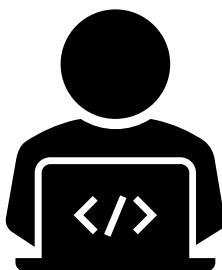
# Demo Third Party Scheduling



# 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

\* Invitee  
Search Advisees

\* Location  
-- Select One --  
 Web Meeting

**Agenda**

\* Topic  
-- Select One --

Description

Date and Time

Save



# Outlook Integration

# Outlook Integration

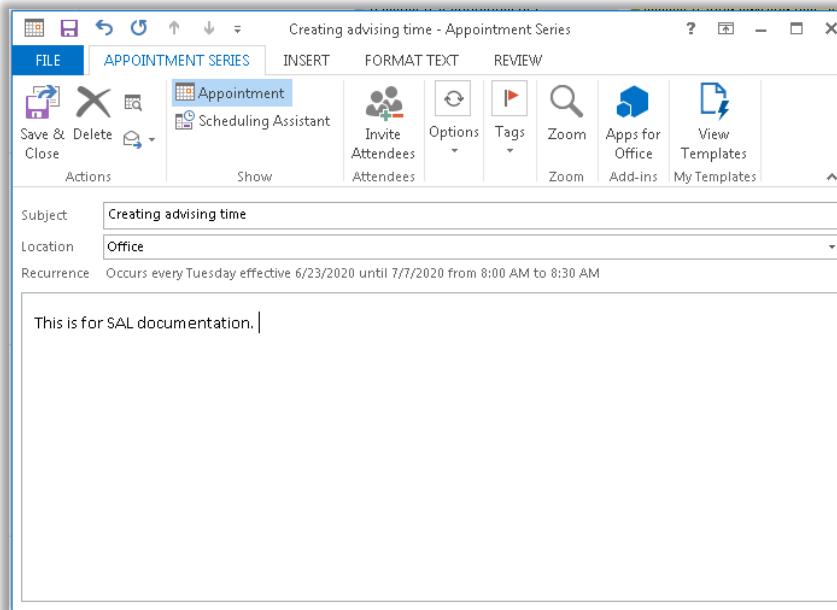
Riva is an Outlook Integration tool we are using to sync Student Success Link counseling appointments to Outlook.

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

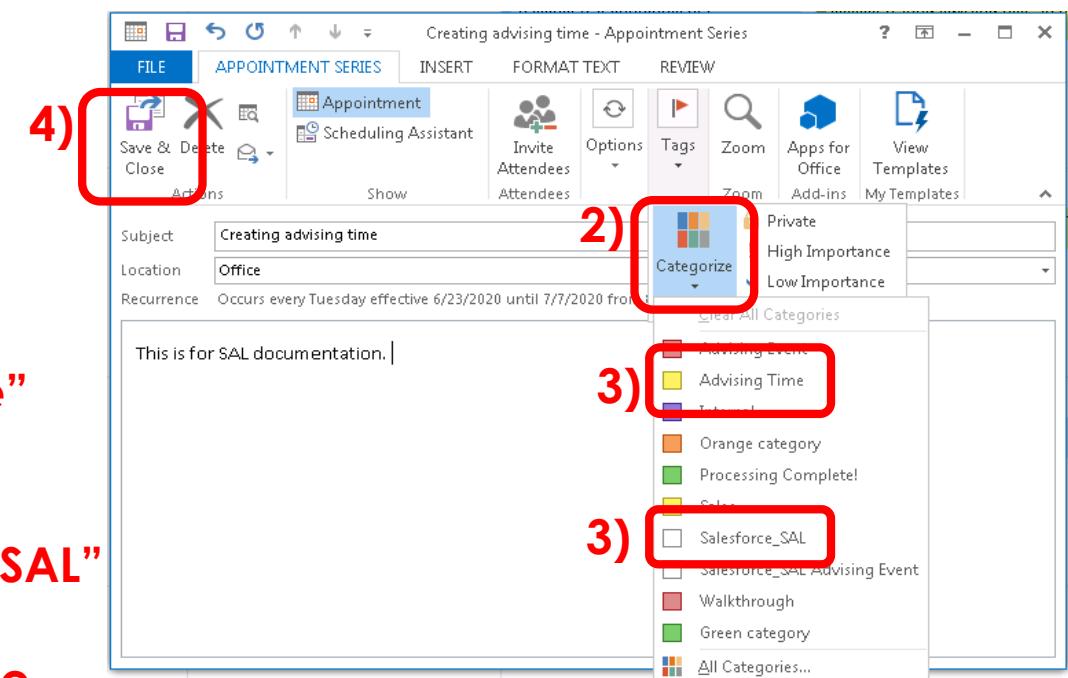
1) To create additional Counseling Time in Outlook, create a normal Outlook Appointment with the time you want to indicate as time available for counseling.



2) Click “Categorize”

3) Select “Advising Time” & “Salesforce\_SAL”

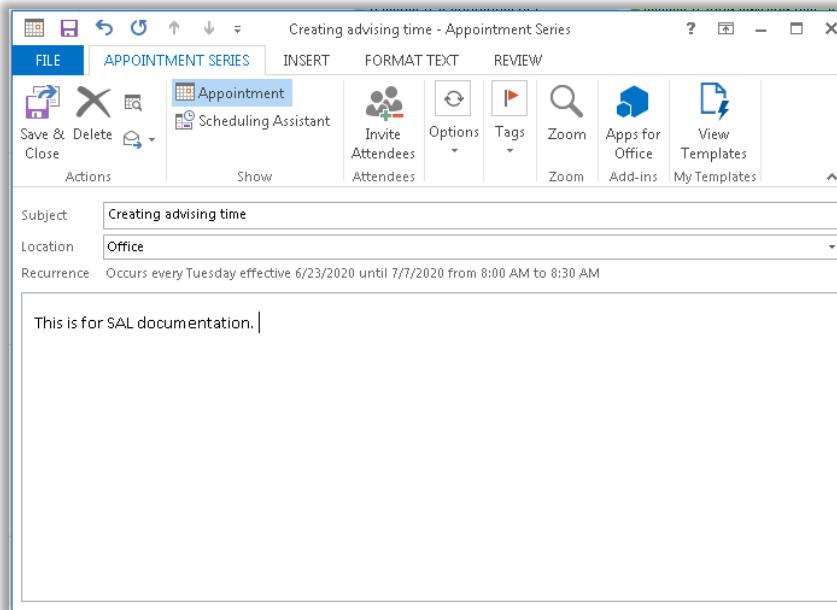
4) Click Save & Close



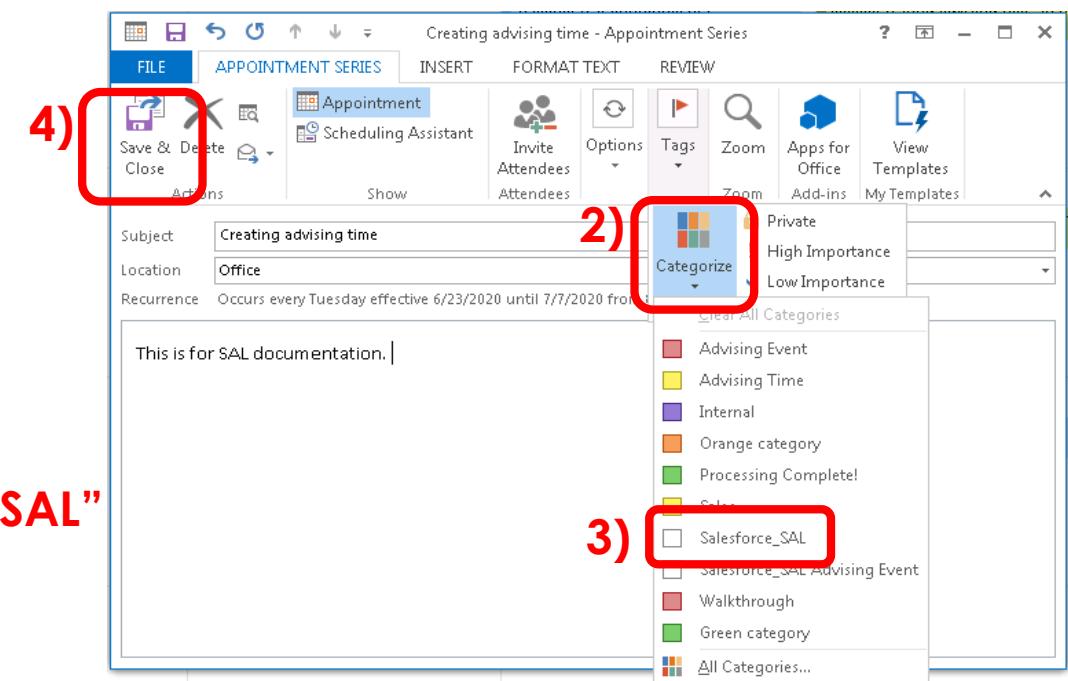
\*Note\* - If this is a recurring series make sure to disable “All day event”, or it won’t sync.

# 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)

The screenshot shows a Microsoft Outlook calendar interface for the week of June 14-20, 2020, in Washington, D.C. The calendar view is set to 'Week' mode. The days of the week are labeled: SUNDAY, MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, and SATURDAY. The time axis ranges from 7 AM to 12 PM.

**Yellow blocks (Counseling Availability):**

- Monday, June 15, 8:00 AM - 12:00 PM: A large yellow block labeled "Advising Time" is highlighted with a red box.
- Wednesday, June 17, 8:00 AM - 12:00 PM: A yellow block labeled "Advising Time" is highlighted with a red box.
- Wednesday, June 17, 12:00 PM - 1:00 PM: A yellow block labeled "non advising time" is highlighted with a red box.
- Thursday, June 18, 8:00 AM - 12:00 PM: A yellow block labeled "Advising Time" is highlighted with a red box.
- Thursday, June 18, 12:00 PM - 1:00 PM: A yellow block labeled "non advising time" is highlighted with a red box.
- Friday, June 19, 8:00 AM - 12:00 PM: A yellow block labeled "Advising Time" is highlighted with a red box.
- Friday, June 19, 12:00 PM - 1:00 PM: A yellow block labeled "non advising time" is highlighted with a red box.
- Saturday, June 20, 8:00 AM - 12:00 PM: A yellow block labeled "Advising Time" is highlighted with a red box.

**Green blocks (Non Counseling Events):**

- Monday, June 15, 12:00 PM - 1:00 PM: A green block labeled "[EXTERNAL] SMCCD & Apex" with the URL <https://zoom.us/j/6659953097> and participant "Levi Crandall".
- Wednesday, June 17, 12:00 PM - 1:00 PM: A green block labeled "SMCCD ar" with a small circular icon.
- Wednesday, June 17, 1:00 PM - 2:00 PM: A green block labeled "Academic - Degree Planning" with a small circular icon.

**Red blocks (Counseling Events):**

- Monday, June 15, 8:00 AM - 12:00 PM: A red block labeled "Advising Time".
- Wednesday, June 17, 8:00 AM - 12:00 PM: A red block labeled "Advising Time".
- Wednesday, June 17, 12:00 PM - 1:00 PM: A red block labeled "non advising time".
- Thursday, June 18, 8:00 AM - 12:00 PM: A red block labeled "Advising Time".
- Thursday, June 18, 12:00 PM - 1:00 PM: A red block labeled "non advising time".
- Friday, June 19, 8:00 AM - 12:00 PM: A red block labeled "Advising Time".
- Friday, June 19, 12:00 PM - 1:00 PM: A red block labeled "non advising time".
- Saturday, June 20, 8:00 AM - 12:00 PM: A red block labeled "Advising Time".

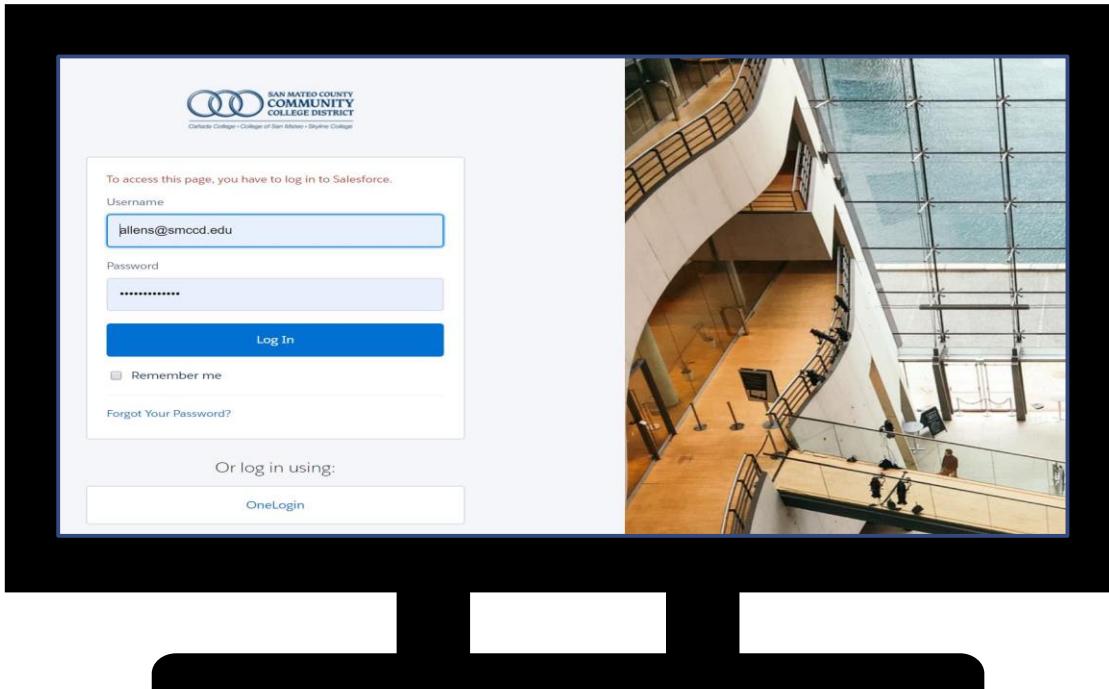
**Left Sidebar:**

- New Appointment
- New Meeting
- New Items
- New Skype Meeting
- New Teams Meeting
- Today
- Next 7 Days
- Day
- Work Week
- Week
- Month
- Schedule View
- Open Calendar
- Calendar Groups
- E-mail Calendar
- Share Calendar
- Or

**Bottom Sidebar:**

- My Calendars
- CRM
- International Program M...
- International
- Recruiters
- Deans of Counseling

# Demo Outlook Integration



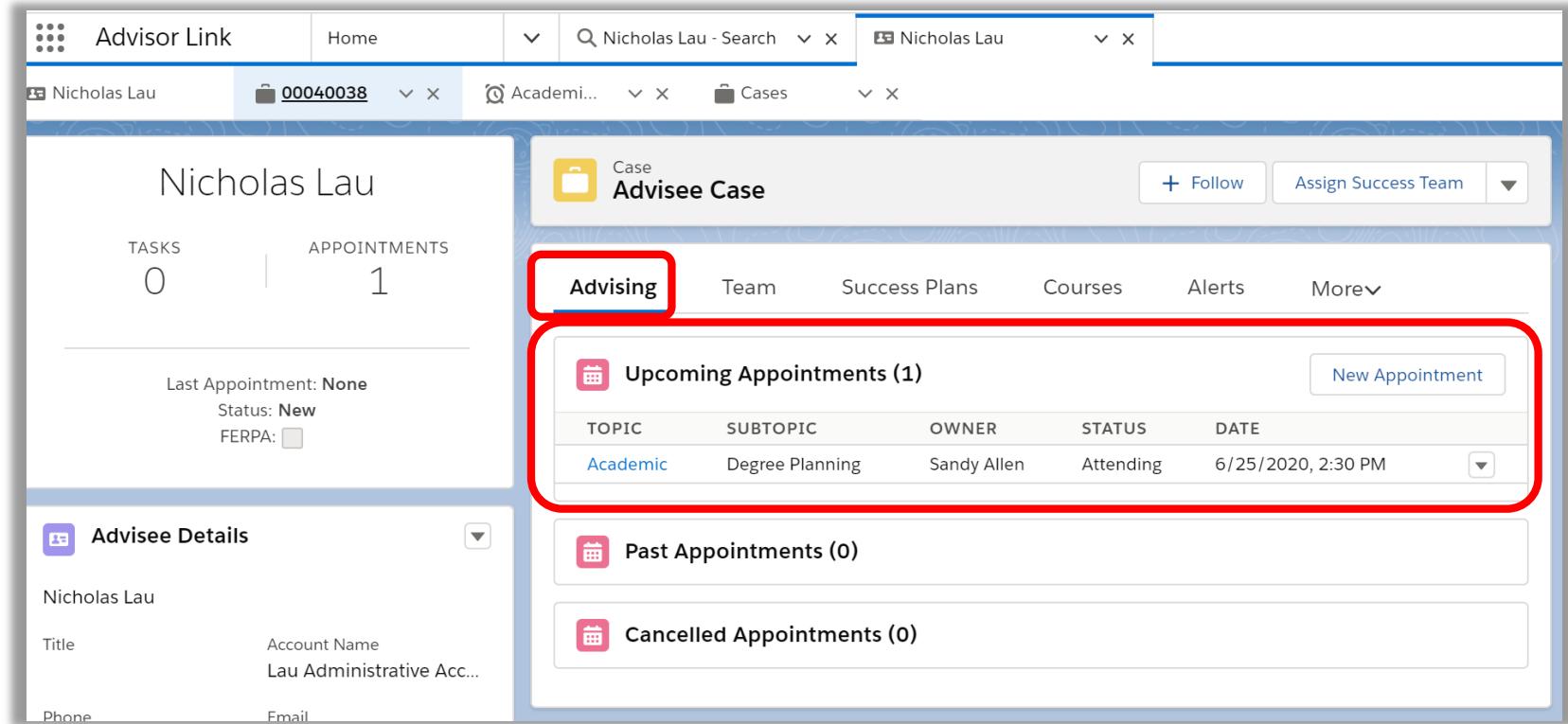
# Editing Appointments



# 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!



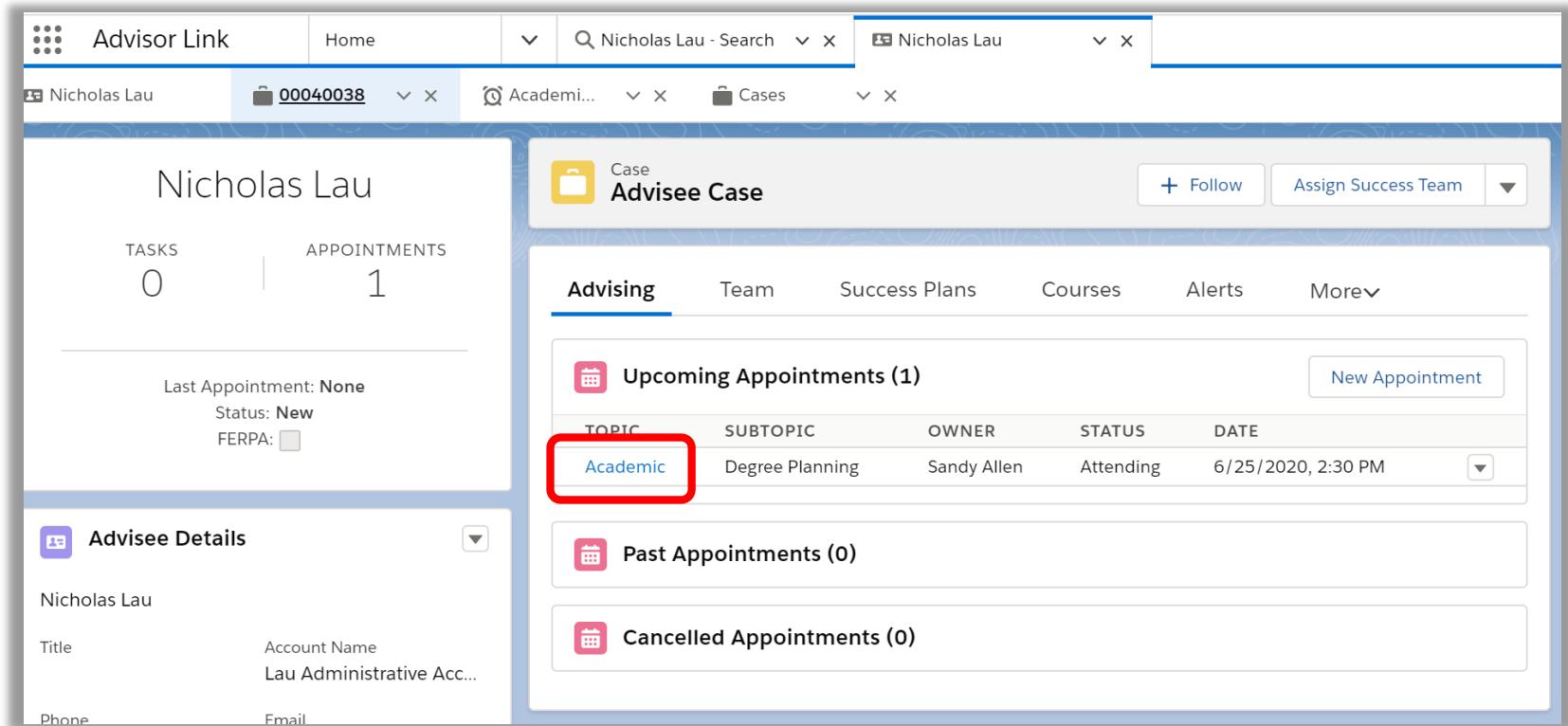
The screenshot shows the Advisor Link software interface. At the top, there is a navigation bar with tabs for 'Home', 'Search', 'Nicholas Lau', 'Cases', and 'Nicholas Lau'. Below the navigation bar, the main area displays 'Nicholas Lau' information, including 'TASKS 0', 'APPOINTMENTS 1', 'Last Appointment: None', 'Status: New', and 'FERPA:'. On the right side, there is a 'Case' section for 'Advisee Case' with tabs for 'Advising' (which is highlighted with a red box), 'Team', 'Success Plans', 'Courses', 'Alerts', and 'More'. The 'Advising' tab is currently active, showing the 'Upcoming Appointments (1)' section. This section contains a table with one row:

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

Below the 'Upcoming Appointments' section are 'Past Appointments (0)' and 'Cancelled Appointments (0)' sections.

# Editing Appointment

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

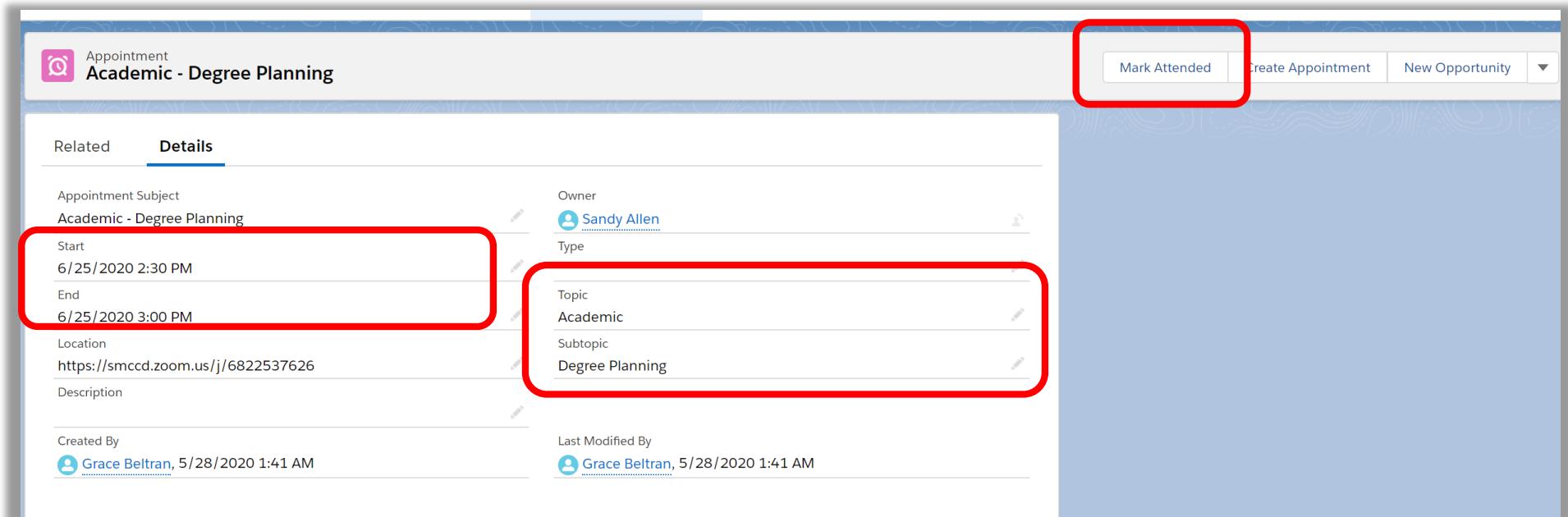


The screenshot shows the Advisor Link software interface. At the top, there is a navigation bar with tabs for Home, Search, Nicholas Lau, and other user profiles. Below the navigation bar, the main area displays the user profile for "Nicholas Lau" with 0 tasks and 1 appointment. The appointment details show "Last Appointment: None", "Status: New", and "FERPA: [checkbox]". To the right, the "Case Advisee Case" section is visible, featuring tabs for Advising, Team, Success Plans, Courses, Alerts, and More. The "Upcoming Appointments (1)" section is highlighted, showing a table with columns: TOPIC, SUBTOPIC, OWNER, STATUS, and DATE. The first appointment listed is "Academic" under "Degree Planning" by "Sandy Allen" with "Attending" status on "6/25/2020, 2:30 PM". A red box highlights the "Academic" topic in the appointment table. Below this, sections for "Past Appointments (0)" and "Cancelled Appointments (0)" are shown. On the left, a sidebar titled "Advisee Details" shows basic information for "Nicholas Lau" including Title, Account Name, Phone, and Email.

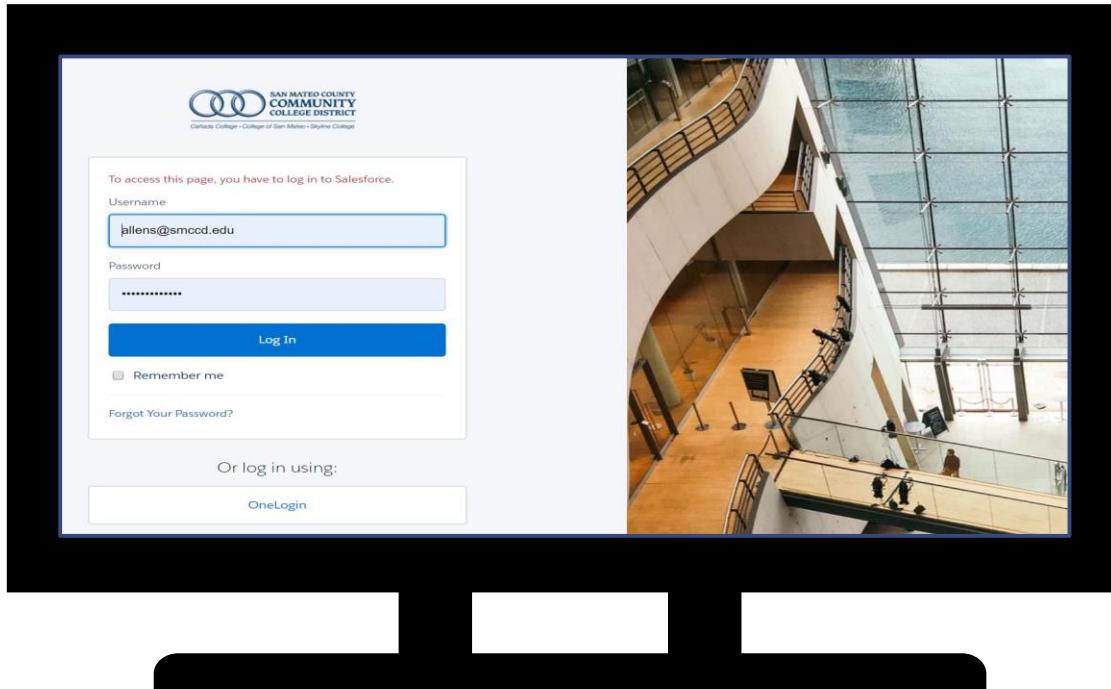
TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Academic	Degree Planning	Sandy Allen	Attending	6/25/2020, 2:30 PM

# Editing Appointment

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



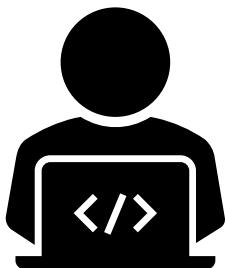
# Demo Editing Appointments



# Activity#5 Update Appointment Status

Review your  
Activity Guide for  
instructions (pg 7)

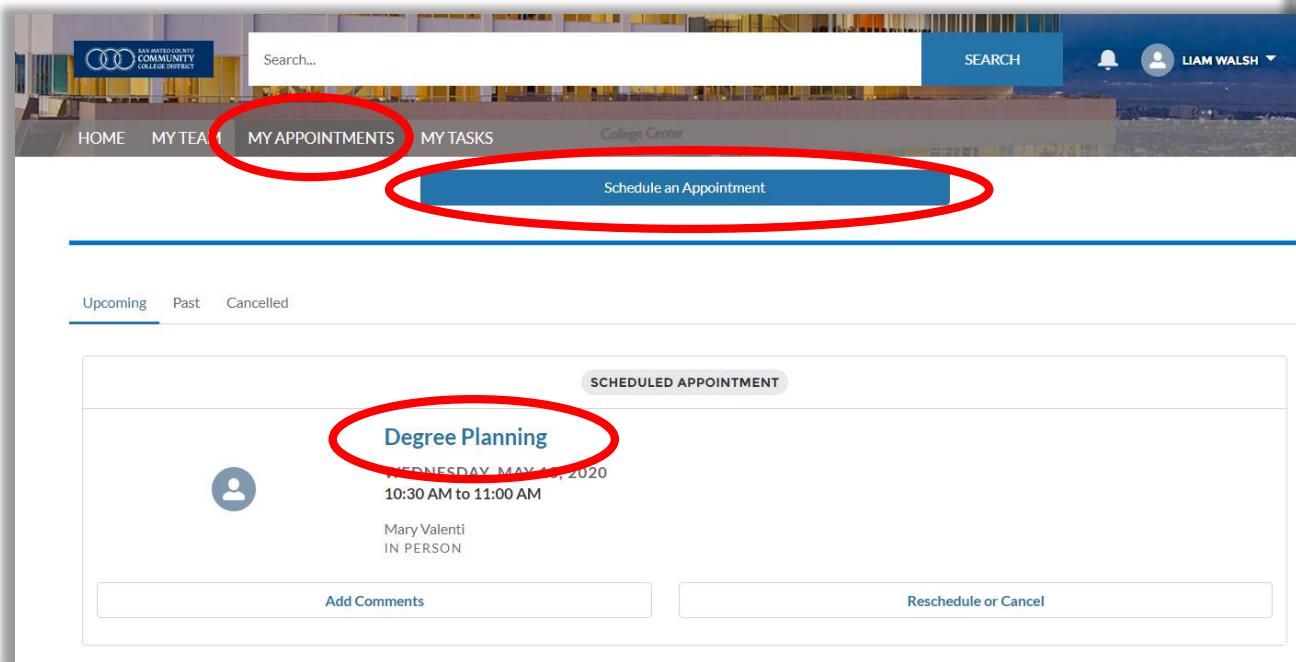
Questions? Ask  
Sandy and Steven!



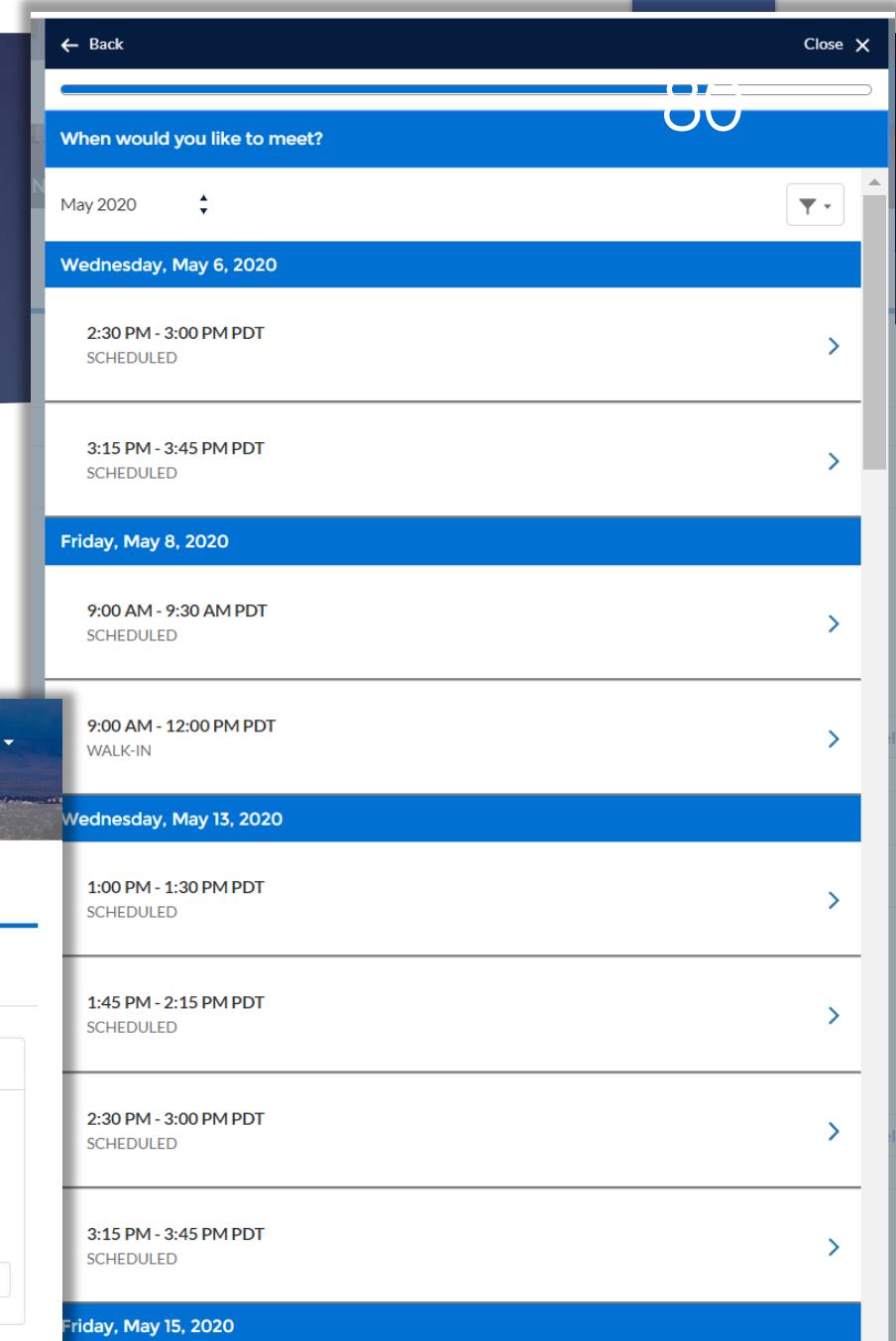
The screenshot shows a CRM software interface with a blue header bar. The header includes a 'Mark Attended' button, a 'Create Appointment' button, and a 'New Opportunity' button. The main content area is titled 'Appointment Academic - Degree Planning'. It displays appointment details in a grid format. The 'Details' tab is selected. The appointment subject is 'Academic - Degree Planning'. The start date is '6/25/2020 2:30 PM' and the end date is '6/25/2020 3:00 PM'. The location is a Zoom link: 'https://smccd.zoom.us/j/6822537626'. The description is empty. The owner is 'Sandy Allen'. The type is empty. The topic is 'Academic' and the subtopic is 'Degree Planning'. The 'Created By' field shows 'Grace Beltran, 5/28/2020 1:41 AM' and the 'Last Modified By' field also shows '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.



The screenshot shows the Student Success Link interface. At the top, there is a navigation bar with tabs: HOME, MY TEAM, MY APPOINTMENTS (which is circled in red), and MY TASKS. Below the navigation bar is a search bar and a 'SEARCH' button. The main content area has tabs for 'Upcoming', 'Past', and 'Cancelled', with 'Upcoming' selected. A list of scheduled appointments is displayed. The first appointment is circled in red and is titled 'Degree Planning' with a subtopic 'WEDNESDAY, MAY 13, 2020 10:30 AM to 11:00 AM' and 'Mary Valenti IN PERSON'. At the bottom of the list are buttons for 'Add Comments' and 'Reschedule or Cancel'.



The screenshot shows a detailed view of the 'My Appointments' section. At the top, there is a header with a back button, a close button, and a date selector showing 'May 2020' with a dropdown arrow. Below the header, a date 'Wednesday, May 6, 2020' is highlighted in blue. A list of time slots for that day is shown, with the first slot '2:30 PM - 3:00 PM PDT SCHEDULED' circled in red. The list then moves to 'Friday, May 8, 2020', showing a slot '9:00 AM - 9:30 AM PDT SCHEDULED'. Finally, it moves to 'Wednesday, May 13, 2020', showing a slot '9:00 AM - 12:00 PM PDT WALK-IN'. The list continues for May 15, 2020, with slots '1:00 PM - 1:30 PM PDT SCHEDULED', '1:45 PM - 2:15 PM PDT SCHEDULED', '2:30 PM - 3:00 PM PDT SCHEDULED', and '3:15 PM - 3:45 PM PDT SCHEDULED'.

# *Resources and Next Steps*



# Future Phases

- ▶ **Phase 2 Soft Launch (June 15<sup>th</sup>)**
  - ▶ 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 16<sup>th</sup>
  - ▶ 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