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

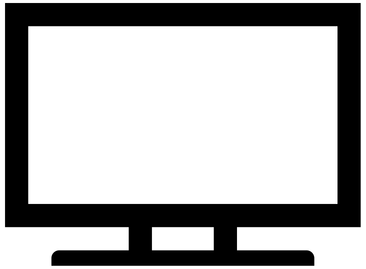
Housekeeping

- 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

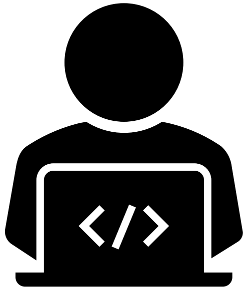
Training Format

Presentation

Demo

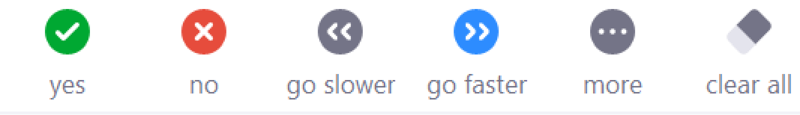


DIY
Activity Guide



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

SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT

- 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

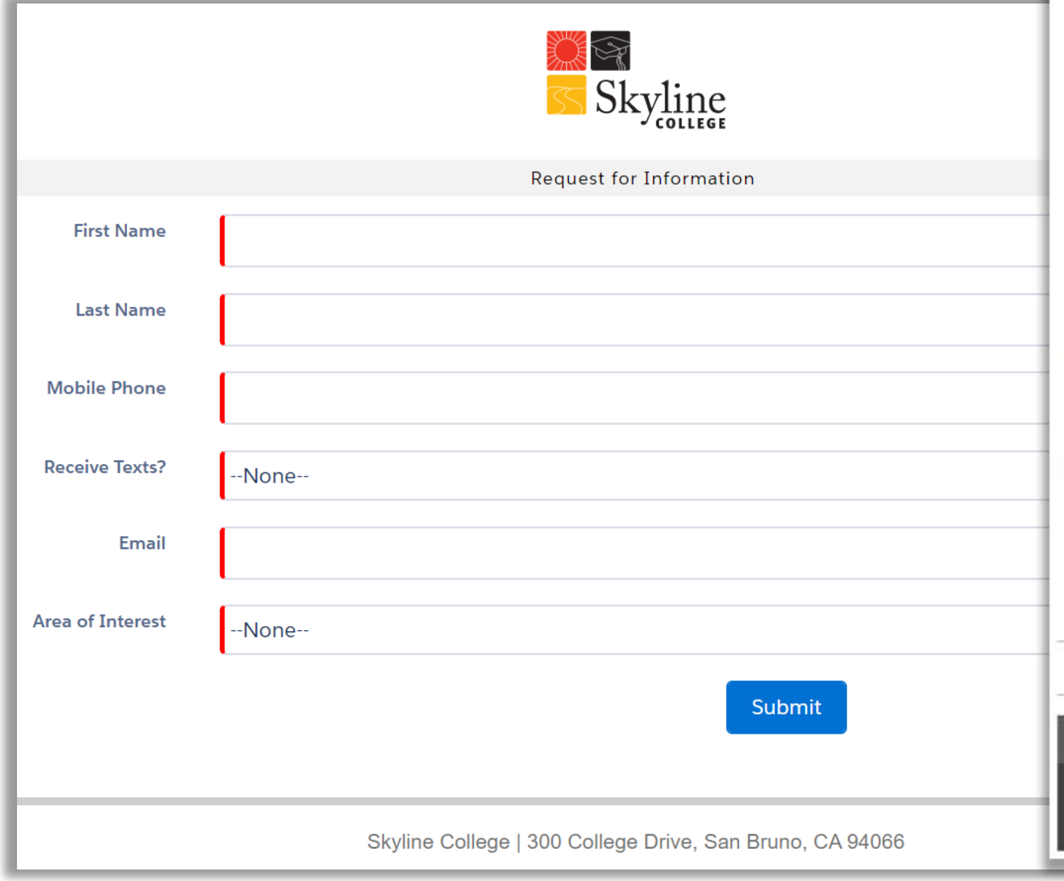
Overview of CRM Capabilities

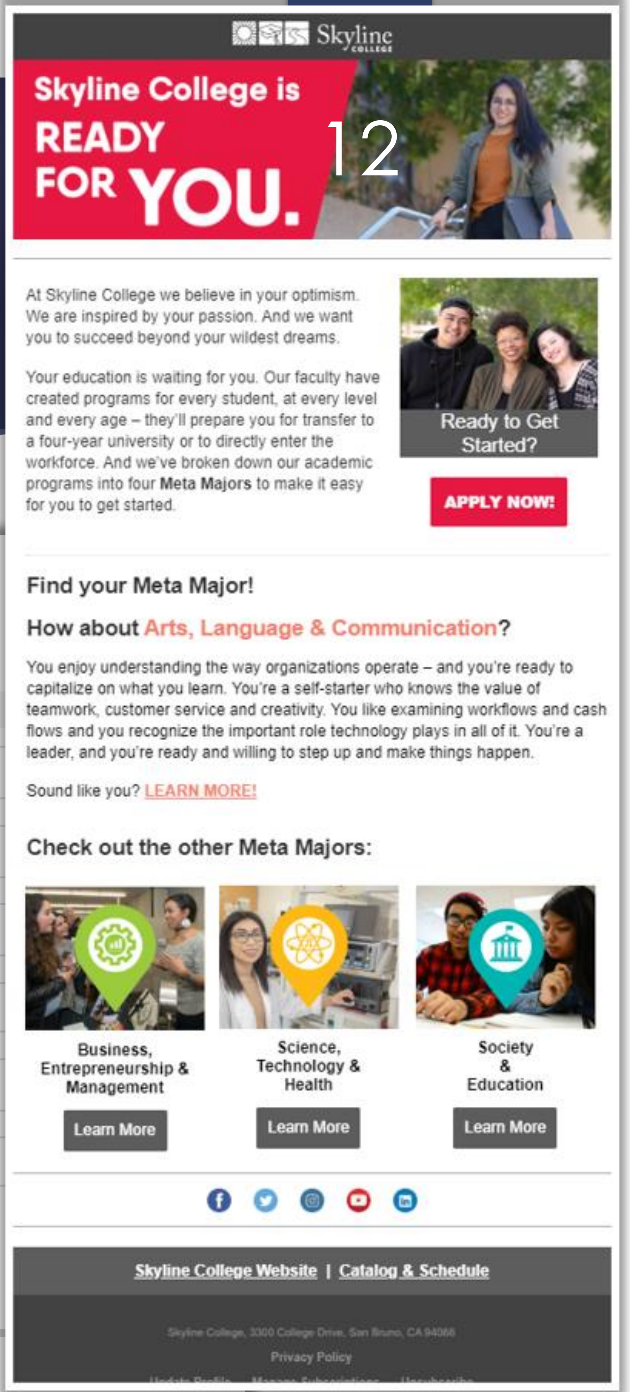
- System of Engagement vs. System of Record
  - Engage (and reengage) prospects and current students
  - Communication (Email/Text/Push Notifications/Phone)
  - Alerts and Interventions, i.e. Success Plans
  - Chatbots and Knowledge Base Articles
  - Integration of systems (Canvas, Banner, Degree Works,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

Overview of CRM work thus far….

PHASE 1: Recruitment and Marketing

- Recruitment Discovery & Creation
  - Process Maps
  - RFI Forms





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

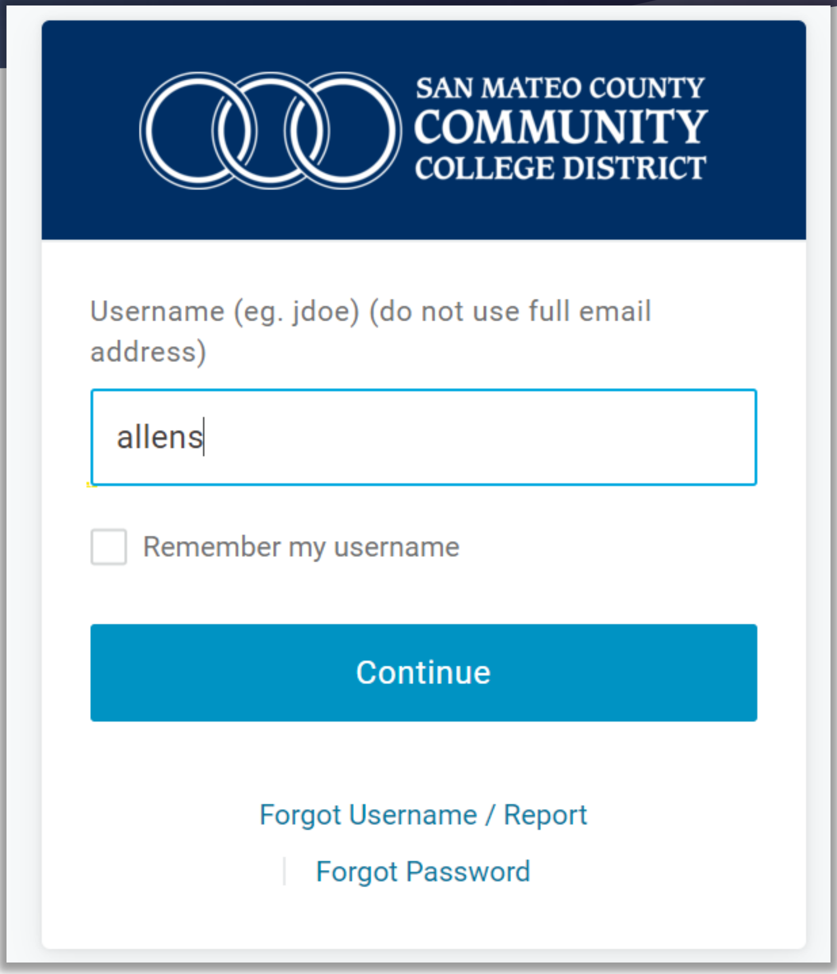
- **SSO: Single Sign On**
  - A tool used for Single Sign On, or OneLogin
  - Login to this portal with your network password to access all your apps (Student Success Link, Canvas, DegreeWorks, etc.)

- **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

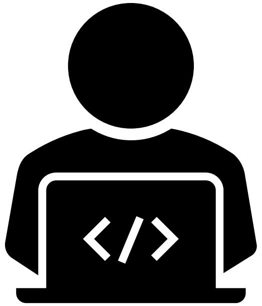
- You will use OneLogin, to access Salesforce Sandbox for training today, as well as the Student Success Link after June 14th
- Bookmark this link! You will use it!
  - SMCCD.onelogin.com
- Login with your network username and password, the same login credentials you use to login to your computer
- If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

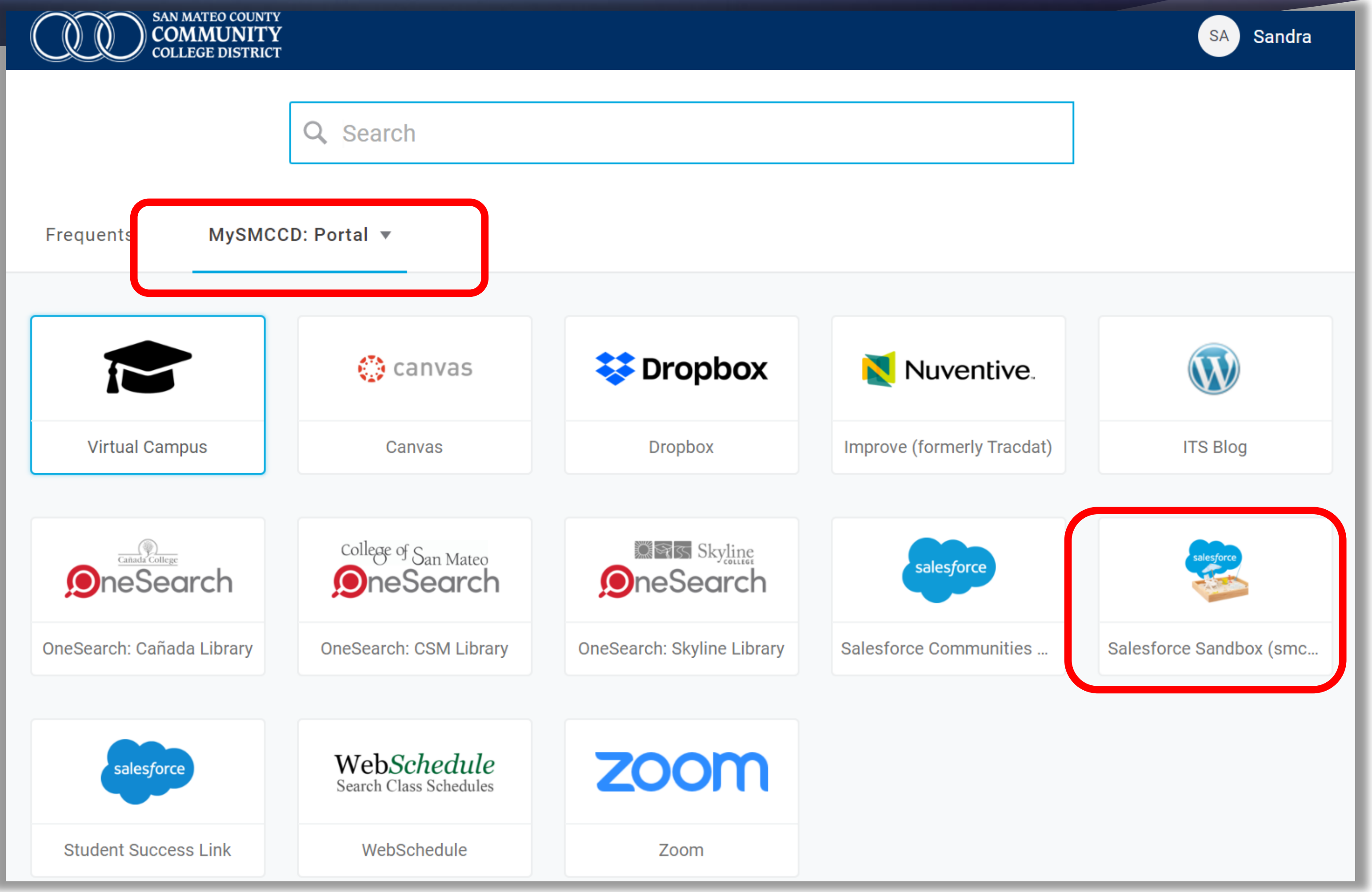


Activity #1: Log into SSO and Salesforce Sandbox

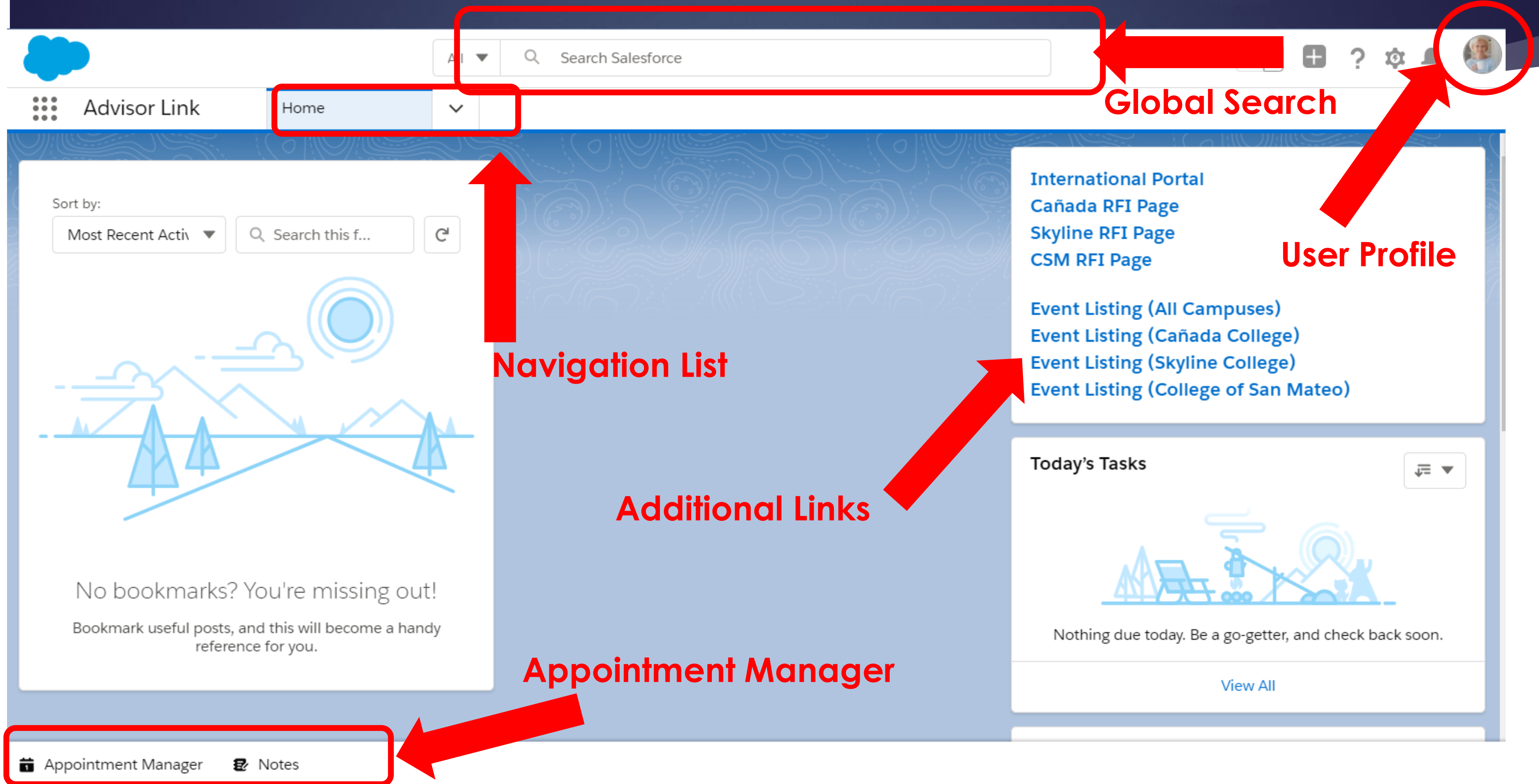
Review your Activity Guide for instructions (pg 1)

Questions? Ask Sandy and Steven!





Navigation: Initial Login

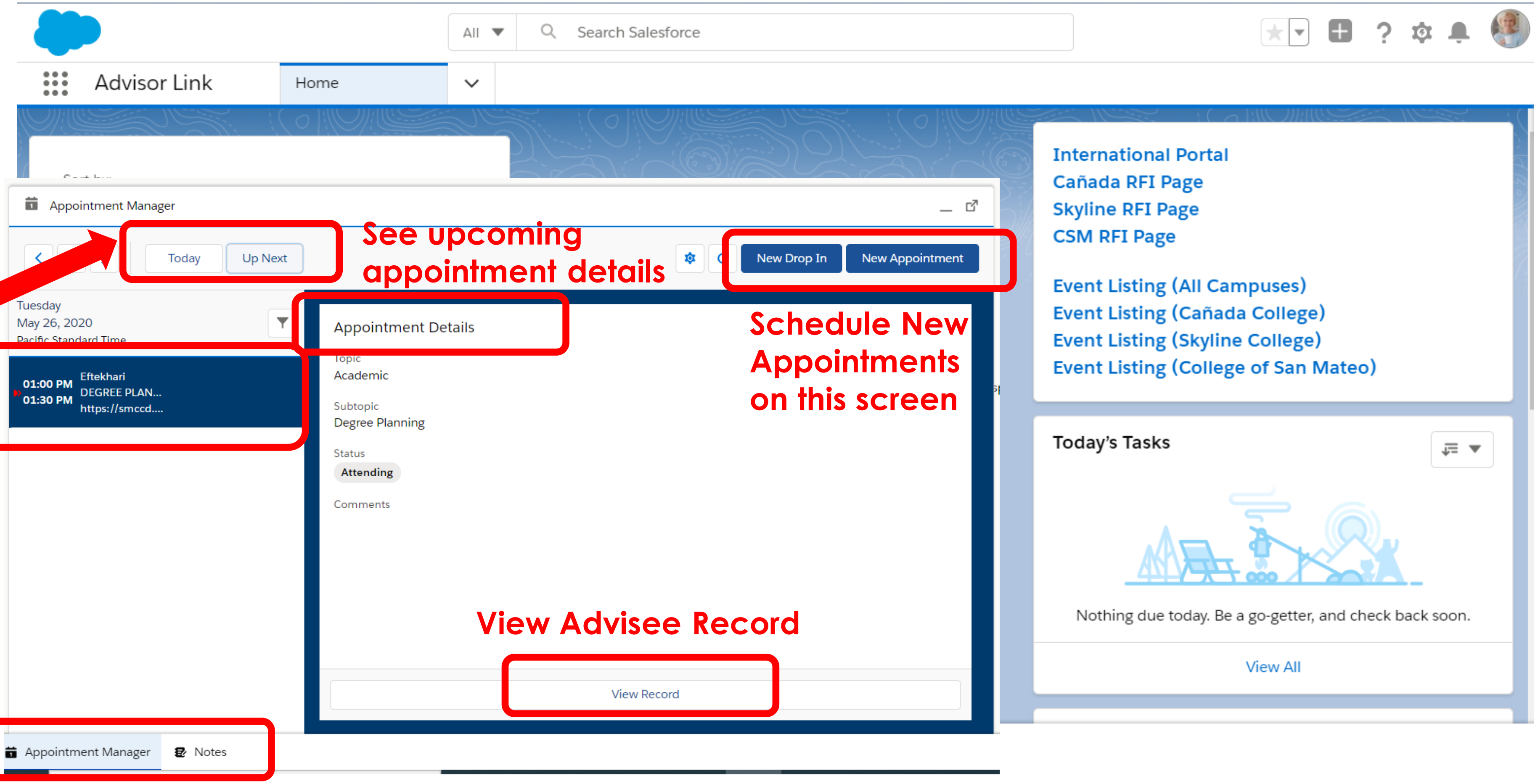


Navigation: Appointment Manager

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

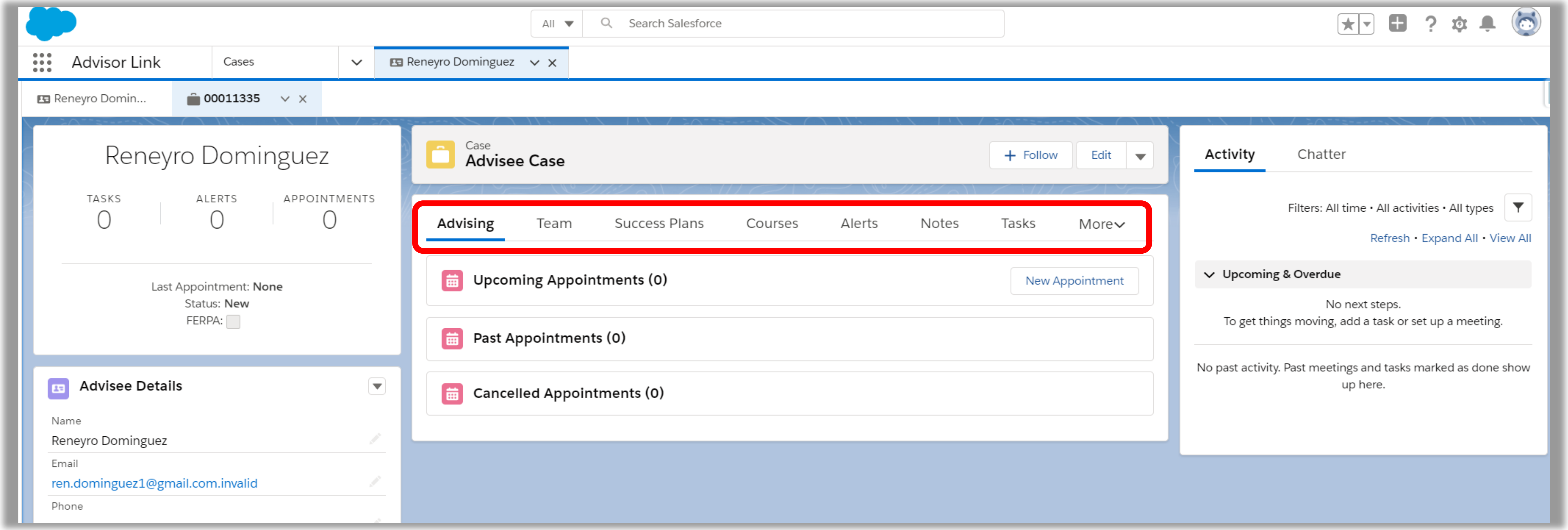
Click Up “Up Next”, or “Today” to see upcoming Appointments

Click Appointment Manager to expand window

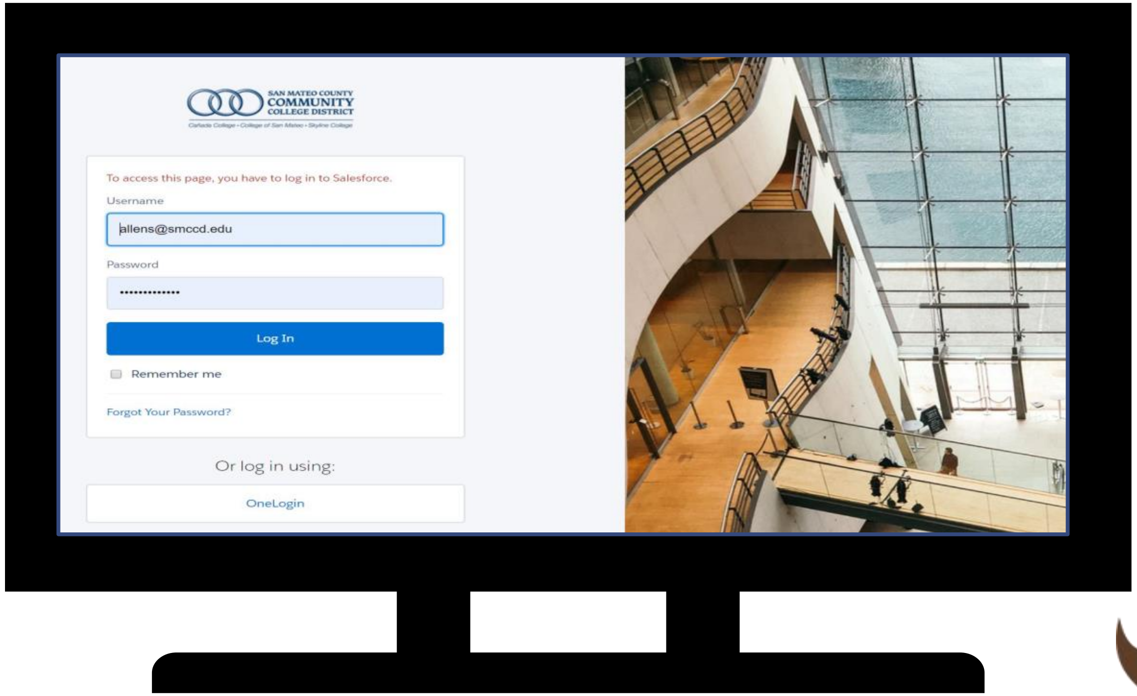


Navigation: Student Case Record

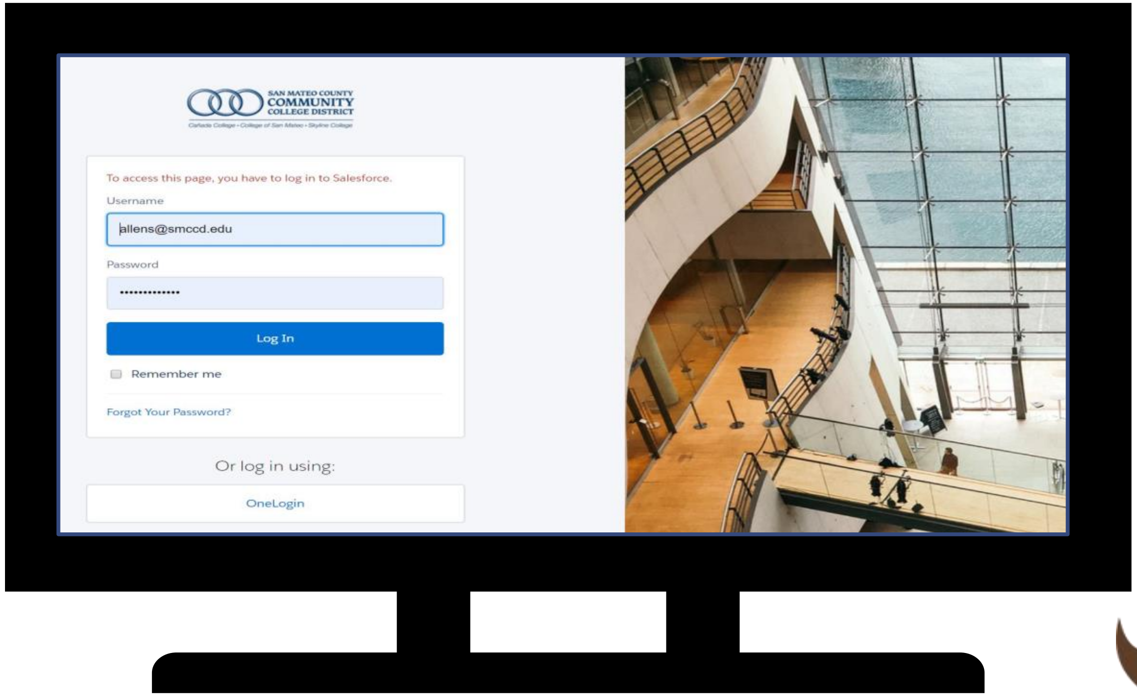
The student case record includes information on upcoming Appointments, Success Team members, Courses, Notes, and Tasks/Enrollment Steps



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



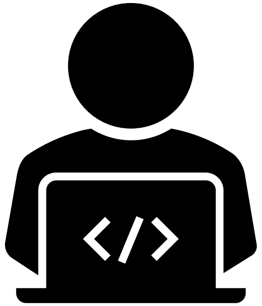
Demo: Pin "My Advisee View", Add a Picture, Update Profile Info

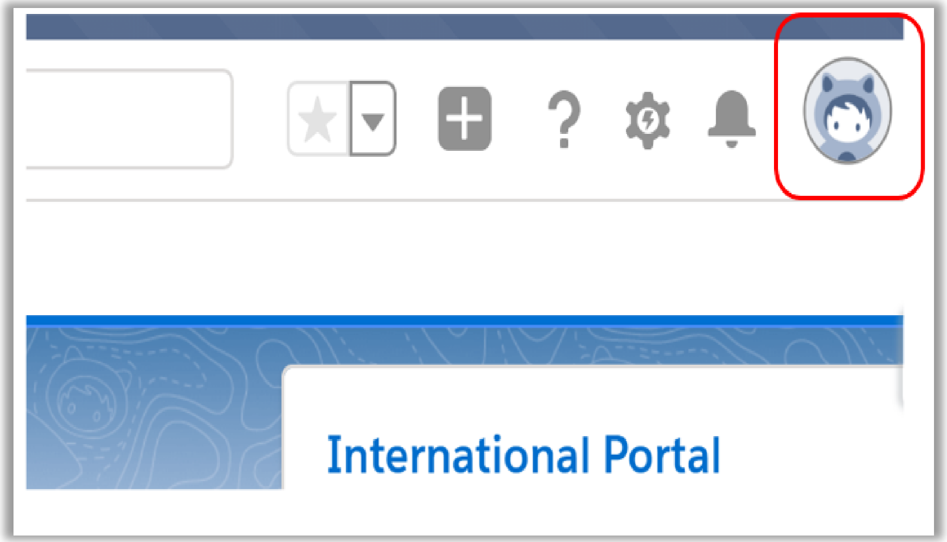


Activity #2: Update Profile and Pin "My Advisees" View

Review your Activity Guide for instructions (pg 2)

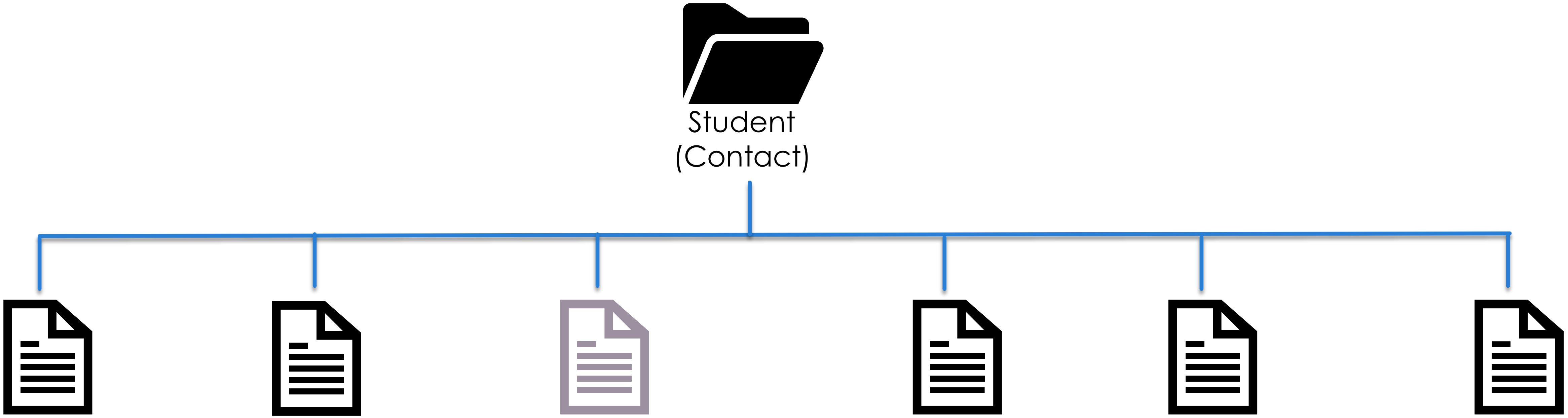
Questions? Ask Sandy and Steven!



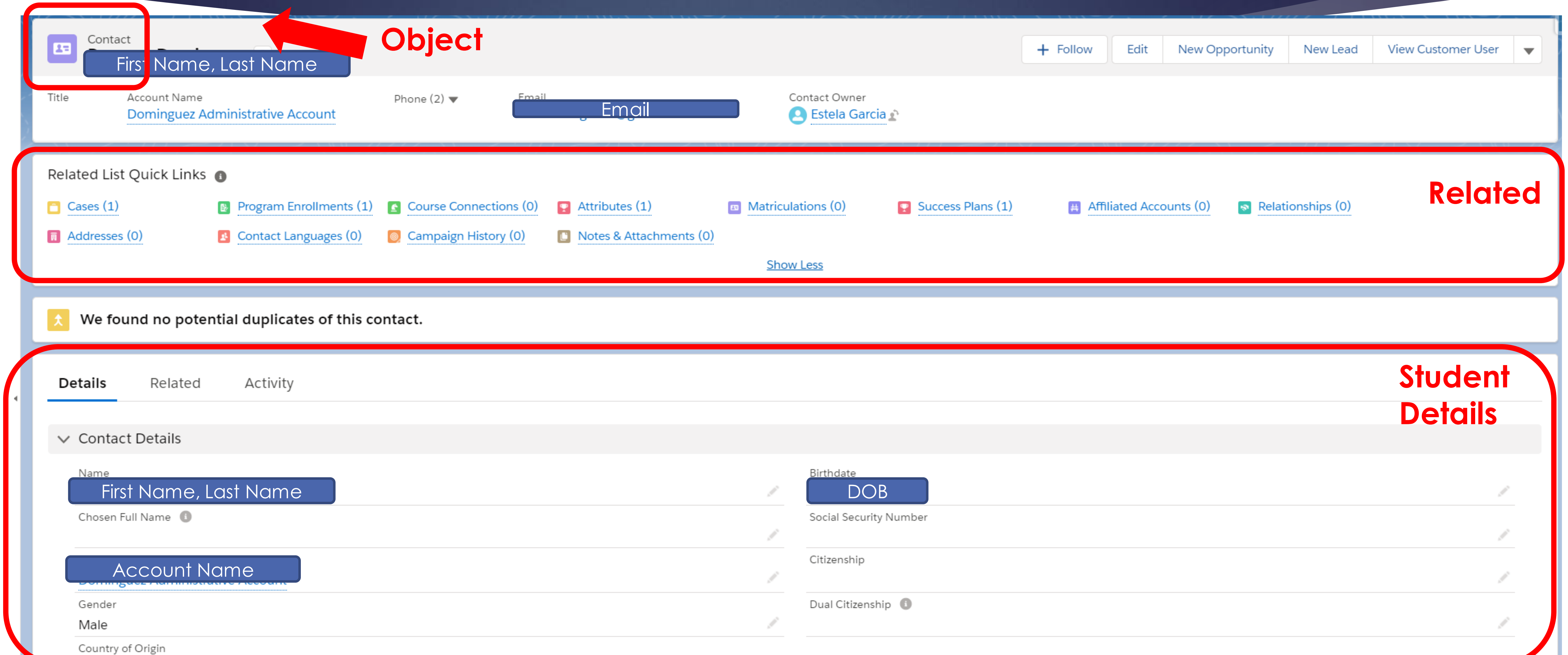


Types of Records

Object Types: Contact Object



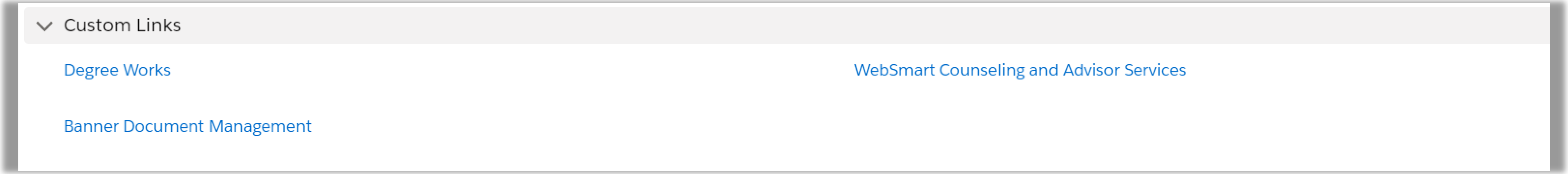
Student Contact Example



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.

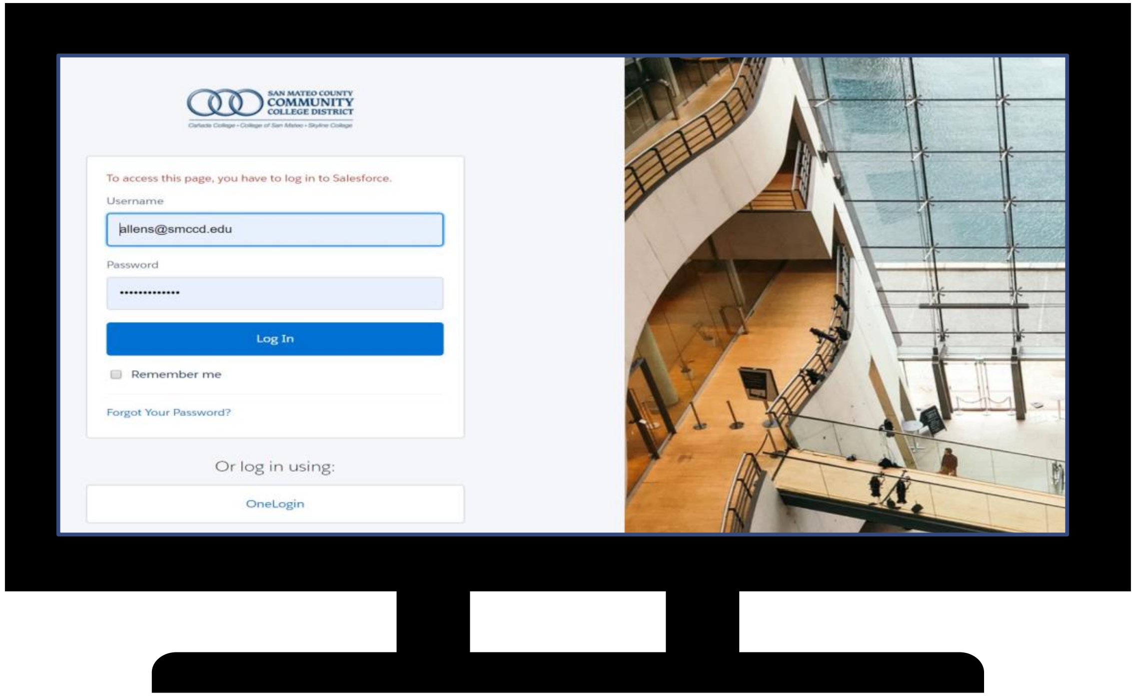
*DegreeWorks is a link to the main DegreeWorks login, not specific student records



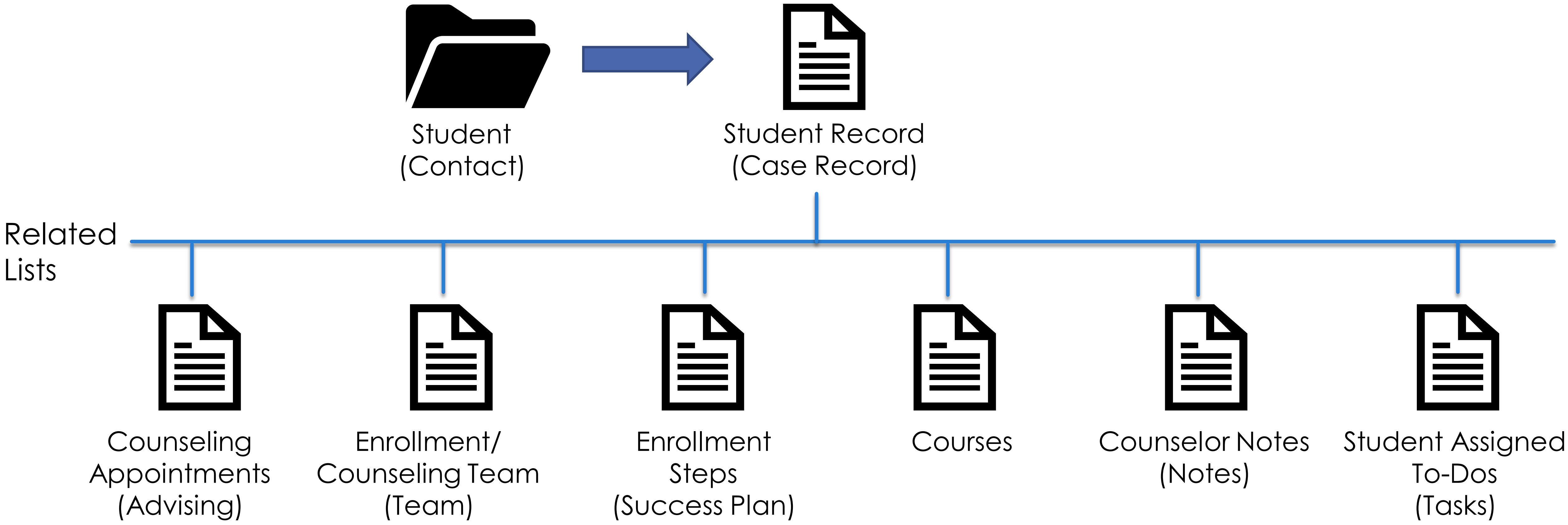
Where to Find Data

Student Success Link Record	Key Data Metrics		
Student Contact	• GID • Birthday	• Mailing Address • Deep Links	• Preferred first name • Personal pronoun
Student Case	• Counseling Apts • Courses	• Counseling/Enrollment Team	• Notes • Tasks
Program Enrollment	• Program of Study		
Course Connections	• Courses the student is enrolled in		
Attributes	• Student Type • Foster Youth	• CalWorks • CARE	• EOPS • Promise
Matriculation	• Counseling Status • Orientation Status	• Ed Plan Status • Assessment Status	• MyMajors Info
Enrollment Steps	• Enrollment Steps		

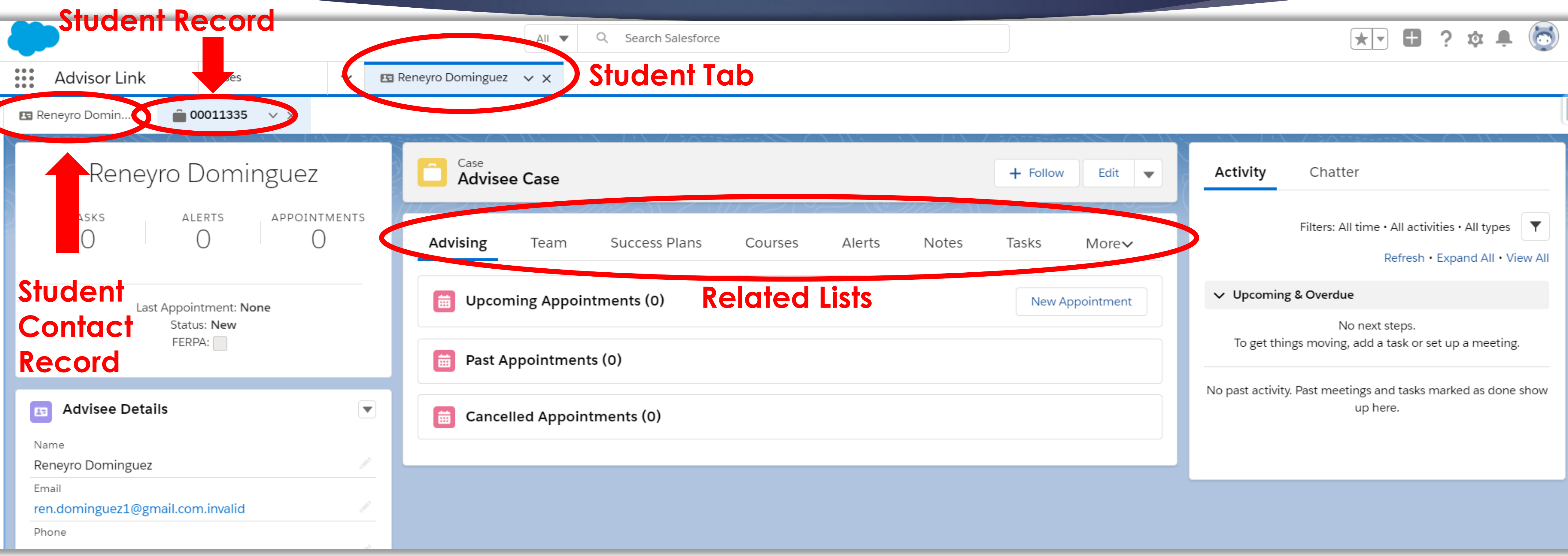
Contact Record Demo



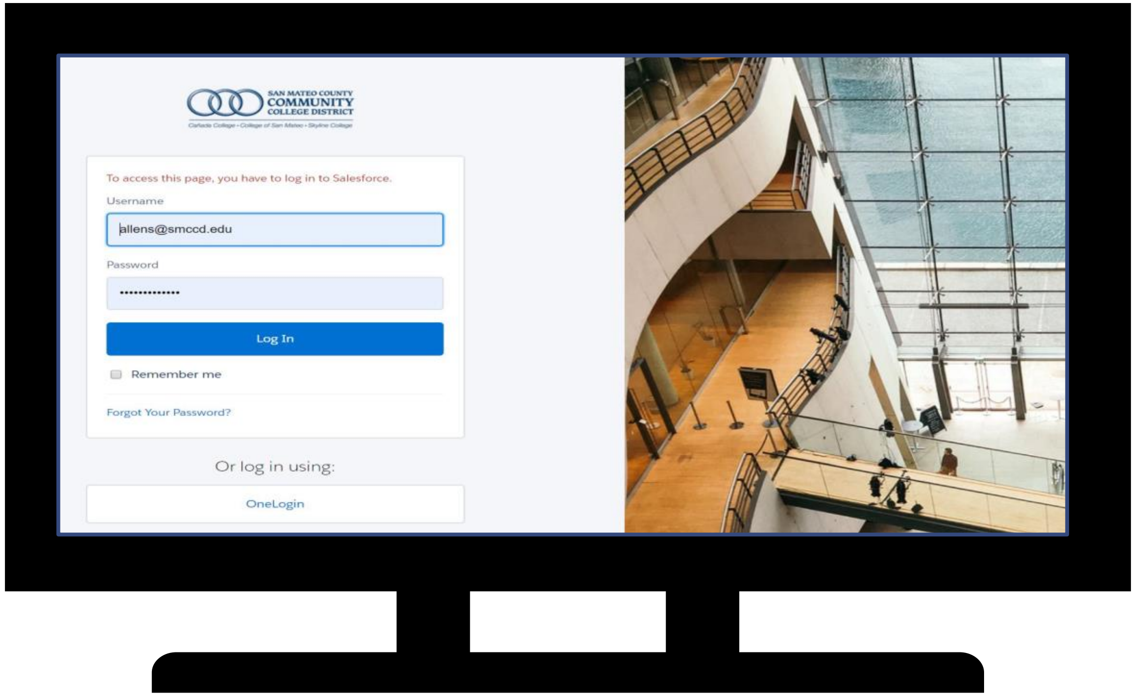
Student Case



Student Case Example



Case Record Demo

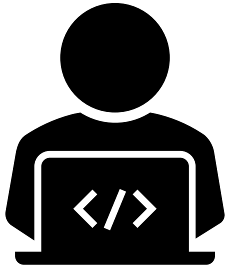


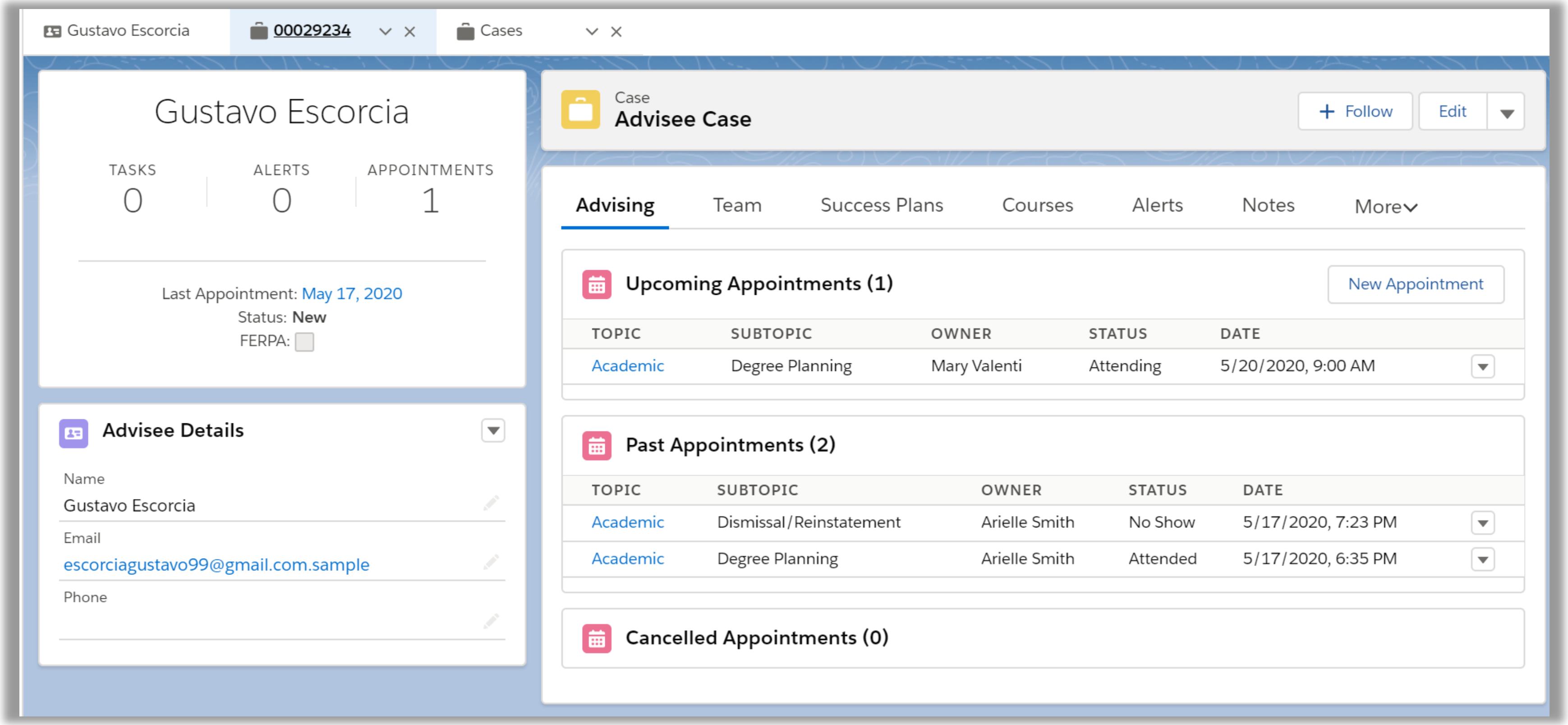
Activity#3 Find Your Student Case

Review your Activity Guide for instructions (pg 4)

Questions? Ask Sandy and Steven

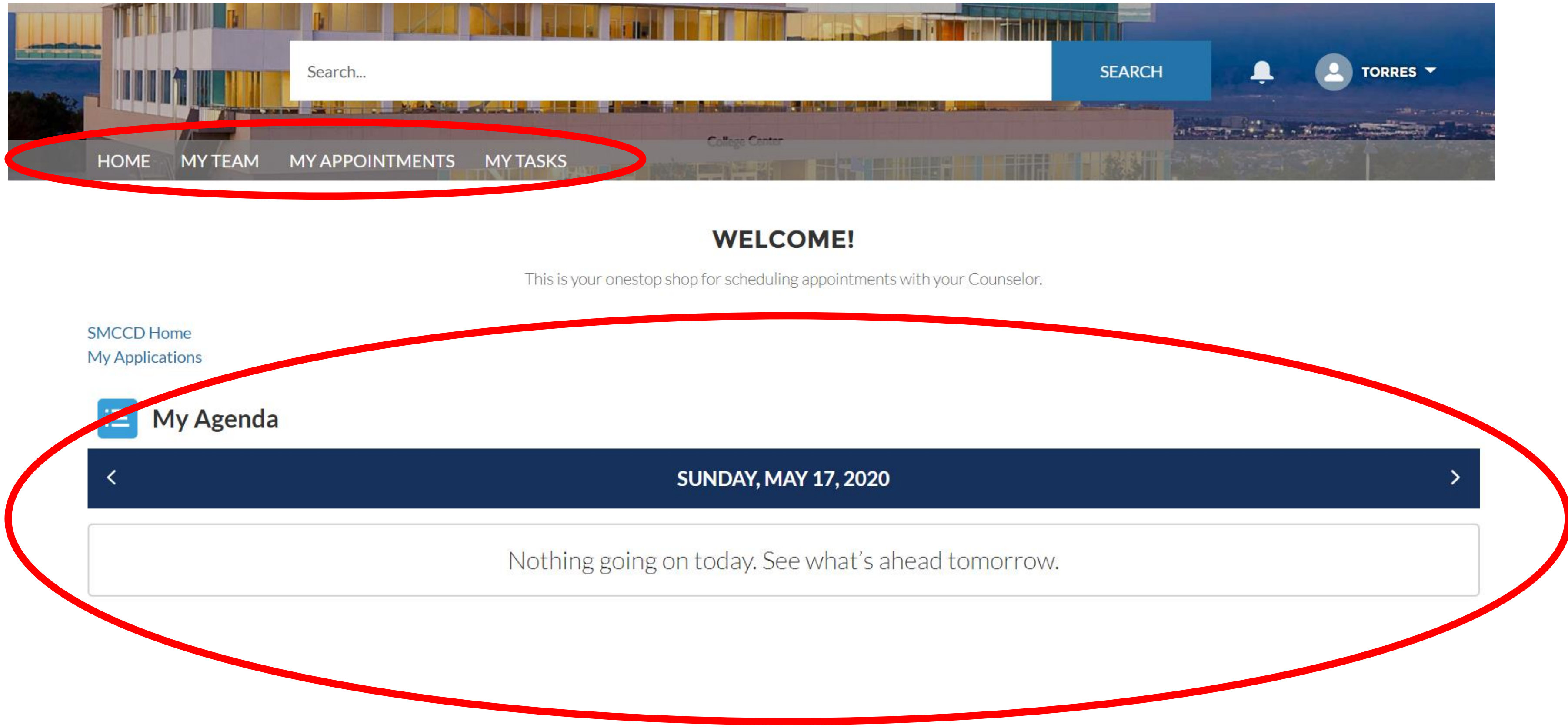
Click the Red X if you need help!





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
- Financial Aid
- Residency Specialist
- General Counseling Pool

First Counseling Appointment

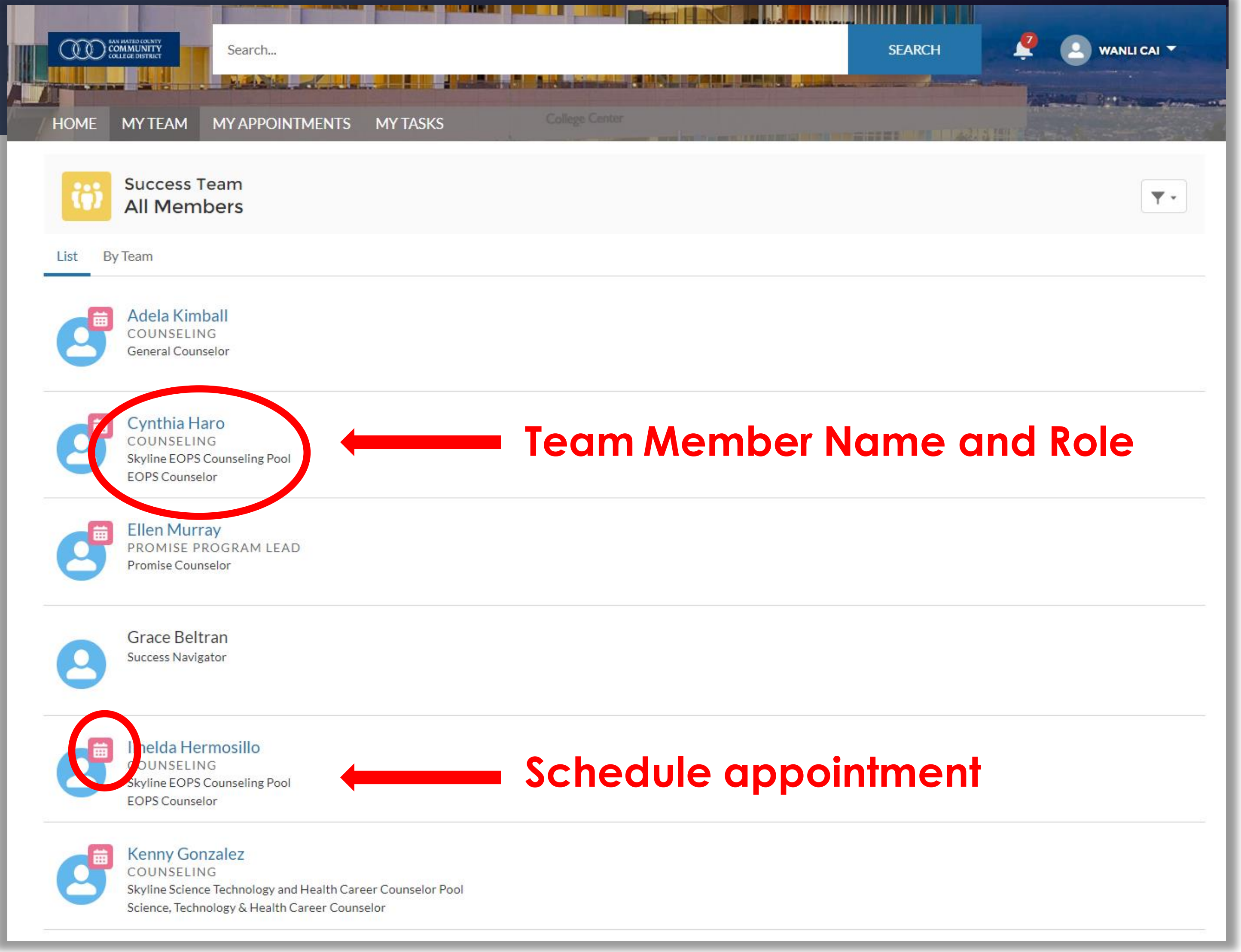
"General Counselor" clicks Assign Success Team Button

Additional Individual Team Members Assigned

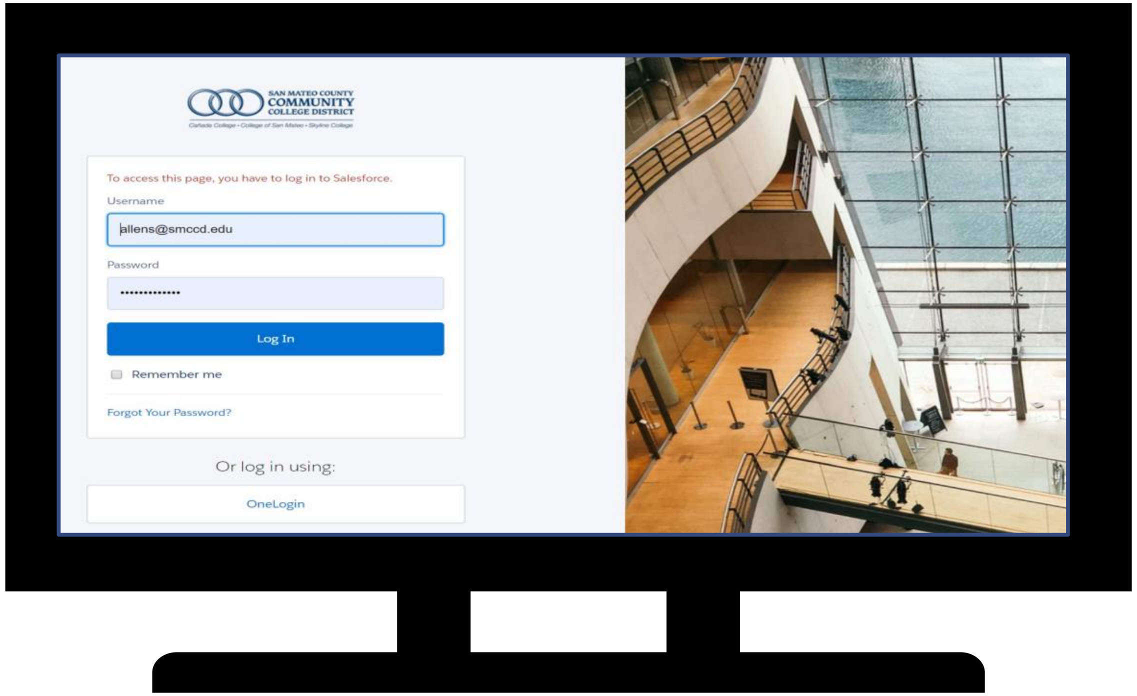
- DRC Counselor
- Promise Counselor
- ESL Counselor
- EOPS Counseling Pool
- Transfer Counseling Pool

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



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

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

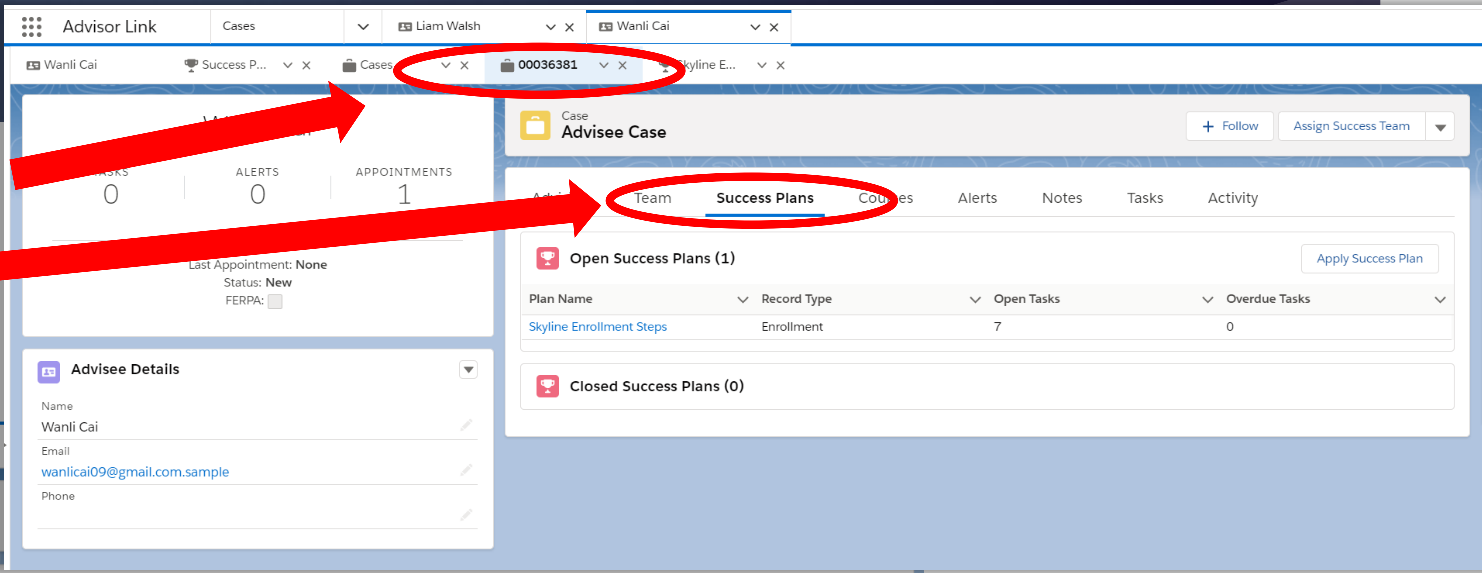
Success Plan Template Tasks (5)

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

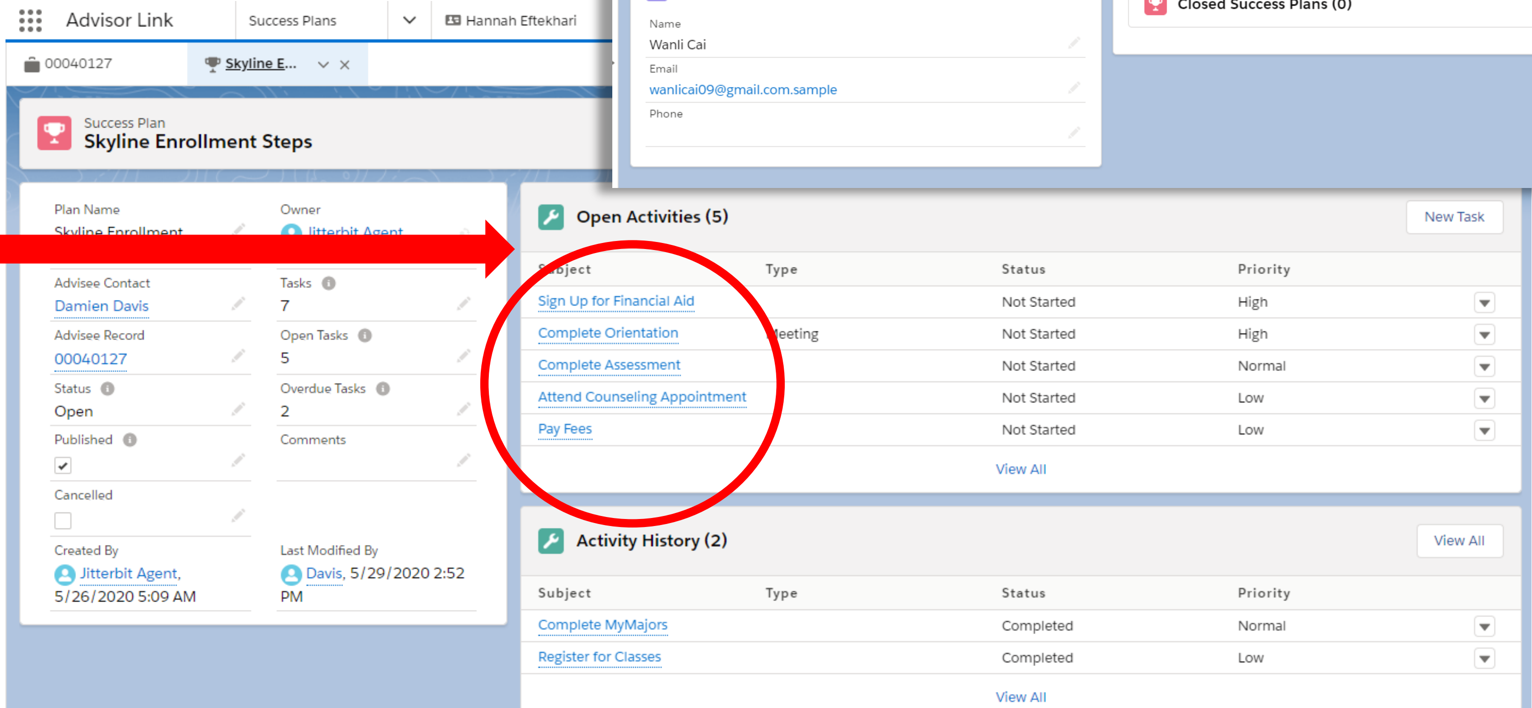
Success Plans: View Enrollment Steps

1. Navigate to the Case Record

2. Click Success Plans



3. Review Tasks

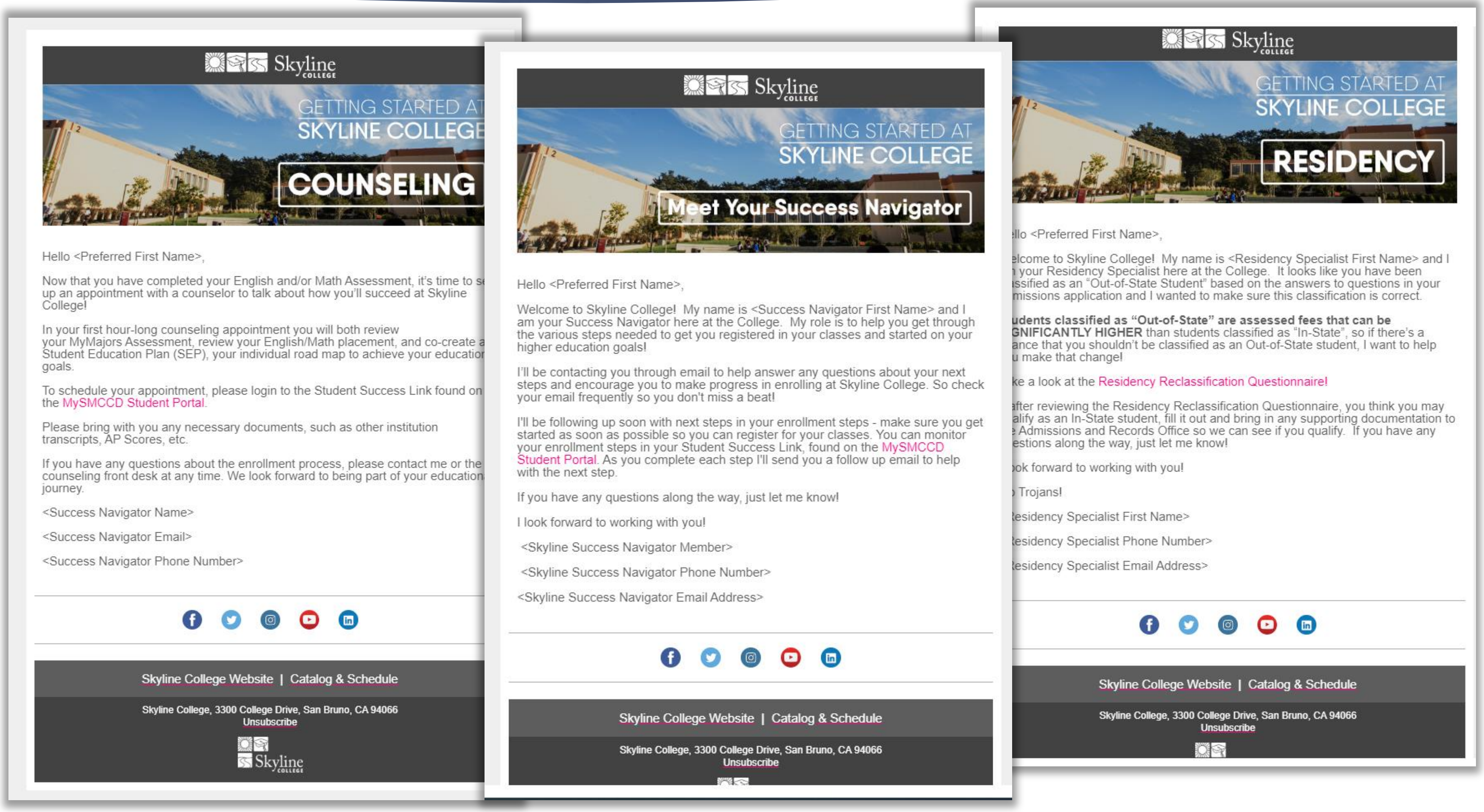


Student Success Link: Marketing Cloud Messages

Students get custom

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

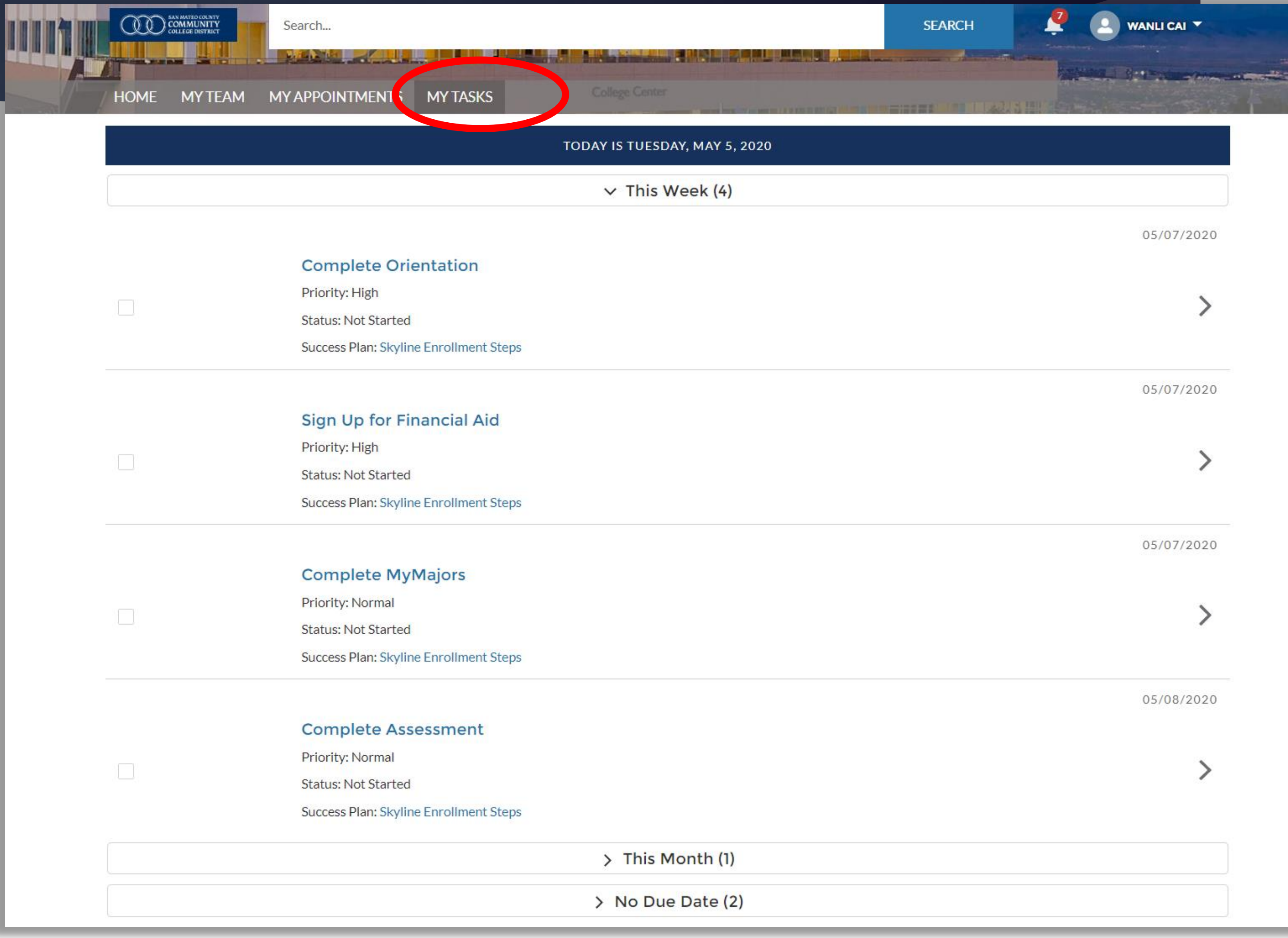
Check out your Pre-Training resources for a look at each email



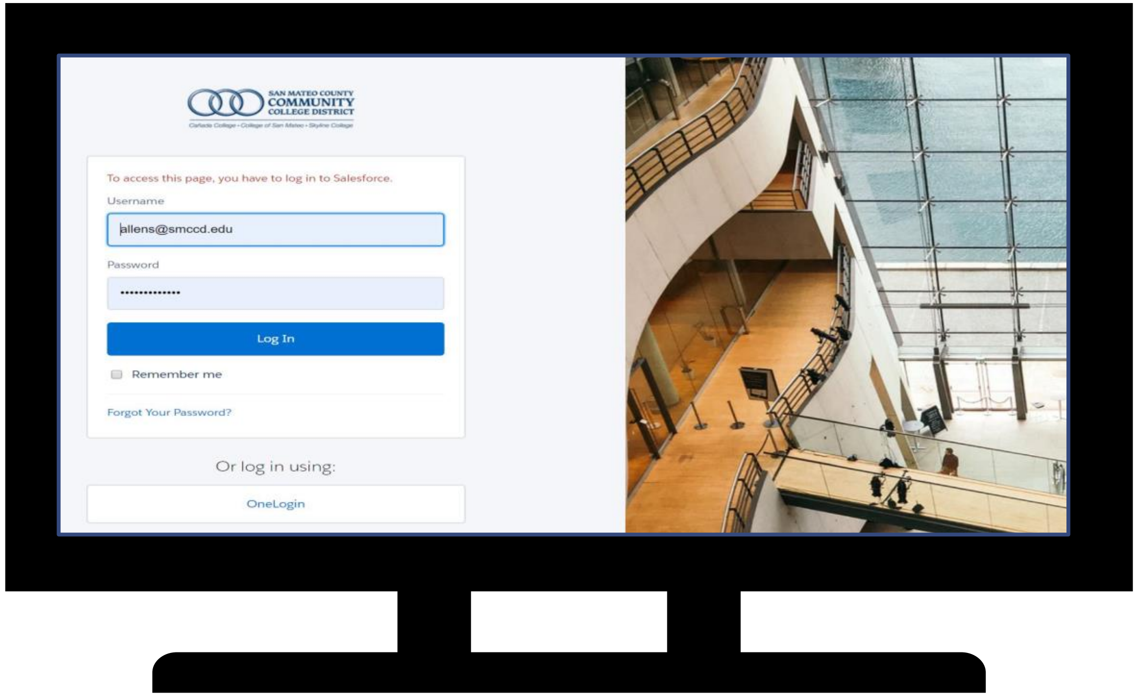
Student Success Link: My Tasks

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

This is a view only screen for students.



Success Plan Demo



Any volunteers to demo?

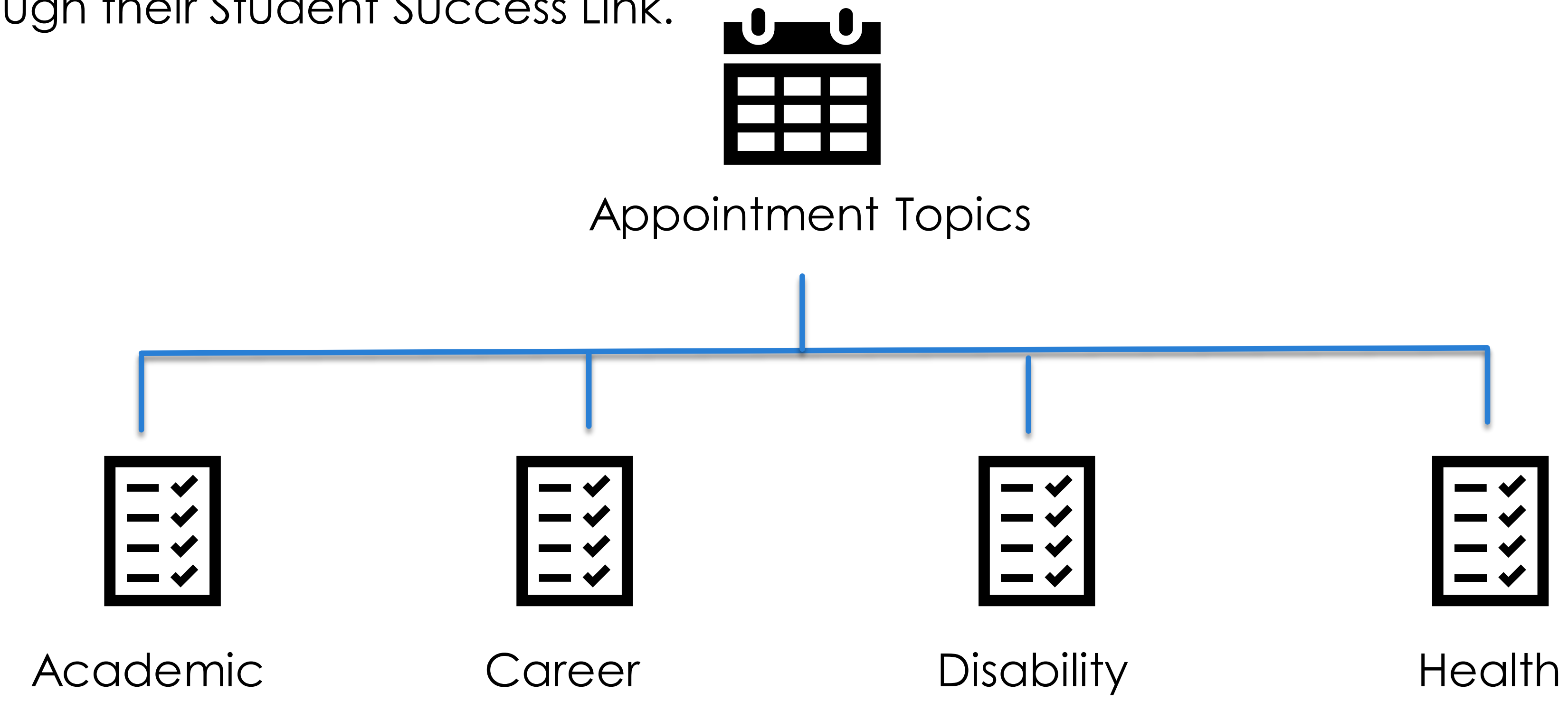
POP QUIZ #2!

5 Minute Break

About Appointments

About Appointments

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



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	SVRCNAD
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

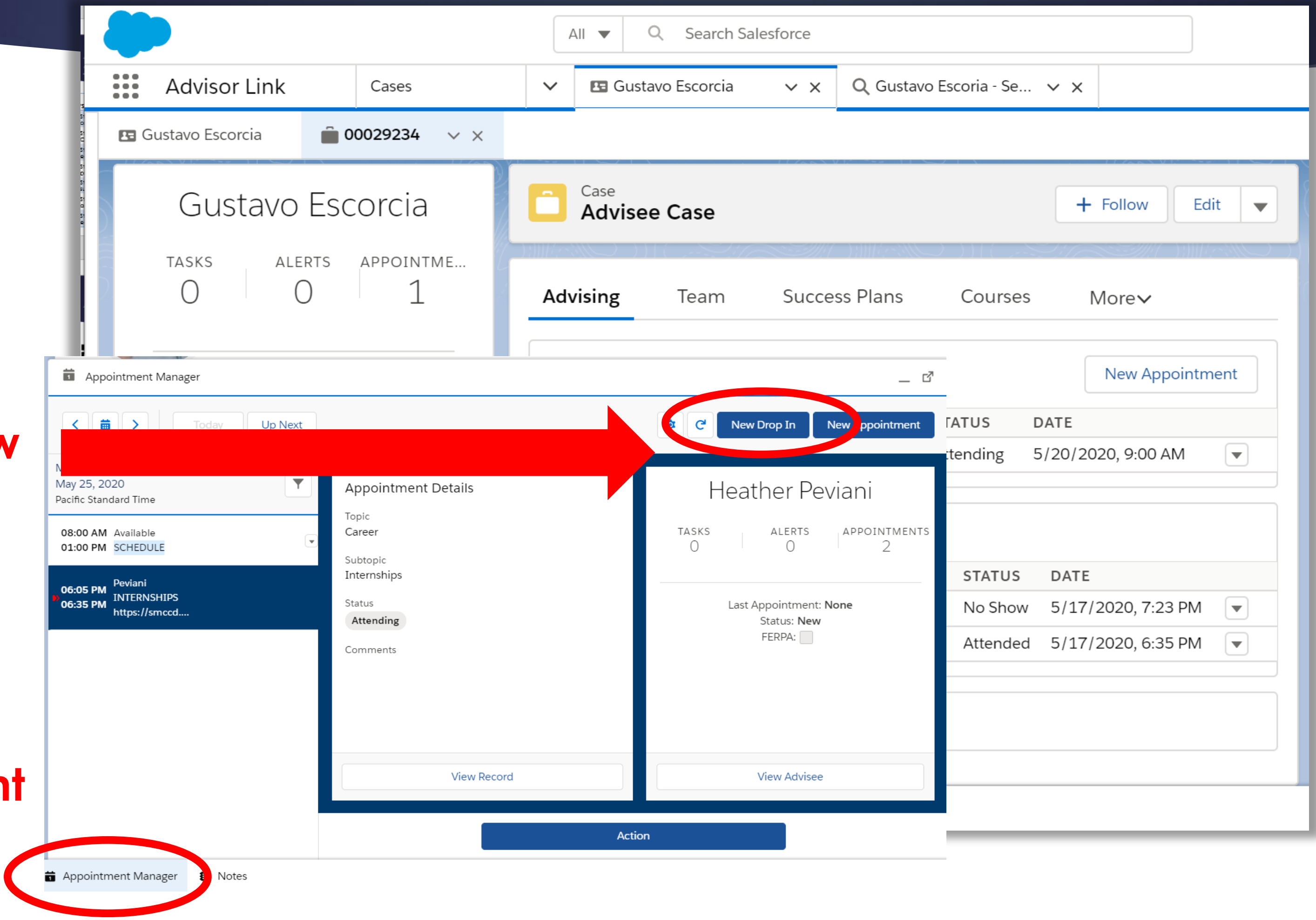
“Drop-In” are for in person Drop In counseling time. These are recorded by counselors.

Schedule Appointments

Schedule a Drop In Appointment

2. Click "New Drop In"

1. Click the Appointment Manager



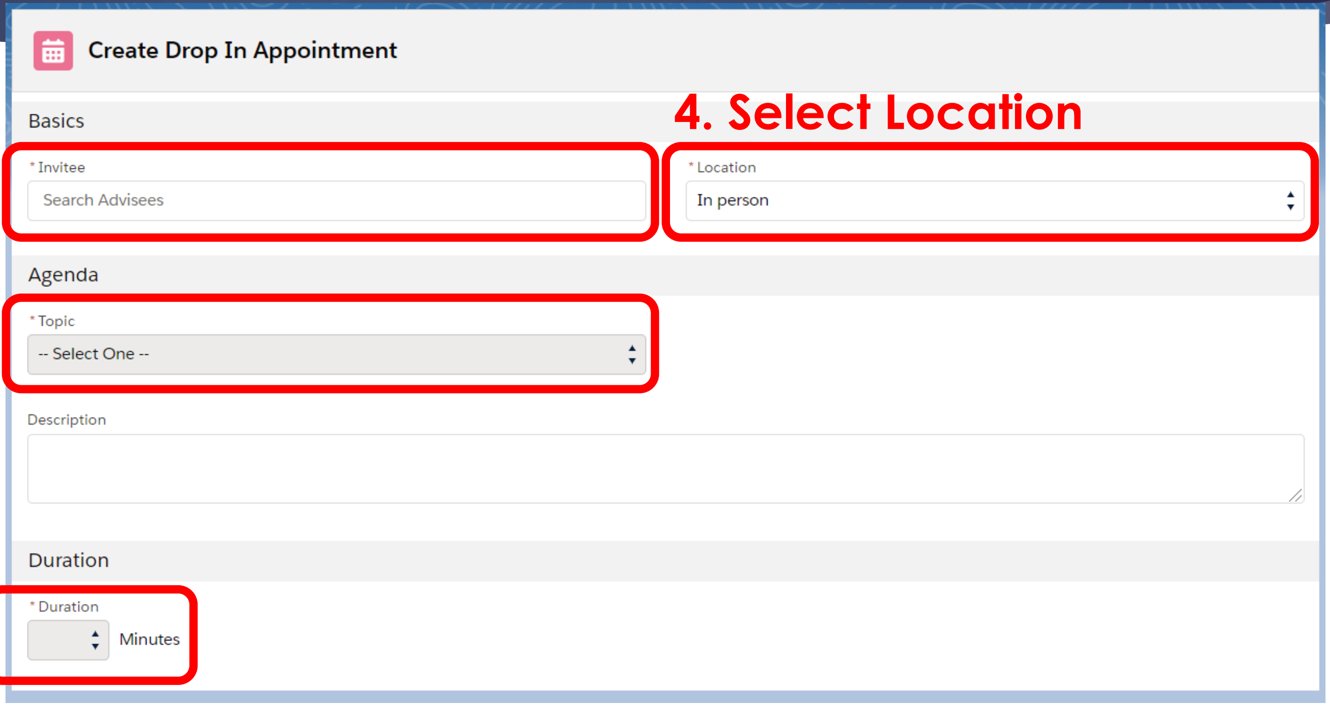
Schedule a Drop In Appointment

3. Search Advisee in “Invitee”

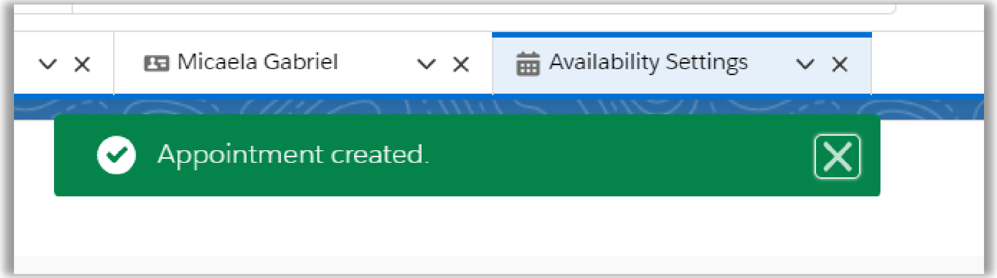
4. Select Location

5. Select topic and subtopic

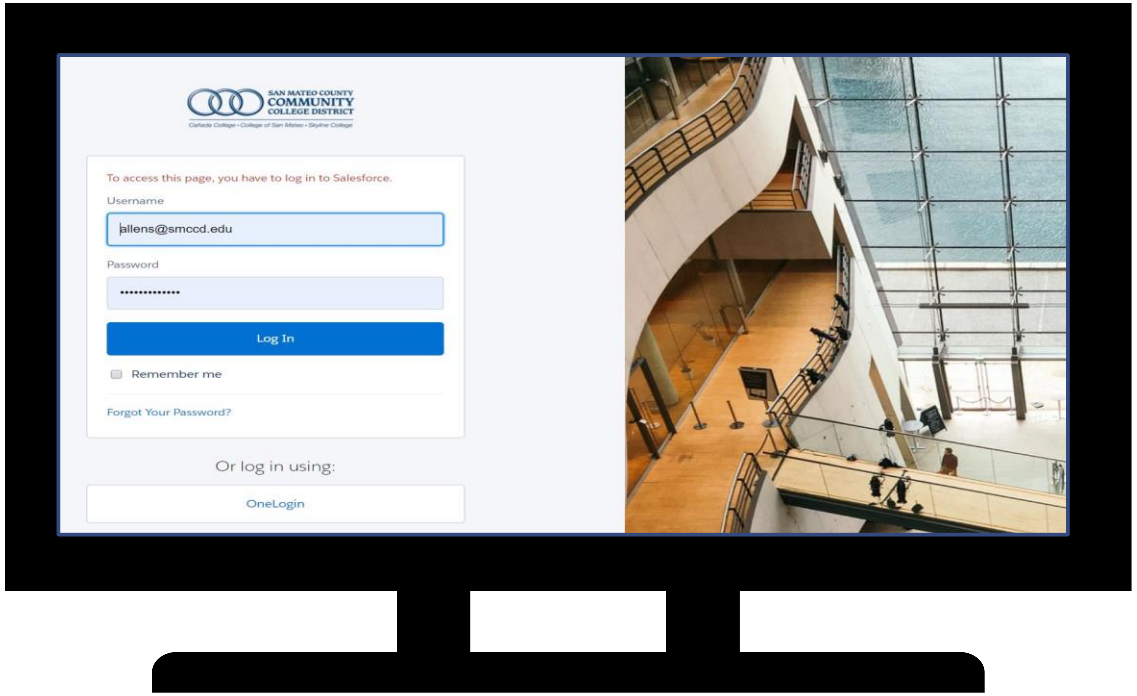
6. Select drop in duration



7. Click Save and Appointment is created



Demo Drop In Appointment



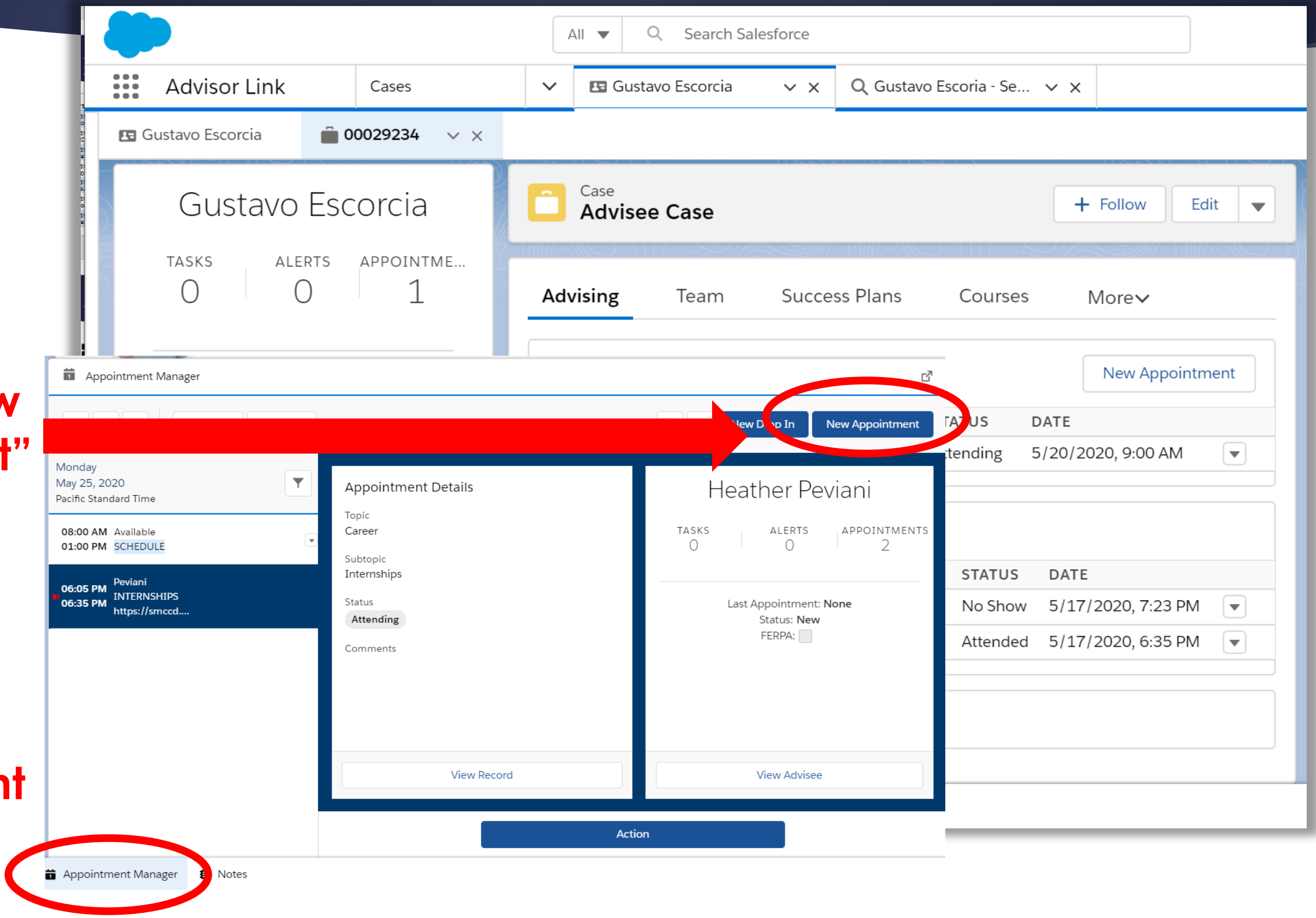
Third Party Scheduling Appointments

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

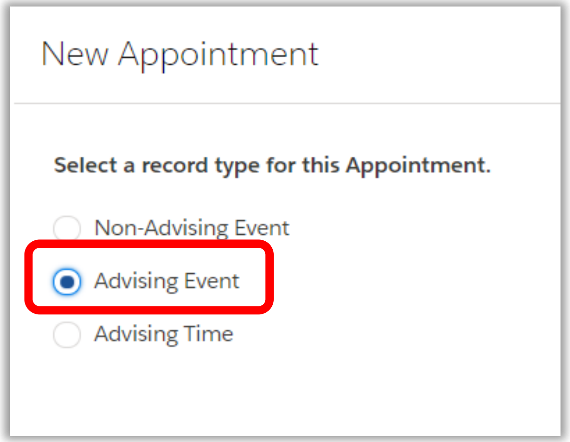
2. Click "New Appointment"



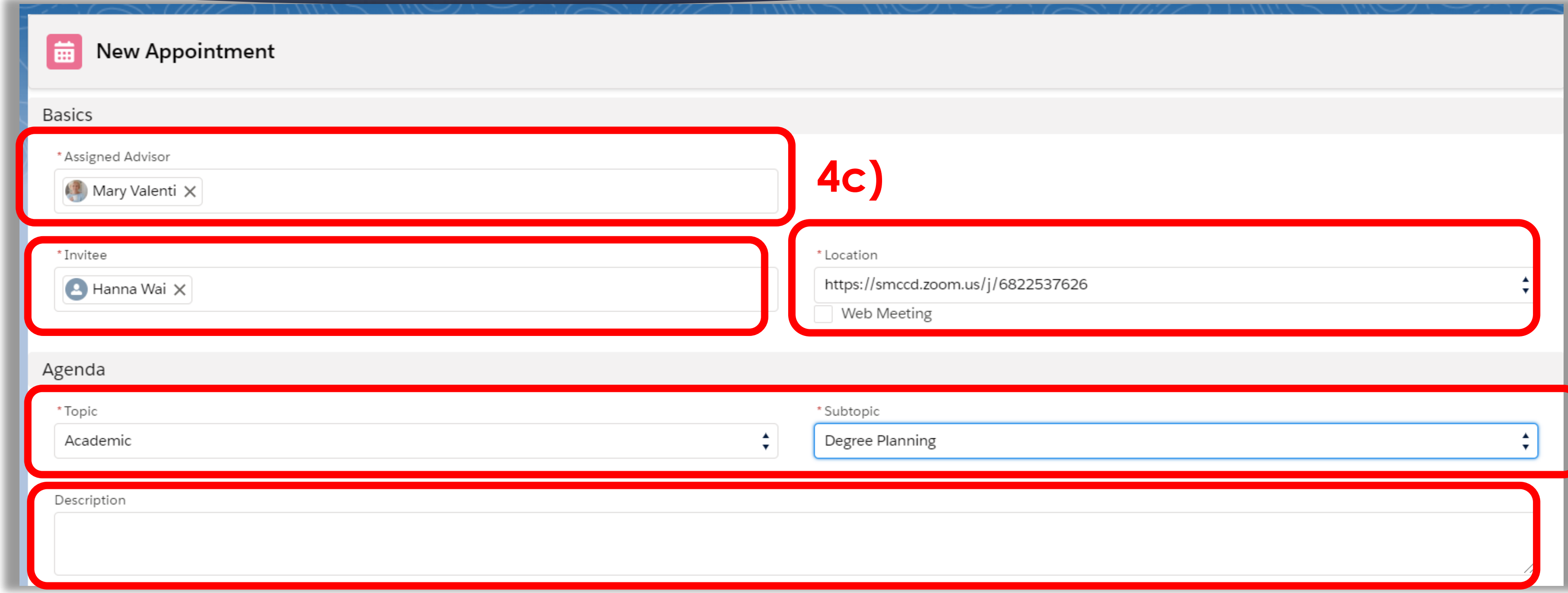
1. Click the Appointment Manager

Third Party Scheduling

3. Select Advising Event



4a)
4b)
4c)
4d)
4e)



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

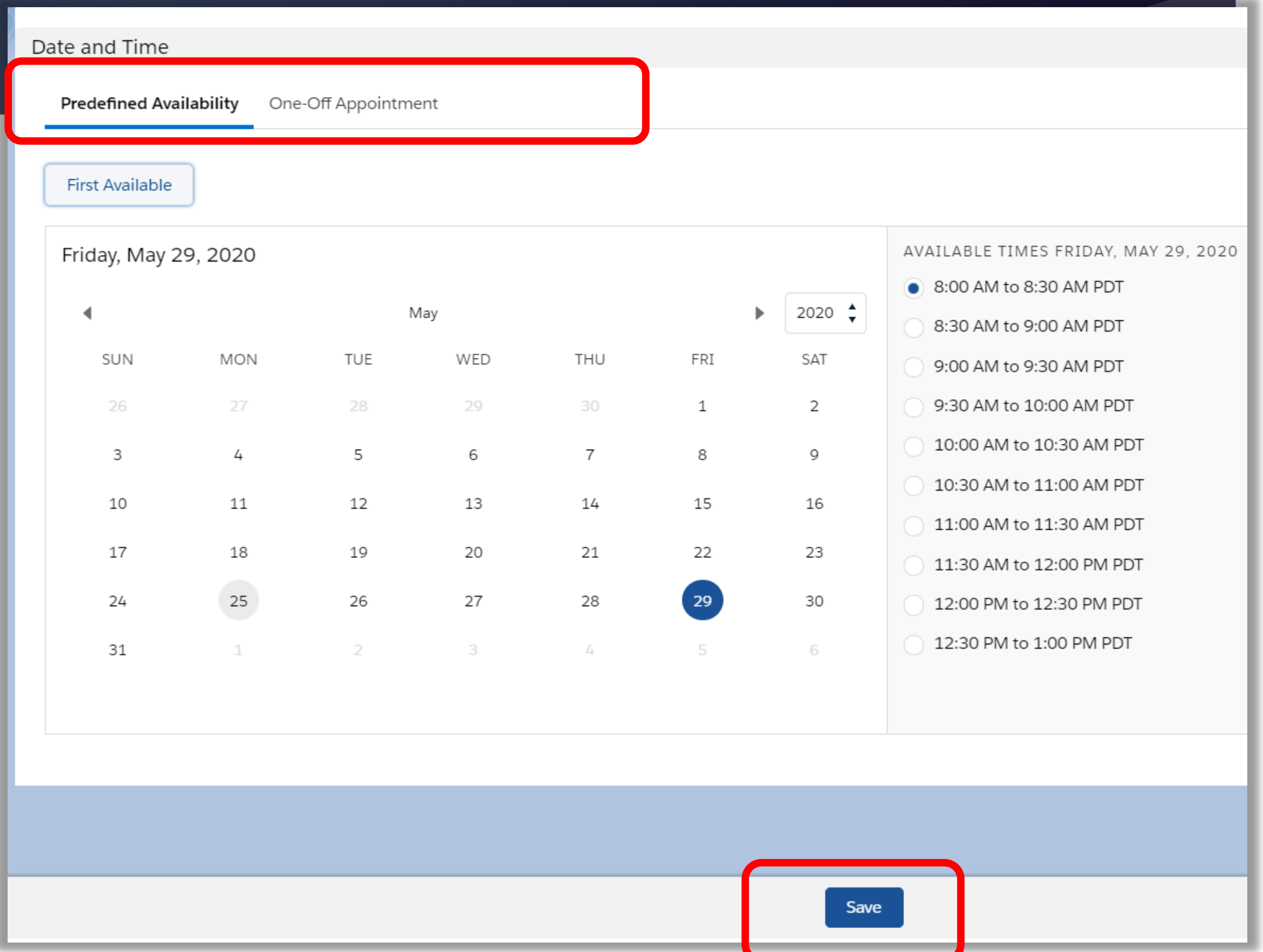
Third Party Scheduling

4) Select Predefined Availability or One-Off Appointment

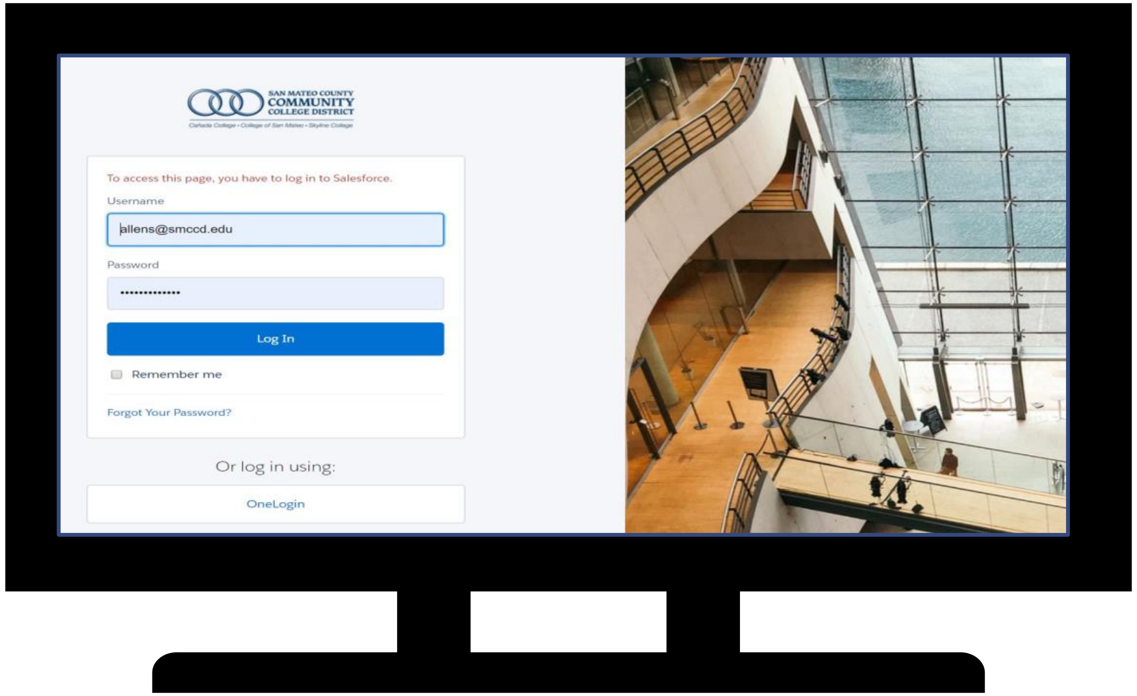
If you select Predefined Availability, you can select "First Available" to see upcoming times available

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

5) Click Save



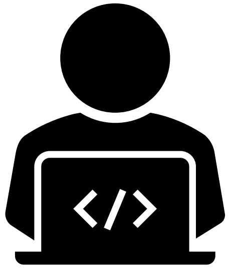
Demo Third Party Scheduling

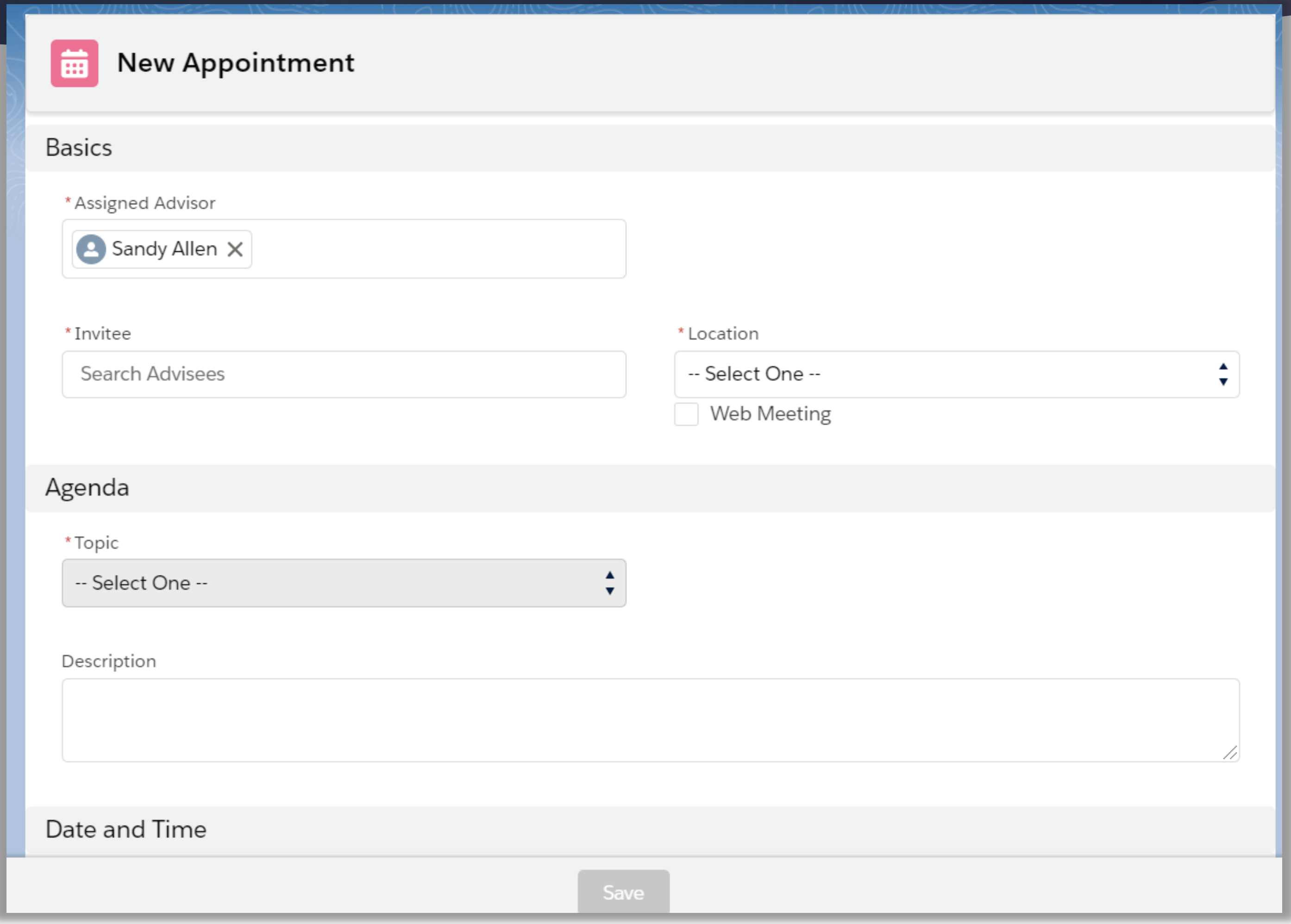


Activity#4 Schedule an Appointment for Someone Else

Review your Activity Guide for instructions (pg 5)

Questions? Ask Sandy and Steven!





Outlook Integration

Outlook Integration

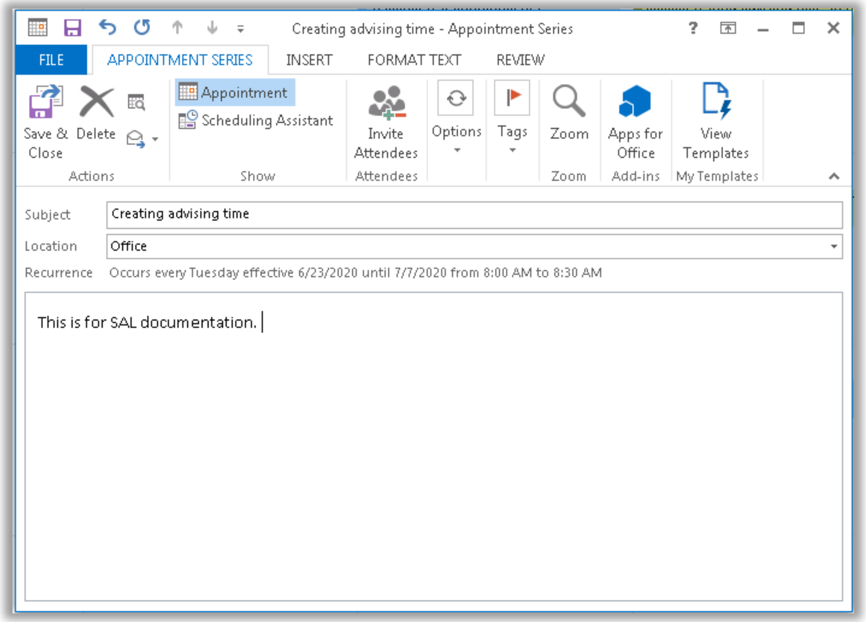
Riva is an Outlook Integration tool we are using to sync Student Success Link counseling appointments to Outlook.

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

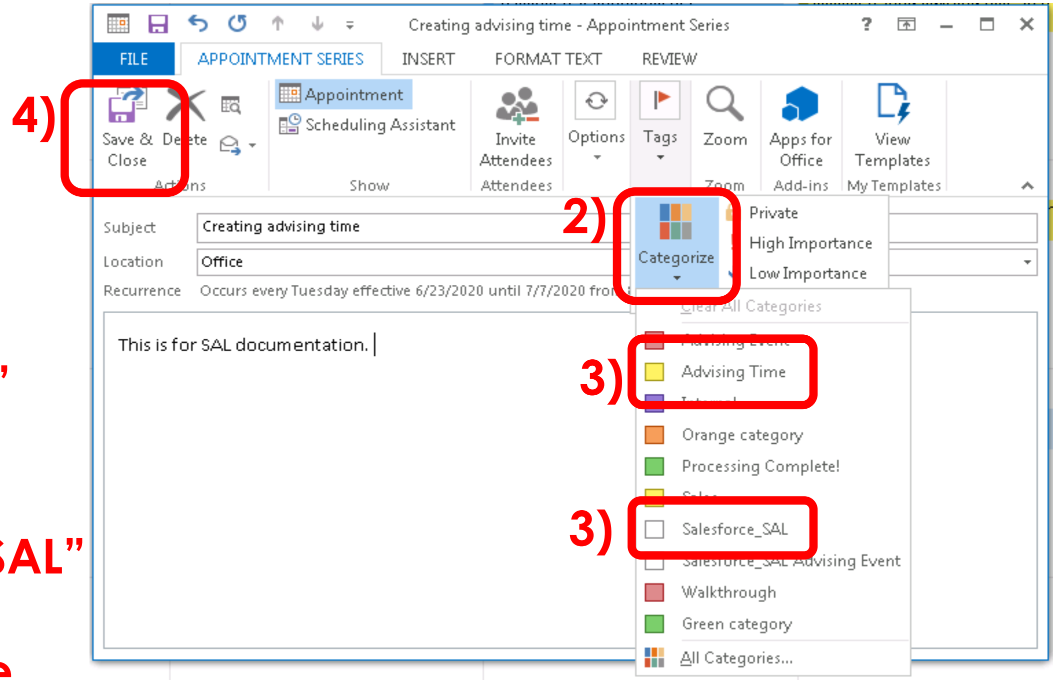
1) To create additional Counseling Time in Outlook, create a normal Outlook Appointment with the time you want to indicate as time available for counseling.



2) Click "Categorize"

3) Select "Advising Time" &"Salesforce_SAL"

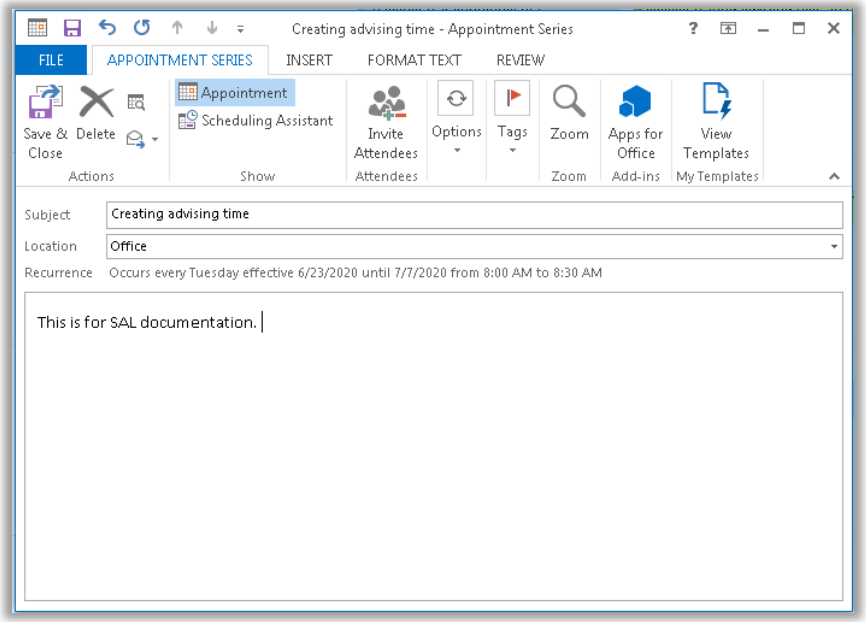
4) Click Save & Close



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

Outlook Integration: Non Counseling Time

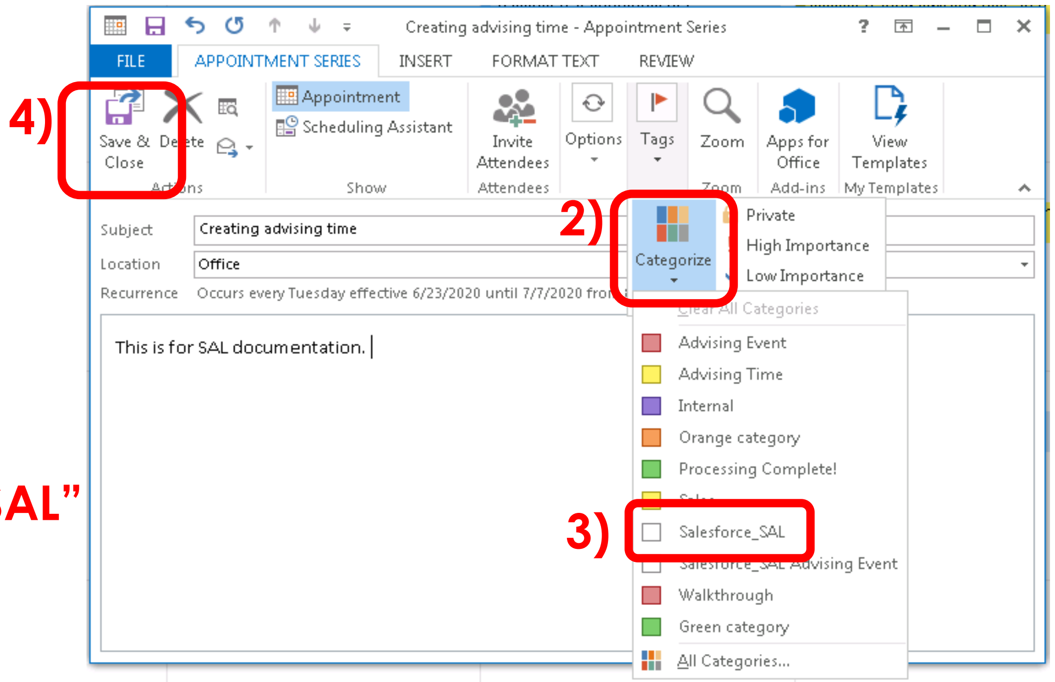
1) To create Non Counseling time in Outlook, create a normal Outlook Appointment with the time you want to indicate as time available for counseling.



2) Click "Categorize"

3) Select "Salesforce_SAL"

4) Click Save & Close



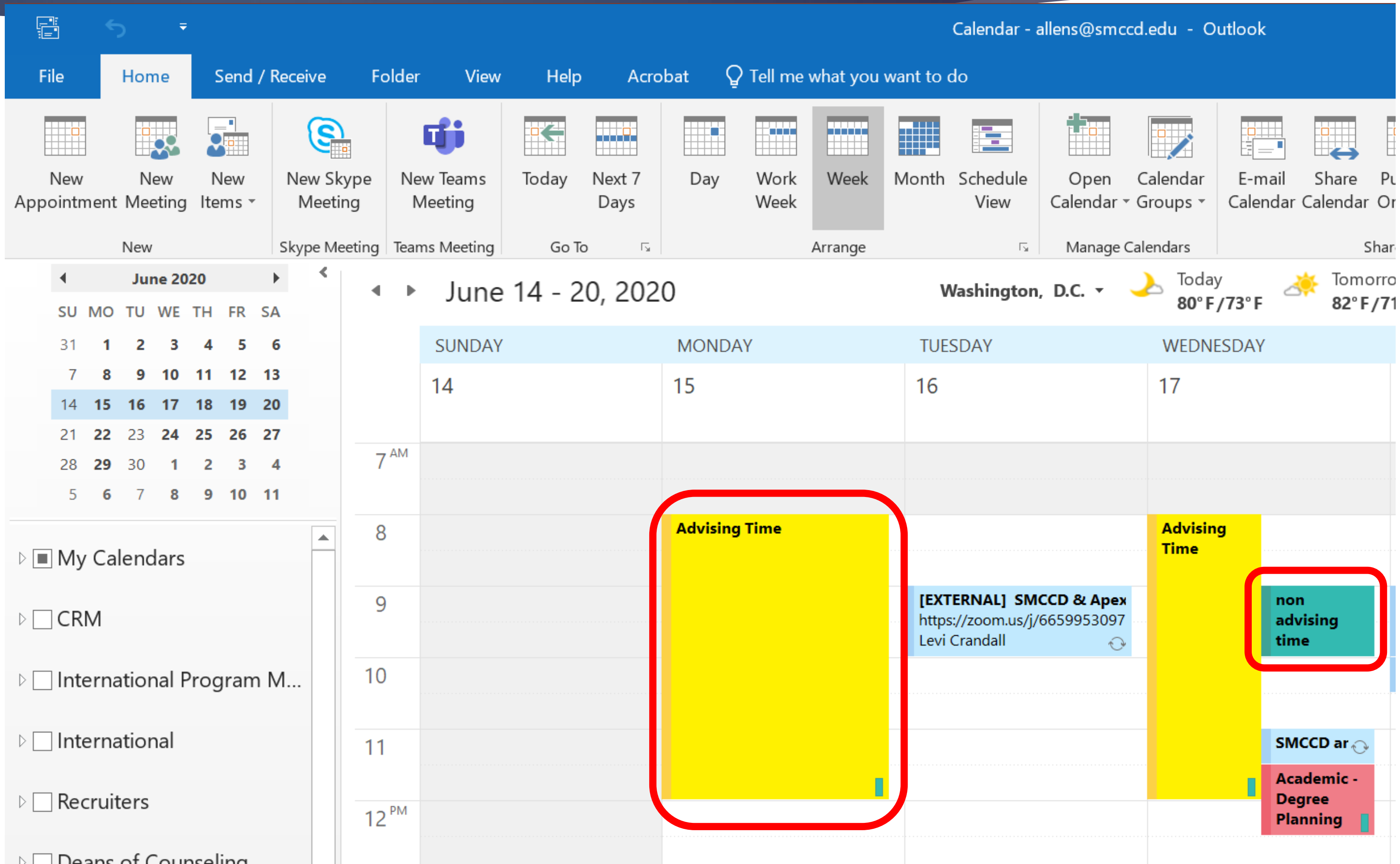
Note - If this is a recurring series make sure to disable "All day event", or it won't sync.

Riva Example

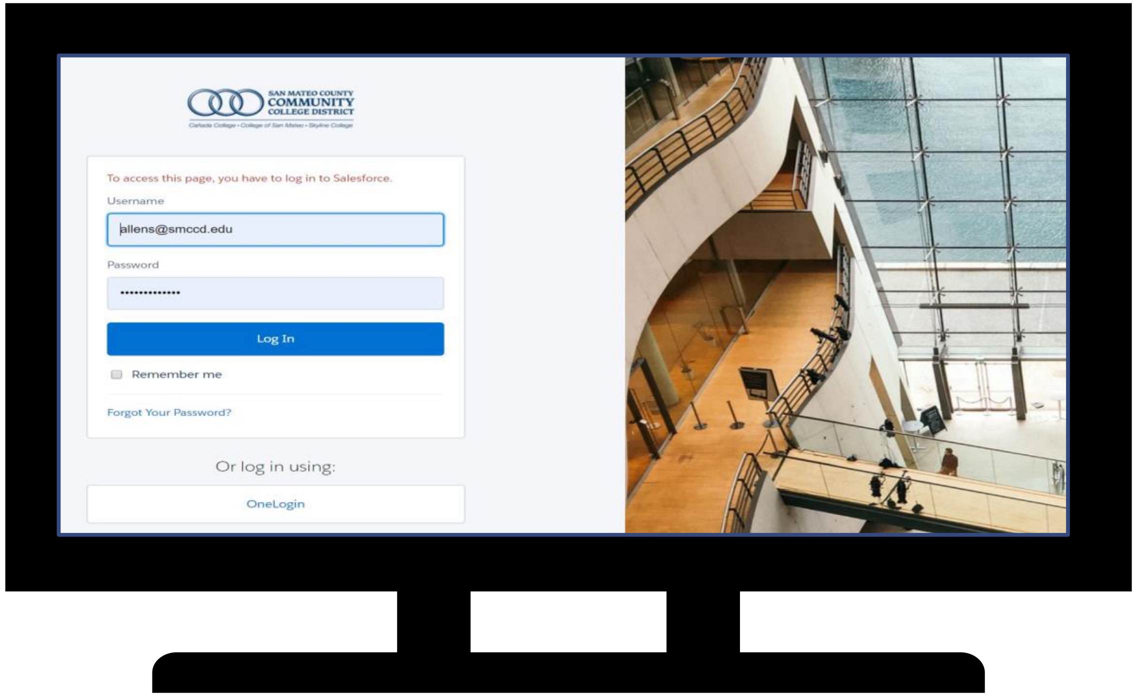
Yellow blocks = Counseling Time (Availability)

Green blocks = Non Counseling Events (Not Available)

Red = Counseling Event (Appointment scheduled)



Demo Outlook Integration

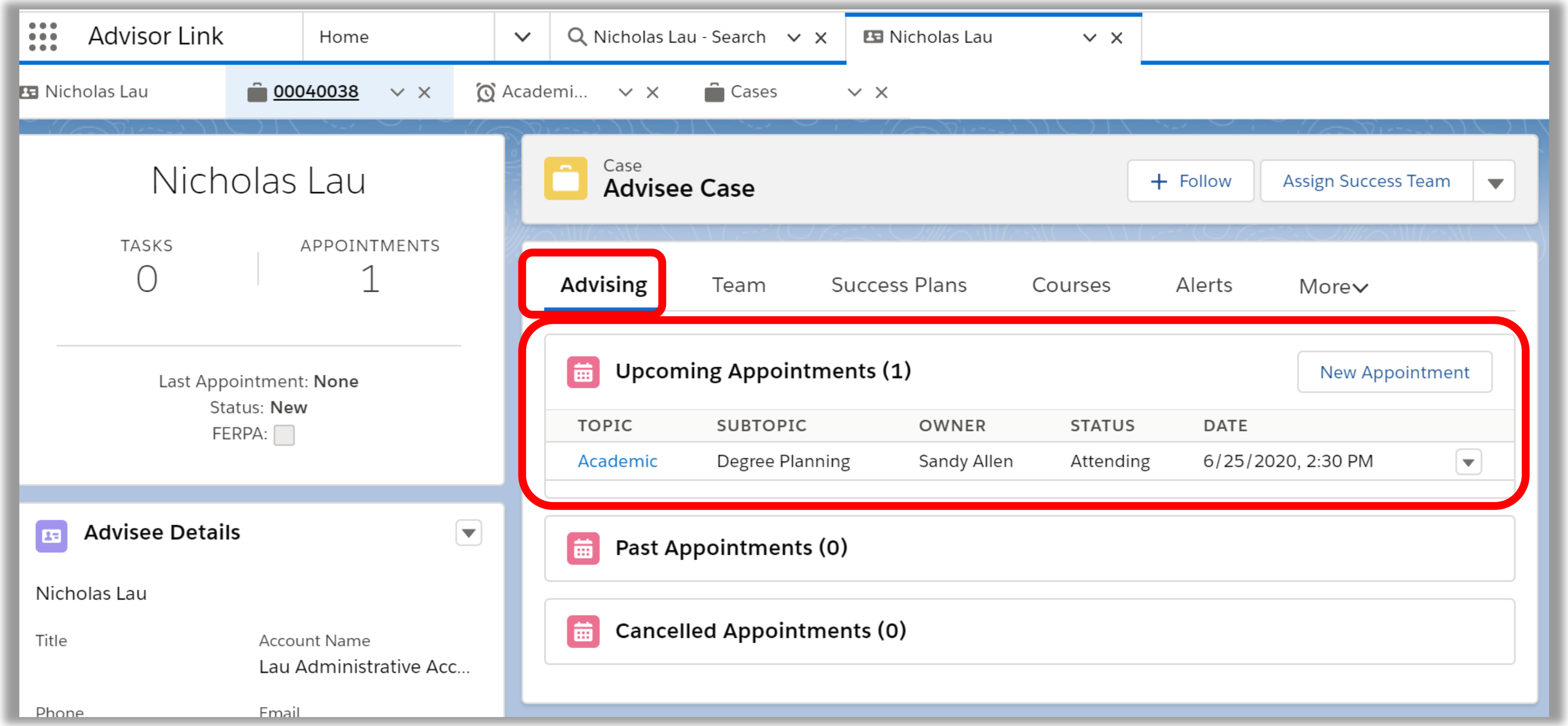


Editing Appointments

Editing Appointment

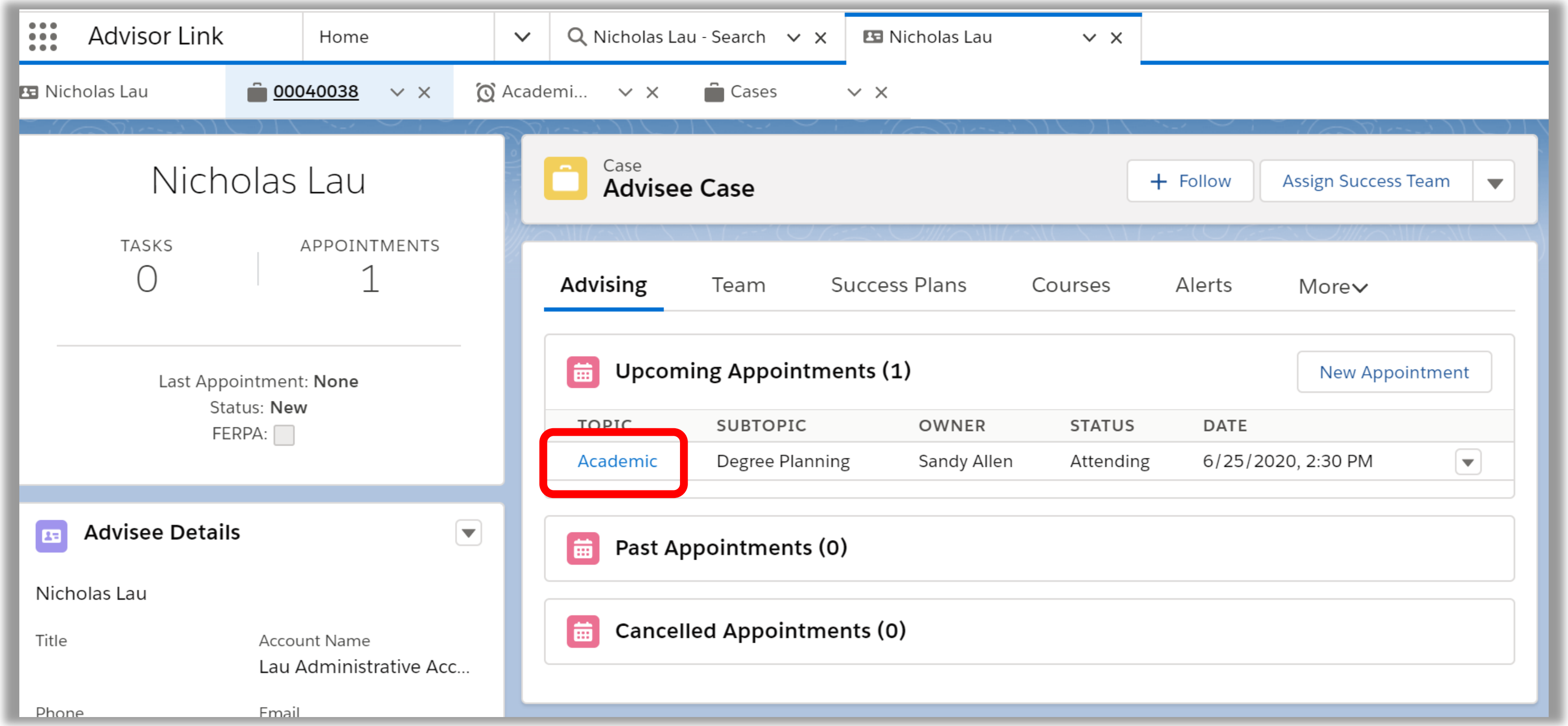
1) Locate the student Case Record and view their upcoming appointments listed under "Advising"

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



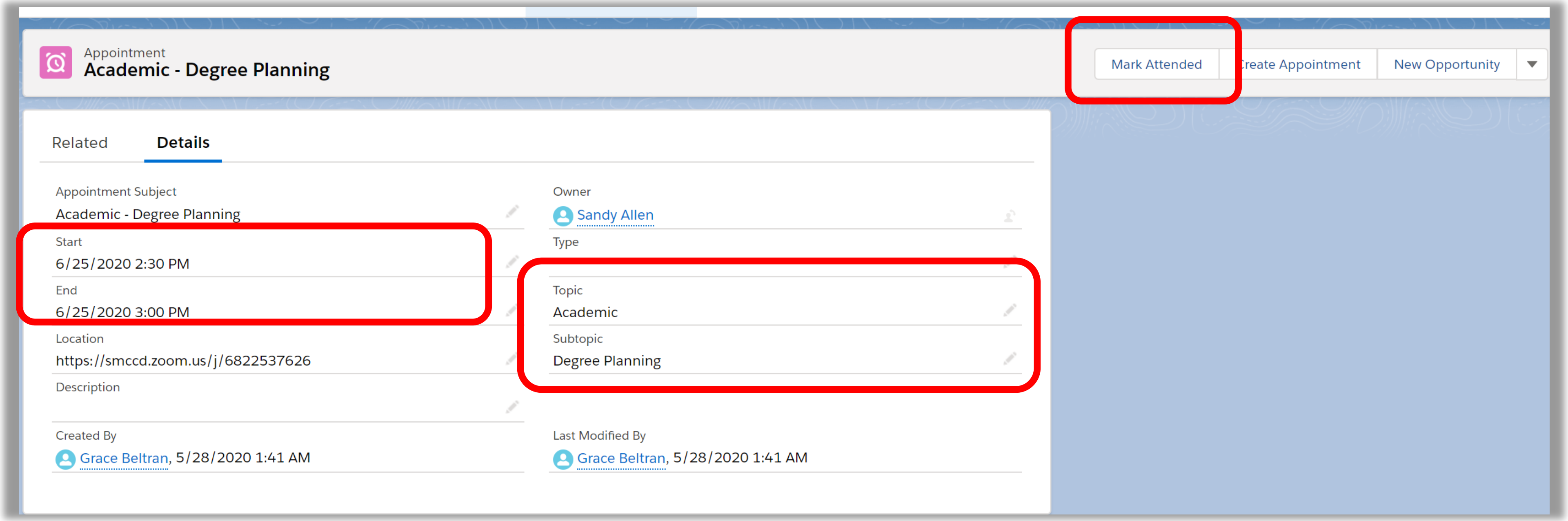
Editing Appointment

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

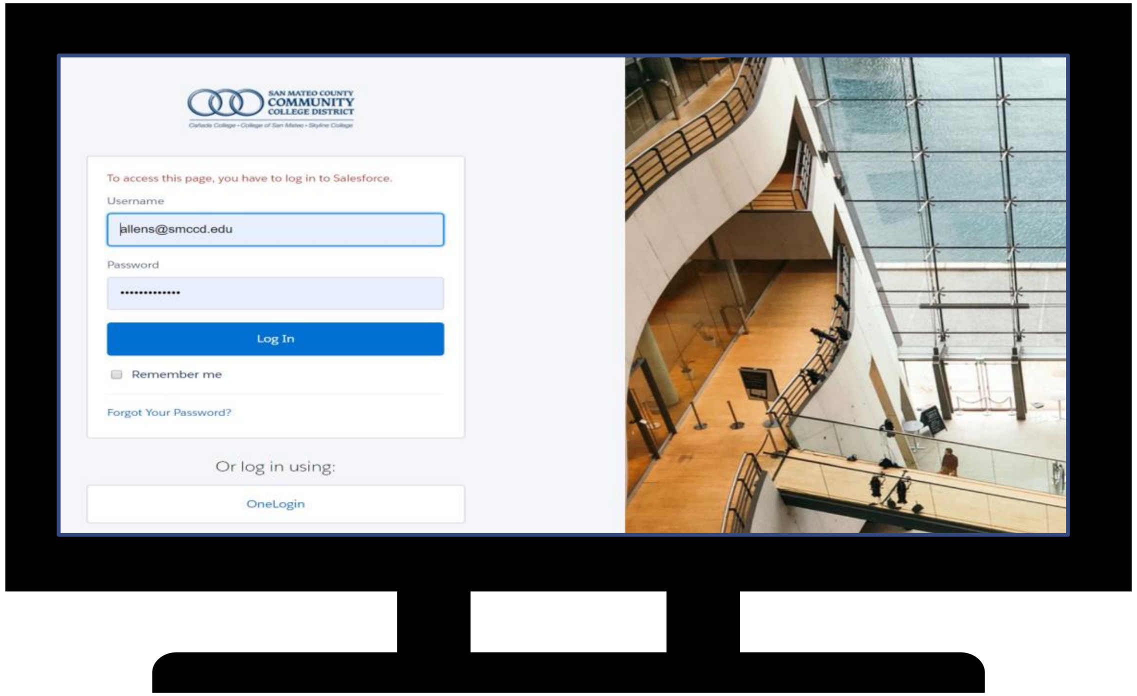


Editing Appointment

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



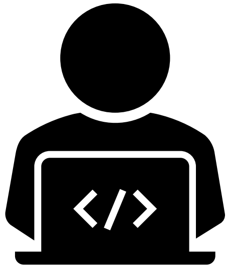
Demo Editing Appointments

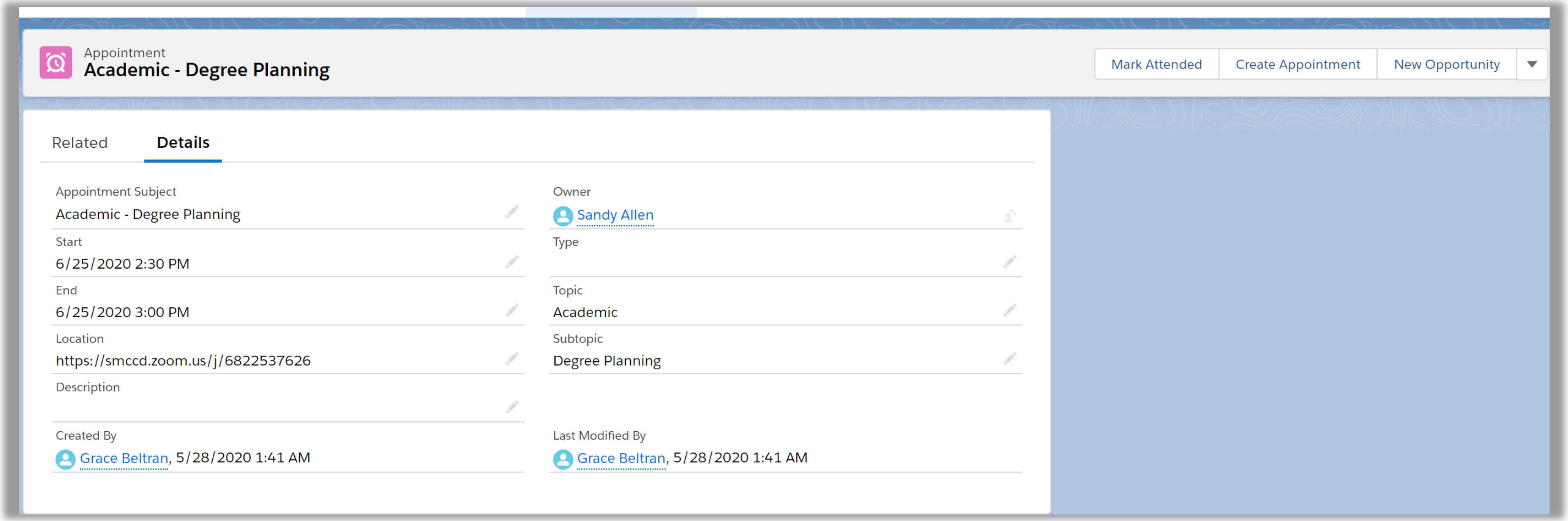


Activity#5 Update Appointment Status

Review your Activity Guide for instructions (pg 7)

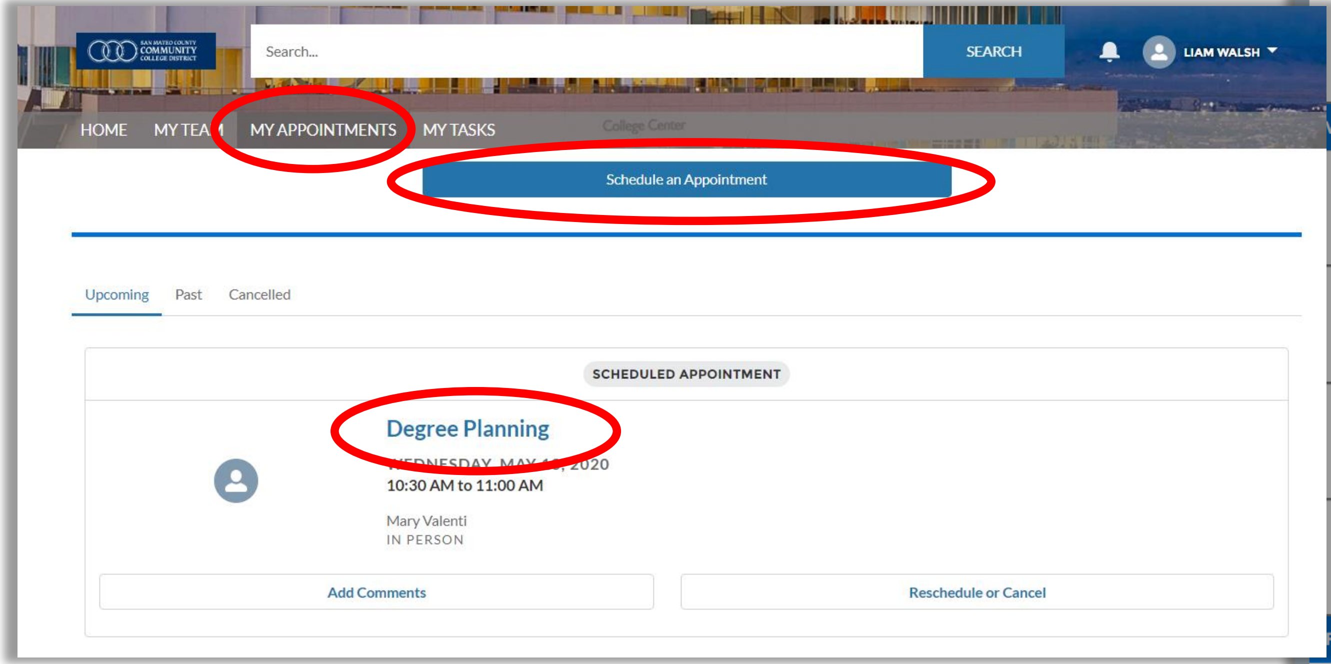
Questions? Ask Sandy and Steven!

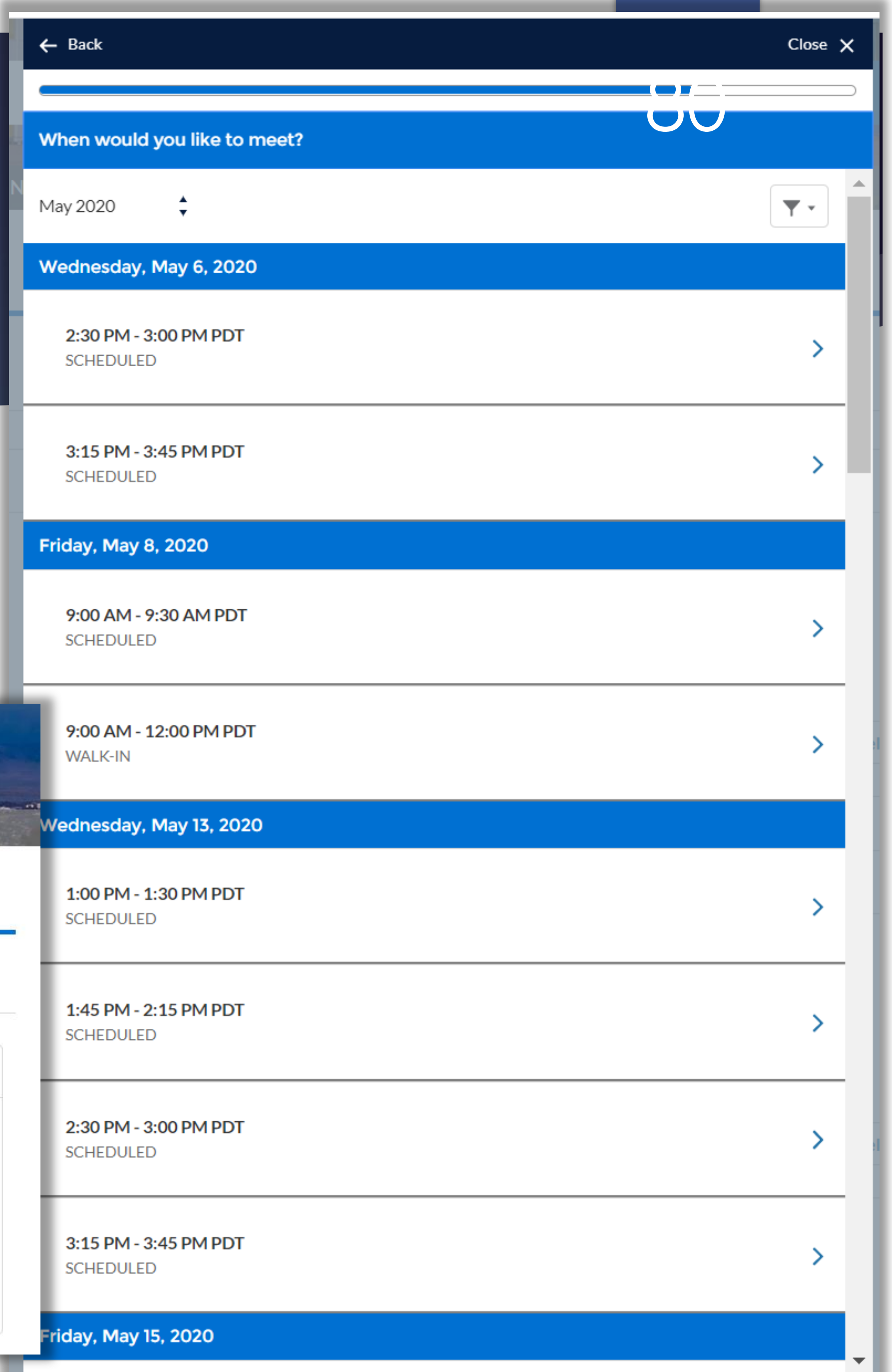




Student Success Link: My Appointments

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