



# Student Progress Reporting System

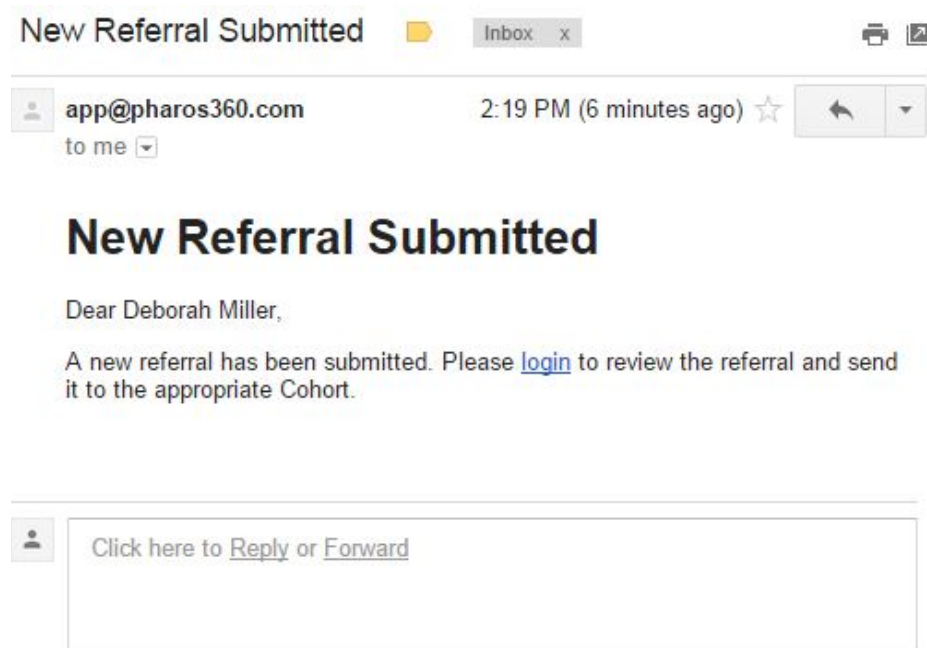
## Core User's Guide

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## 1. INTRODUCTION

Access to the data in BC Pharos 360 is determined by whether a user is a core user or a front-line user. Cohort managers and counselors are core users. They can view the data on the student information page, unless specific views are limited in the security matrix. An example of frontline users are faculty. A faculty member can see notes and any of the other materials that he/she completed for a student. At the top of your screen in the red horizontal bar, there are “tabs,” one for **Launchpad**, and to the right, **Settings**. If you have administration access, you will also see a tab for **Administration**. This guide will explain these first and then elaborate on how to use the system to manage your cohorts and log information on services provided to your students as well as pertinent interchanges among other BC staff and faculty who also work with your students to ensure academic success at BC.

### 1.1 Logging In the System and Logging Out

To log into the system, open your browser and enter the URL, [www.bc.edu/progress](http://www.bc.edu/progress), and use your BC username and password to log in. When you logout, please close your browser completely.

### 1.2 Access to the Videos

Please use this link to the help page that gives you links to the videos for the faculty showing how they will access and use the system, <http://www.bc.edu/offices/help/teaching/pharos360.html>.

## 2. LAUNCHPAD

### 2.1 Search for a Student

In the upper left-hand corner of the box next to the magnifying glass and the word, **Launchpad**, type a portion of the student’s name. All students with those names in the cohorts you manage will be



displayed. For example, if you type “Smith,” all students with a last name of Smith will appear in a list. If you hover over one of the names, a box containing quick links and actions that you can perform appears.

## 2.2 Feedback Requests and Surveys

To request information from the faculty or other care providers, use Feedback Requests and Surveys. If you are looking to gather information on an individual student, sending a **Feedback Request** is a great way to do so. You can request feedback from a faculty member or other campus partner directly from the Student Information Page. The **Request Feedback** link is found on the left side under **Collaborate**. Select the cohort (care area) where you would like their responses to be stored, the form you would like the recipient(s) to fill out and customize the message being sent. A link will be provided in the email, which will take the recipient directly to the feedback request. All requested feedback can be found when you hover over Launchpad (top-left corner) and select Feedback **Responses**. Here are pending and completed responses. You have the opportunity to review all responses before they are accepted and added to a student's record.

## 2.3 Student Update

If you are looking for information regarding a small group such as a single team, you might want to use the **Group Feedback Request** and load that group of students (ex. baseball team) into a Care Area specifically designed to work with those athletes. To send a Group Feedback request, go to

**Administration, Request Feedback.** This method will have you select a cohort from which to pull the list of students. You will then have the option to deselect some of the students and/or faculty recipients, if you need to. Once group feedback has been requested, you will be able to see all recent group feedback requests, the care area under which they were created, a short description, and when they were sent out. You can also export this information.

The request will present a view like the one below, listing the students for which information is requested.

The originator of the request or survey will receive an email notification. Pull down the menu options under **Launchpad**. Next to **Feedback Responses** is the number of responses the originator is waiting for.

Email notifications to the originator are batched every 10 minutes so that the originator's email box will not be cluttered with single email notifications.

## 2.4 Surveys

Surveys are a great way to cast a wide net and gather information about a large group of students. Many of our schools use the survey feature to gather mid-term grades, receive updates about students who are succeeding, surviving or struggling, and more. You can load surveys about all students, a select number of students or select specific classes. There are start and ending dates for this function. It is easy to export and share information received from surveys. You can also set up emails to notify faculty that their responses are needed or to remind them if they still have not completed all of their responses.

## 2.5 Survey Instructions



1. Create the Survey in Forms under the **Administration** drop-down menu. Go to the bottom of the page and Name and Describe the Survey. Select **Requesting Survey** from the drop down menu. Click on the +. Select the pencil icon to the right of the created survey to edit, create the questions, and save the completed survey.
2. Create the email template to announce the survey to the campus participants. Go to **Settings, global email template**. Click on **Create New Email Template** at the bottom of the screen. Save the template.
3. Request Pharos support to set the “campaign” to schedule and send campaign emails.
4. Load the survey by following the instructions below.
  - a. Go to **Surveys**. Under the **Administration** drop down menu at top select the green plus sign: New Survey at the top to load a new survey.
  - b. Complete Survey Options, on the left. Fill in the text boxes with the applicable information regarding name, cohort to report results and template to choose. Set start and end dates and times for the survey to be active.
  - c. Determine if the survey is for selected students only or for the entire campus. This can be done by loading, or copying and pasting ID numbers or by entering them into the text box to the left. (Typically survey is for ALL students so there would be no need limit to students.)
  - d. Select Courses. This is done by selecting specific courses or by selecting ALL to indicate the entire campus.
5. Click on **Load Survey** (green arrow), at the top right.

Using any of these methods, responses will be recorded in the students' logs.

The screenshot shows the 'Surveys' section of the Student Progress Reporting System. On the left, a sidebar titled 'Student Progress Report' lists three cohorts: 'ART120-01 - Art I' (5 students), 'ART121-01 - Art I' (4 students), and 'ART321-01 - Adv Sculpture' (9 students). The 'ART120-01 - Art I' cohort is selected. The main panel displays a list of students for this cohort, each with a checkbox for selection. The students listed are: Olivia Marie Edgerton, Faustina Anne Hicks, Alan Leroy Roman, Shawna (Nala) Nala Rose, and Amy Grace Towell. Above the list, there are buttons for 'Complete Survey' and 'No Updates'.

## MIDTERM FACULTY PROGRESS REPORT SURVEY

### 2.6 Send an Alert

To voluntarily send information on a student or make a referral, click on **SEND ALERT**. This allows you to report multiple concerns for a particular student. Once submitted, you will receive an email confirmation that the referral has been successfully submitted. The recipient can then add the student to a cohort by clicking on the Administration/Manager tab, selecting the appropriate cohort and then returning to the top of the page to click on mass upload and entering the Eagle ID of the student in the box.

Step 1: Click on **SEND ALERT**.

Step 2: Search for and select a student to refer.

Step 3. Complete the referral form, shown below. Decide whether you would like to be included to receive updates on this student regarding this referral. If you do, check the box next to ***I would like to receive progress updates regarding this student***, and include contact information on the right side of the form.

Launchpad Send Alert Search

Deborah Miller Settings Administration Logout Help Chat Now

Send Alert

Home / Send Alert

**Search for a Student to Refer** [\[edit\]](#)  
(available fields: primary login id, email, eagle # or name)

JAMAAL Search

Primary Login ID	Eagle #	Student Name	Student Email	Actions
9999999	fake_student	Jamaal Burger Williamson	jamaal@pharosresources.com	<a href="#">Send Alert</a>

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Step 3. Complete the referral form, shown below. Decide whether you would like to be included to receive updates on this student regarding this referral. If you do, check the box next to ***I would like to receive progress updates regarding this student***, and include contact information on the right side of the form.

Launchpad Send Alert Search

Deborah Miller Settings Administration Logout Help Chat Now

New Referral

Home / New Referral

**Your Information (\* denotes required)**

Please provide the following information so that we can give you updates about the progress of this referral and understand your relationship to the student you are referring. We may contact you if we have further questions. Any information you provide in this referral may be shared with appropriate university staff under the restrictions set forth by FERPA.

[\[edit\]](#)

\* Phone Number: 444-444-4444


\* Department/Office: athletics

\* Relationship to Student: Faculty

[\[edit\]](#)

I would like to receive progress updates regarding this student: ☒

**Jamaal Williamson's Information** [View More](#)



Primary Login ID: 9999999 Eagle #: fake\_student

If you have contact information for this student that may not already be stored in the university's student information system, please click here to enter it.

[\[edit\]](#)

**Referral**

Listed below, you will find some common reasons for referring a student. Please select any/all of the reasons that describe your concerns about the student you are referring.

[\[edit\]](#)

Questions marked with \* are required.

Step 4. Complete the **Reason(s) for Referral** (optional), and include **Academic Concerns** if applicable (also optional), and most importantly, summarize your concerns in the text box provided. Click **Submit Referral**.

Launchpad Send Alert Search Deborah Miller Settings Administration Logout Help Chat Now

### New Referral

Home / New Referral

#### Referral

Listed below, you will find some common reasons for referring a student. Please select any/all of the reasons that describe your concerns about the student you are referring.

[\[edit\]](#)

Questions marked with \* are required.

1) Reason(s) for Referral:

2) Academic Concerns:

3) Please summarize your concerns. We will follow-up with the student on these concerns.

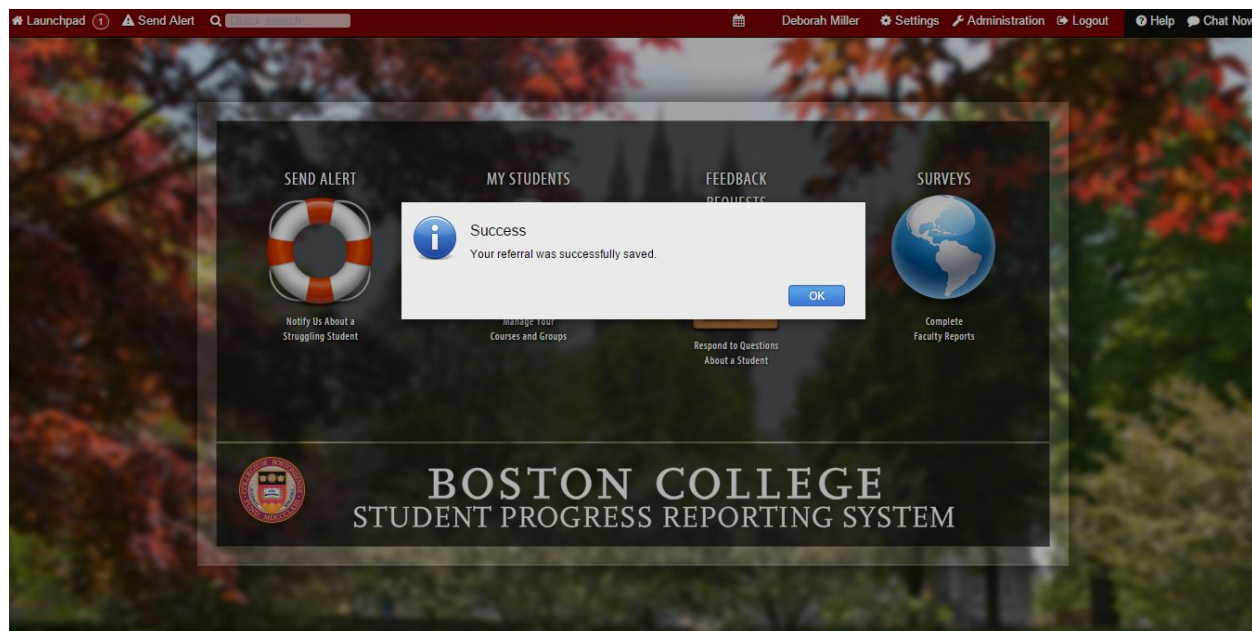
Thank you for taking the time to complete this form. We depend on your referrals to identify and support the students who need help.

[\[edit\]](#)

[Submit Referral](#)

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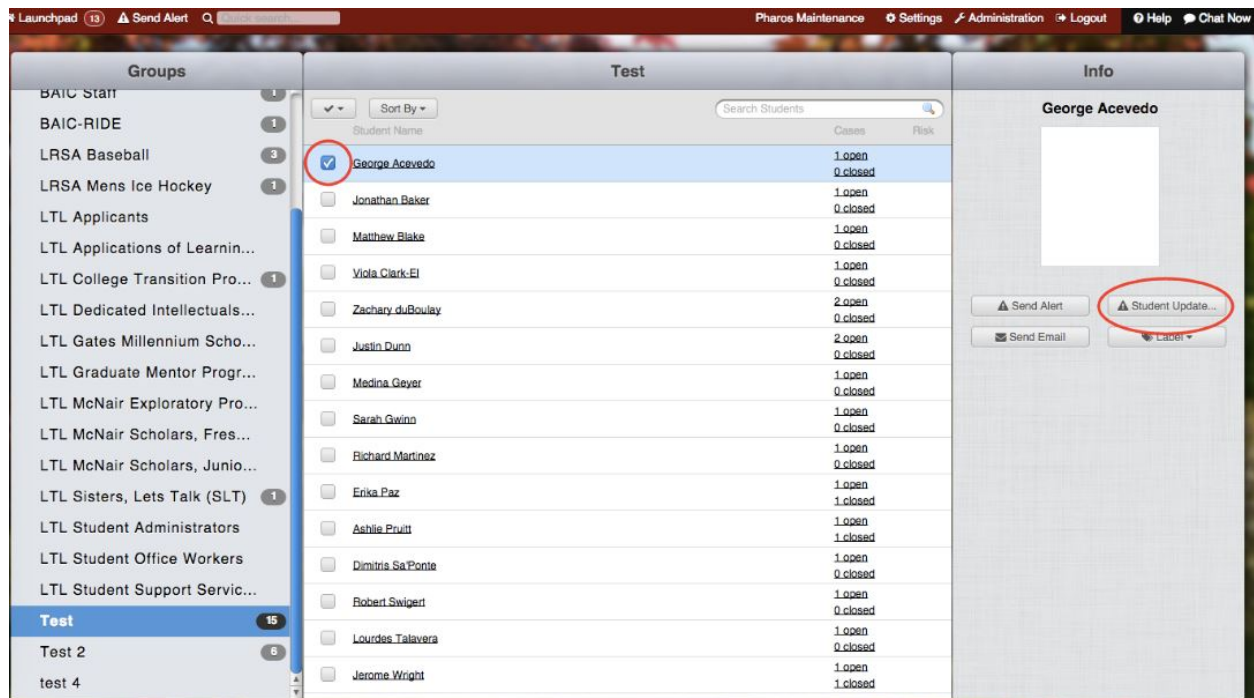
When you click on **Submit Referral**, the system will display a *Success* window. Click on **OK**.



## 2.7 View My Students

For a cohort manager, clicking on the icon, **MY STUDENTS**, results in displaying a list all of your cohorts and the students in each cohort that you actively manage. If there are other students related to this

cohort, whom you are no longer actively managing, then there is a relationship in Pharos 360. To create a relationship, refer to Section 8.0.



Please NOTE: If a case has not been opened for certain students in a cohort, those students' information will not be found on the **Manage Active Cases** or **My Students view**. If students have simply been uploaded as a group within a cohort, the list of students can be found under Administration/Management --> Care Areas (Cohorts). Once on the Cohort management page, simply select the cohort you wish to take a look at. Then click the "Mass Upload" link found underneath the list of authorized users.

On the next screen, you'll be given a list of all students who have been uploaded into the cohort. You'll have the option to clear this list or upload additional students.

You can also view the list of students uploaded as a group, and the users associated with that group, if instead you click on the "Email" link.

From the Manager or Administration tab, you can perform an export and get a list of all the students in that cohort.

## 2.8 Student Update



**Students Updates** is an extremely efficient holding place for all the forms that you might want to send about a student. You can specify whether you want the form to be sent only to the recipient, or to the recipient and the student.

The screenshot shows a web application interface with a red header bar containing navigation links: Launchpad (11), Send Alert, Quick search, Deborah Miller, Settings, Administration, Logout, and Help. Below the header is a modal window titled "Send Student Update" with a "Close" button and an "Open in New Window" button. Inside the modal, a message says "Please choose a form below to get started." Below this message are four rectangular buttons, each with a clipboard icon and a description:

- Dean's Academic Referral Feedback**: To Be Used To Provide Feedback When A Dean's Academic Referral Is
- Teaching Assistant/Student**
- Counseling Services**: Request For Meeting With Student
- Disciplinary Referral**: Request For Meeting With Student

Here is an example of a form displayed when you click on **Dean's Academic Referral Feedback**.

The screenshot shows the same web application interface, but the modal window now displays the "DEAN'S ACADEMIC REFERRAL FEEDBACK" form. The form has a "Change Form" button on the left and a "Review Responses" button on the right. The form is titled "DEAN'S ACADEMIC REFERRAL FEEDBACK" and contains the following fields:

- George Acevedo**: Student name
- 63742634**: Student ID
- 1) Date of requested call or meeting**: Text input field
- 2) Time of requested call or meeting**: Text input field
- 3) Location of requested meeting (if applicable)**: Text input field
- 4) Questions**: Text input field

You can review edit your answers and click on **Submit Response** in the top right-hand corner of the screen.

Launchpad (11) Send Alert Quick search Deborah Miller Settings Administration Logout Help Ch

Close Send Student Update Open in New Window

Edit Responses Submit Responses

Please review your changes below to ensure their accuracy.

**George Acevedo**

Date of requested call or meeting: s

Time of requested call or meeting: s

Location of requested meeting (if applicable): s

Questions: s

Notes: s

## 2.9 Faculty View, My Students

If you are a faculty member, click on **MY STUDENTS** to display all of your classes (on the left) and the students who get academic support (on the right).



## 2.10 Cases

To get to what is referred to as **Home page** click on the **Launchpad** drop-down and select Cases. As a counselor/advisor, a list of all the students whom you manage and who have active cases is displayed.

Student	Last Updated	Author	Last Contact	Last Comment	Cohort	Assigned To	Risk	Status
Acevedo, George	23 hours ago	Adaline Mirabal-Camacho	3 days ago	3 days ago	Test	Adaline Mirabal-Camacho	○ N/A (None)	Actively Managing
Baker, Jonathan	20 days ago	Clare Morrison	20 days ago	20 days ago	Test	Clare Morrison	○ N/A (None)	
Bernard, Francisco	3 days ago	Andy Petigny	never	never	Test 2	Andy Petigny	○ N/A (None)	WAITING FOR RETREAT CONTRACT
Blake, Matthew	3 days ago	Dan Bunch	3 days ago	3 days ago	Test	Paula Grealish	○ N/A (None)	LTL: Waiting for Reply
Boateng, George	20 days ago	Dacia Gentilella	20 days ago	never	Test 2	Dacia Gentilella	○ N/A (None)	
Cangelosi, Austin	20 days ago	Patrice Bouzan	20 days ago	20 days ago	Test 2	Patrice Bouzan	○ N/A (None)	
Clark-EI, Viola	3 days ago	Dan Bunch	3 days ago	never	Test	Dan Bunch	○ N/A (None)	LTL: Waiting for Reply
Daley, Emilee	20 days ago	Amy Morgan	20 days ago	20 days ago	Test 2	Amy Morgan	○ N/A (None)	
duBoulay, Zachary	3 days ago	Deborah Miller	never	never	Test 2	Deborah Miller	○ N/A (None)	Actively Managing
duBoulay, Zachary	3 days ago	Deborah Miller	never	never	Test	Deborah Miller	○ N/A (None)	
Dunn, Justin	20 days ago	Kristina von Harten	20 days ago	20 days ago	Test	Kristina von Harten	○ N/A (None)	
Geyer, Medina	3 days ago	Chasneika Astacio	3 days ago	never	Test	Chasneika Astacio	○ N/A (None)	Actively Managing
Gwinn, Sarah	20 days ago	Anna Harris	20 days ago	20 days ago	Test	Anna Harris	○ N/A (None)	To set your Global Statuses, go to the Settings page
Martinez, Richard	2 days ago	Chasneika Astacio	3 days ago	never	Test	Rossanna Contreras	○ N/A (None)	Actively Managing
Paz, Erika	3 days ago	Ines Maturana Sendoya	never	3 days ago	Test	Ines Maturana Sendoya	○ N/A (None)	HAS NOT COME FOR ADVISING

You can sort by any column.

**Last Updated** is the last time a system entry was made.

**Last Contact** is the date of the last contact made with the student.

**Last Comment** is the last comment you entered.

Clicking on **Status** will cause a drop-down list of statuses defined by your office or defined for use by all the offices (global statuses) or those you defined that are more relevant to your workflows and your cohorts. Please go to Section 5.1 for instructions and conventions for defining the status.

If no status is entered then the entry in the case log is greyed out.

For the Student Progress Reporting System we are defining a case as an event or incident which has discrete steps to lead to resolution, and that there is a defined and well-understood resolution which, when achieved, allows the case to be closed.

## 3.0 BUILDING COHORTS

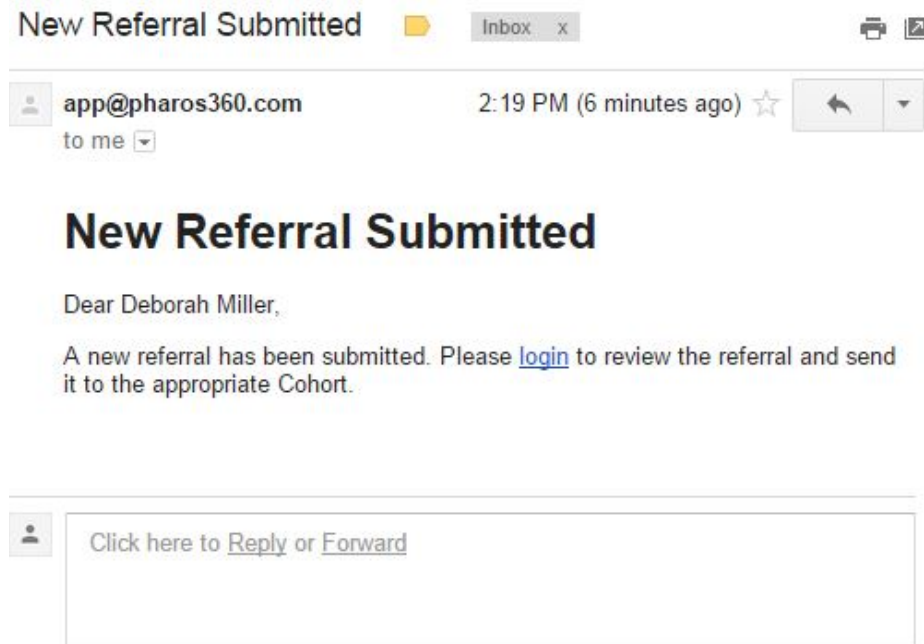
### 3.1 Making a Referral

After the initial load of the students in the cohorts defined for your office, to add a student into the system is to click on **SEND ALERT** for a student. Sometimes you will be referring a student to yourself, and sometimes you will be referring a student to another counselor in your office or to another office. Here are the steps. Section 2.6 contains the screen shots for sending an alert.

1. Next to **Launchpad** in the upper left-hand corner of the screen, click on **SEND ALERT**.
2. Enter the student's name.
3. If you entered just the last name of the student a list of students who match your criteria will appear.
4. Click on the student's name.
5. Fill in all the necessary information and submit the form.
6. This referral will now show up on the **Student Information** page.

### 3.2 Accepting a Referral

A referral will be sent in an email to you. It is best to have a plan in place about who receives the **SEND ALERT's** and assigns them to the counselors. If you are not that person, when a **New Referral** appears on



your **Home** page, you may choose to look at it, but you should not accept or assign it. If you are the designated acceptor of referrals:

1. Click on the name of the student.
2. Assign the student to a cohort.
3. Assign the student to a counselor/advisor.

### 3.3 Changing the Counselor/Advisor or Cohort for the Student

If you would like to change the counselor for a specific cohort, complete the following steps.

1. Click on the **Change** button to the right of the counselor's name.
2. This will take you to the change counselor/change Cohort screen.
3. Select a new Cohort from the drop-down menu
4. Select a new counselor from the drop-down menu. (Only counselors who are assigned to the Cohort you selected are displayed)
5. Enter the reason for the switch.
6. Fill in the time you spent on the switch.
7. Click on Change Counselor/cohort to make the change.
8. Click on Return to student to cancel the change.

### 3.4 Status Changes

The counselor assigned to the student in a specific Cohort manages these statuses.

### 3.5 Closing and Archiving a Specific Cohort

When you are ready to close a Cohort:

1. Click on the **Close** button on the right side of the screen, under the heading **Actions** to close and archive the case.
2. This will take you to the Close (Cohort) Case form.
3. Enter a **Resolution**. A resolution label can be any description you choose. The purpose of this label is to sum up the case.
4. Enter comments.
5. Fill in the **Time Spent** box.
6. Click on **Close Case** to close and archive the case.
7. Click on **Cancel Return to Student**, you will be taken back to the Student profile page and the Cohort case will remain open.

Please keep in mind that the resolution is one of the pieces of information that is part of the data that is exported Pharos 360. Therefore, it is very helpful to have agreed upon resolution statuses and operational definitions of what those statuses mean before starting your work with the students.

Examples of Resolution Labels:

- Resolved
- Unresolved
- Declared a Major
- Suspended
- Removed from Probation

### 3.6 Populating a Care Area with Students

#### 3.6.1 Adding Students to a Cohort

Cohort managers can continue to add students to an existing group of students in a cohort by copying and pasting those students' Eagle IDs. The new IDs will be added, and no existing students will be deleted.

Upload and Clear Students in Career C

Administration / Manage Support Areas / Upload and Clear Students in Career Counseling

Current Students

Name	Username
Alan Leroy Roman	Q1011
Alexis Sarah Bailey	Q1026
Jie (Jane) Jane Woo	Q1012
Todd Washington Robertson	Q1007

Clear Students

**Note:** This will erase all current student  
students in this Support Area.

Clear Students

Upload Students

The file that you upload (or copy/paste)  
Support Area, one per line with no other

Choose a file:

Choose File

 No file chosen

or

Copy/Paste:

Q1020

**Upload and Clear Students in C**

Administration / Manage Support Areas / Upload and Clear Students in Career Counseling

✓ Successfully uploaded students

**Current Students**

Name	Username
Alan Leroy Roman	Q1011
Alexandro (A.J.) Jamie Lopez	Q1020
Alexis Sarah Bailey	Q1026
Jie (Jane) Jane Woo	Q1012
Todd Washington Robertson	Q1007

**Clear Students**

**Note:** This will erase all current students in this Support Area.

Clear Students

**Upload Students**

The file that you upload (or copy/paste) will be added to the Support Area, one per line with

Choose a file:

Choose File No file chosen

**or**

Copy/Paste:

To completely clear out a cohort group, click on the **Clear Students** button (found above the upload students section on the **mass upload** page).

### 3.6.2 Using Mass Upload to Adding Students

Rather than entering each student's Eagle ID individually, you can click on **mass upload** from the Manager's or Administration's tab at the top of the home page.

Launchpad (1) Send Alert Quick search Deborah Miller Settings Administration Logout Help

### Manage Cohorts

Home / Administration / Manage Cohorts

**You must be the manager of the proper Cohort to access this page.** [hide this warning](#)

Cohorts		Users
Name	Email	* denotes a student
BAIC APHAM		
BAIC BHM		
BAIC CBI		

You can also mass upload a predefined list of students or email a particular group. Lock this Cohort so changes can only be made by you.

You can either select a file with the list of student Eagle IDs or you can copy and paste the IDs into the square under **Copy/Paste**. For either method, click on the box labeled, **Upload**, at the bottom of the screen. If these students are new and do not appear in other cohorts in the system, you can create a new case by clicking on the checkbox above **Upload**.

Launchpad (1) Send Alert Quick search Deborah Miller Settings Administration Logout Help

### Upload and Clear Students in

Administration / Manage Cohorts / Upload and Clear Students in

Current Students	
Name	Username

**Clear Students**

**Note:** This will erase all current students in the Cohort but will **not** close any currently open cases for those students in this Cohort.

[Clear Students](#)

**Upload Students**

The file that you upload (or copy/paste) should contain the user ids of the students that you wish to be in this Cohort, one per line with no other characters (commas, tabs, etc.).

Choose a file:

[Choose File](#) No file chosen

or

Copy/Paste:

### 3.7 Emailing a Cohort of Students

To email an entire cohort, please go to Management --> Care Areas (Cohorts). Once on this screen, you'll see the list of cohorts on the left. Next, select the cohort you wish to email.

The right-side will now be populated with the core users associate with this cohort. Underneath those users is text that says, "You can also mass upload a predefined list of students or email a particular group. Lock this Cohort so changes can only be made by you." If a cohort has already been uploaded, simply click on the "email" link. On the email page, you'll be given the option to email all core users associated with this cohort, all students loaded into this cohort, all faculty associated with this cohort or email all (core users, students and faculty). Once you click on the **Email Students** button, the email

screen will appear. You can select from a previously created template or create your own text. Please note the top blue box will alert you to which macros are available for use in this email.

For quick reference, you can access our Help Center article at anytime: <https://pharosresources.zendesk.com/hc/en-us/articles/203892545>

This feature is for the entire cohort. At this time you can only email the entire group.

For emailing individual students in a cohort, you can email each one quickly from the email icon next to his/her name, or you can use the Quick Search in the top-menu bar. If you use the Quick Search, hover over the name, then click on the email address.

---

## 4.0 STUDENT PROFILE PAGE

Any time you click on the name of a student, you will be taken to the Profile Page.

All of the information that is entered in this page is captured in a chronological log at the bottom of the page. The log can be word-searched.

### 4.1 Case Information

This section shows all open cases for the student, the date on which each was opened, the manager of that specific cohort, and the status assigned by the manager to that cohort.

### 4.2 Student Information Section

The **Student Information** page is where you as a counselor/advisor can perform the following:

- **Contact Student**
  - **Add Contact Info**, providing telephone, cellphone, address and email address
  - **Email Student**, using macros to insert each student's name in the Body of the email
- **Collaboration**
  - **Edit Circle of Care**. You can add others with whom you may want to share details about this student, or to send an email from the system. The **Circle of Care** lists all BC individuals, both staff and faculty, who provide services to the student. You can email any person in the list by clicking on the name. Go to Section 4.5 for detailed instructions.
  - **Request Feedback** is using a **Feedback Request** for information from another BC staff member or a faculty member. Go to Section 4.6 for detailed instructions.
  - **Report Progress** is sending a request for a report on the student's progress; the email body contains a link to a survey that you would like completed on this



student by the email recipients. An example is the *Midterm Faculty Progress Report*. Go to Section 4.7 for specific instructions.

- **Email Team**, go to Section 4.8 for specific instructions.
- **Case Management**
  - **Record Contact**, outlined in Section 4.9, is where you log all interactions with students including
    - Emails (to and from the student)
    - Advising meetings
    - Phone calls about student
  - **Record Note** are your notes which you can select to be viewed only by you that are about the student. Go to Section 4.10 for details.

All of the emails and information you have entered will appear in the log so that it is a permanent filter box. You can perform free-text searches on it. For example, if you search for the word “candy,” all entries with the word “candy” will be listed. It is a complete chronology of interactions and events about the student. No entry can be deleted, therefore careful consideration should be made on what is entered in the log, namely that is accurate and that it does not provide details that others in the student’s Circle of Care should not know. Also, keeping the emails in the system means these are kept confidential and more secure than if these were sent via Google email.

#### 4.3 Case Management

Just as a student can be in multiple cohorts and served by more than one of the offices that use the Student Progress Reporting System, there can be multiple cases open for a student. Guidelines for when to open a case are as follows:

1. If a program advisor is actively managing services for a student, then a case should be open for this student.
2. In addition, if there is an incident or event for which there will be follow-up steps that eventually lead to a resolution, a separate case should be opened that tracks the steps and is closed when it is resolved.

##### 4.3.1 Open a New Case

If you would like to open an additional case in a different cohort for this student:

1. Click on the **Open a New Case** button at the bottom left of the **Case Information** section.
2. This will take you to the Open New Case screen.
3. On this screen, you will see the Student Information on the left-hand side. Above it, click on **Open New Case**.

Launchpad (11) Send Alert Search Deborah Miller Settings Administration Logout Help

Open New Case

Home / Jonathan Baker / Open New Case

Jonathan Baker's Information		
Primary Login ID:	SIS #:	BAKERBI
71575560	Preferred Name:	Jonathan
Birth Date:	E-mail:	BAKERBI@BC.EDU
10/5/1995		
Home Phone:		

Open New Case	
Cohort:	[Dropdown]
Counselor/Advisor:	waiting for Cohort selection... [Dropdown]
Time Spent:	in minutes [Text]
Details:	[Text Area]
<input type="checkbox"/> I would like to share this case opening with other campus partners	
<input type="button" value="Open New Case"/>	

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4. From the drop-down box, select the new cohort under which to open the new case. (You may only open a case for cohorts to which you have access.)
5. Record the amount of time you have spent opening the case. Enter 0 if you do not wish to track time for programmatic dashboard reporting.
6. Type any details to be recorded in the student's log.
7. Click on the **Open New Case** button to take you back to the student's **Home** page.
8. On the student's **Home** page, you will be able to see a new case in the cohort you selected. This case is automatically assigned to you.

#### 4.3.2 Changing the Counselor/Advisor or Cohort for the Student

If you would like to change the counselor/advisor for a specific cohort or change the cohort:

1. Click on **Change** button to the right of the counselor/advisor's name.
2. This will take you to the change counselor/change cohort screen.
3. Select a new cohort from the drop-down menu.
4. Select a new counselor/advisor from the drop-down menu. (Only counselor/advisors who are assigned to the cohort you selected are displayed.)
5. Enter the reason for the switch.
6. Fill in the time you spent on the switch.
7. Click on Change Counselor/Advisor or Cohort to make the change.
8. Click on **Return to student** to cancel the change.

The **Student Information Page** also contains the data that was uploaded from BC about the student's demographics and academics. The **Show All** indicator displays all information. Alternatively, you can select what you want to see of the student's data.

Any files pertinent to the student can be uploaded and are visible on this page.

## Student Progress Reporting System

Launchpad 11 Send Alert Search

Deborah Miller Settings Administration Logout Help Chat N

George (George) Acevedo

Home / George (George) Acevedo

George (George) Acevedo

Contact Student

Add Contact Info

Email Student

Collaboration

Edit Circle of Care

Request Feedback

Report Progress

Email Team

Case Management

Record Contact

Record Note

Case Information

Cohort

Open Date

Counselor/Advisor

Status

Actions

Test	2014-12-08	Adaline Mirabal-Camacho <a href="#">change</a>	Actively Managing	<a href="#">close</a>
------	------------	--	-------------------	-----------------------

Open New Case

Student Information

Demographics

Primary Login ID	63742634
SIS #	ACEVEDOG
Preferred Name	George
Fullname	George Acevedo
Email	ACEVEDOG@BC.EDU
Birthdate	September 08, 1994 (9/8/1994)
Age	20
Currently Enrolled	Yes
Date of Birth	9/8/1994
GENDER	M
ETHNICITY	HISPANIC/LATINO
College Code	COLLEGE OF ARTS & SCIENCES
US Citizenship Code	1
Citizenship	US Citizen
Country of Birth	
Country of Residence	

Contact Information

Address

9 Wisner Road, Warwick NY 10990 (imported permanent [edit](#))

Email

ACEVEDOG@BC.EDU (imported email [edit](#))

Circle of Care

Name	Requests	Responses	Member Since	Opted-In to E-Mail
Dan Bunch	1	0	December 8th, 2014	<input checked="" type="checkbox"/>

Files

Filename

Uploaded

No files found.

Launchpad 11 Send Alert Search

Deborah Miller Settings Administration Logout Help Chat N

George (George) Acevedo

Home / George (George) Acevedo

Class Information

Class	Teachers	Hrs	Days	Start	End	Room	Type
CS27201_2015F - Computer Organization	Katherine Lowrie	3.00	MWF	12:00:00 PM	12:50:00 PM	FULTON HALL453	
CS27302_2015F - Computer Organization Lab	Katherine Lowrie	1.00	T	10:00:00 AM	12:30:00 PM	MALONEY HALL550	
MT25201_2015F - Discussion/MT202		0.00	T	1:00:00 PM	1:50:00 PM	GASSON HALL309	
CS24301_2015F - Logic and Computation	Sergio Alvarez	3.00	TR	1:30:00 PM	2:45:00 PM	FULTON HALL453	

Log Entries

Add Note

Record Contact

Email

Export

Actions	Text	Cohort	Type	Author	Date	Last Comment	Time
	Case Status Changed from 'Need to Follow up' to...	Test	Case Status Changed	Adaline Mirabal-Camacho	2014-12-10		0
	Case Status Changed from 'LTL: Waiting for Repl...	Test	Case Status Changed	Adaline Mirabal-Camacho	2014-12-08		0
	Feedback Requested: Faculty/Academic Advisor Au...	Test	Feedback Request	Adaline Mirabal-Camacho	2014-12-08		0
	Need to review course load prior to add/drop de...	Test	Note	Adaline Mirabal-Camacho	2014-12-08		2
	Test: we met to discuss courses for next semester.	Test	Contact - Meeting With Student	Adaline Mirabal-Camacho	2014-12-08		20
	To: Dan BunchDo not forget!George,I wanted to r...	Test	Contact - Email About Student	Adaline Mirabal-Camacho	2014-12-08		4

### 4.4 Email Student Instructions

Click on this action to send an email to a student through the system.

1. Click on **Email Student**, which will take you to a screen where you can enter in the necessary information.
2. Choose your template from the drop-down menu of all of the stored templates available in the system that will best fulfill your purpose. For more information about how to store email templates in the system, see **Section 5.0 SETTINGS**.
3. Once you choose your template, the subject line, and body of the email will appear in the box.
4. Edit the template that specifically fit your needs.
5. The system will automatically choose to send the email to the email address that the data management system has on record. If you wish to change that, you can choose "All known addresses" from the drop-down menu next to "TO:" on the screen. This will send the email to all the known addresses for that particular student.
6. Select the cohort under which you are working.
7. Record the time that you have spent on the email
8. Send the email.

Remember that if you have entered the placeholder **SIGNATURE** in the template email, it will automatically insert your signature in the email at the end of the body text. It is a good idea to have a "Blank" email stored in the system so that you can choose a template that already has your signature attached. For more information about how to set your signature, please go to **Section 5.0 SETTINGS**.

#### 4.5 Edit Circle of Care Instructions

This is the list of people who are included in the student's cohort. These include members who can view progress reports and elect to receive an email notification when progress reports are received.

When a person is added, you can see the name of the person, when they were added, any pending responses, and whether they are interested in receiving email updates on the student.

To add a cohort member (one at a time), here are the steps.

1. Click on the **Edit** button on the right of the **Circle of Care** heading. (This will take you to a page where you can see the current Circle of Care members and allow you to add another.)
2. You can add anyone with an Eagle ID to the student's cohort.
3. Enter the Eagle ID of the person you wish to add in the text box.
4. Click on **Add Selected Users to Circle of Care**.

#### 4.6 Request Feedback Instructions

To send a request to a student's instructors to give you information about how the student is doing in his or her class, you will click on this action. Be sure you have already added people to the student's Circle of Care. To do this, click on **Edit Circle of Care** under the **Collaboration** menu.

1. Click on **Request Feedback**.
2. Select the recipients for your **Feedback Request** from the column on the right.
3. Select the **Feedback Template**. This will assign the appropriate questions to your request.
4. From the drop-down box, choose the Cohort under which we will log your request and results.
5. Confirm your "Reply To" email address.
6. Write an email message or select an email template to send to the recipients. This email notifies the recipients that they should log in to the Student Progress Reporting System because you are requesting feedback from them.
7. Edit your subject line and message if necessary.
8. Click on **Send**.
9. The response to this request will show up on your Home page under the heading Responses.

#### 4.7 Report Progress Instructions

This action is distinct from the others in that anything that you write in this section of the profile will be available to be read by the student's Circle of Care. It is imperative that you are careful with the kind of information that you store in the report progress field.

1. Click on **Report Progress**.
2. This will take you to a screen with a text box for you to record your report.
3. Record the time that you have spent on the report.
4. Select the cohort under which you are working.
5. Write an email or select a template email to notify the cohort members that a new report has been created.

#### 4.8 Email Team Instructions

You can email a group of people here.

1. Select the recipients in the menu on the right.
2. Record the time you have spent on this task.
3. Select the Cohort under which you are sending this email.
4. Write an email or select a template email that you wish to send.
5. Click on **Send**.

#### 4.9 Record Contact Instructions

Any contact you have with or about the student should be recorded here.

1. Click on **Record Contact**.
2. Notice there is a **Keep Private** checkbox at the top of this screen. You can click on this box if you want to keep the information you record here confidential.
3. Choose the kind of contact you have had from the drop-down menu at the top of the screen. Be sure to distinguish the medium of the contact (meeting, phone call, voicemail, email) as well as whether it was contact made between you and the student OR contact you made with someone else *about* the student.
4. Type in the text box any case notes, homework, action items or reminders to yourself about the contact.
5. Select the cohort under which you are working.
6. Record the time that you have spent on the email.
7. Click on **Add Contact Report** to submit the contact record.

#### 4.10 Record Notes Instructions

Any notes that you would like to write to yourself, or other (future or present) counselors should be recorded with this action.

1. Click on **Record Note**.
2. This will take you to a screen with a text box for you to record your note.
3. Notice there is a **Keep Private** check box at the top of this screen. You can click on this box if you want to keep the information you record here confidential.
4. Select the **cohort** under which you are working.
5. Record the time that you have spent on the note.
6. Click on **Add Note** to submit the note record.

This is a good place to make comments on your progress of trying to contact and connect with the student, outside information that you want to be sure is preserved in the student's record, suggestions for how to contact this student in the future if needed, or notes on strategies to connect with the student.

#### 4.11 Closing and Archiving a Specific Cohort

When you are ready to close a Cohort:

1. Click on the **Close** button on the right side of the screen, under the heading **Actions** to close and archive the case.
2. This will take you to the Close (Cohort) Case form.

3. Enter a **Resolution**. A resolution label can be any description you choose. The purpose of this label is to sum up the case.
4. Enter comments.
5. Fill in the **Time Spent** box.
6. Click on **Close Case** to close and archive the case.
7. Click on **Cancel Return to Student**, you will be taken back to the Student profile page and the Cohort case will remain open.

Please keep in mind that the resolution is one of the pieces of information that is part of the data that is exported Pharos 360. Therefore, it is very helpful to have agreed upon resolution statuses and operational definitions of what those statuses mean before starting your work with the students.

Examples of Resolution Labels:

- Resolved
- Unresolved
- Declared a Major
- Suspended
- Removed from Probation

#### 4.12 Creating Surveys

In order to create the Midterm Progress Report (survey) within the system, we will simply need a list of all Eagle IDs that need to be a part of the survey population. They do not need to be pre-loaded into a cohort. However, they must be included in the overall student population uploaded in the `Student\_Data.csv` file.

The Eagle ID list will be pasted into the "Limit by Student ID" field upon survey creation. There is a "[How to Create a Survey](#)" Help Center article available that describes the process.

## **5.0 SETTINGS**

### 5.1 Global Settings

Global settings are defined by your administrator and can be used by any counselor for any of their cases. Global Statuses appear on the Student **Home** page (or **Student Information** page) as well as the **Search** page. Global Statuses are marked with an asterisk (\*) to clearly separate them from Personal Statuses.

BC Pharos 360 format for global statuses is [Program Office Acronym]-global status, where Program Office Acronym is LRSA,LTL, or BAIC.

Examples are *LRSA-Make Mandatory Tutoring Appointment*, *LTL-Awaiting Completed Application*, *BAIC-Add to Event Invitees*.

## 5.2 Personal Settings

Each individual user must create their own list of statuses that they can assign to their students' cases in order to keep track of the student's progress. These are "notes" designed to allow you and other users to view at a glance the next step in your interaction with the student. A student's status can be changed as often as is necessary. When a status is changed, it will create an entry in the log.

Add these statuses in the Settings Page under the heading Personal Status Setting by typing the status in the text box and clicking on the green "+". Clicking the red "-" button deletes the status.

Examples of Personal Statuses are given below:

- Waiting for a Reply
- Mid-semester Follow-Up Needed
- Finished for the Semester
- Daily Follow-up Needed
- Meeting with Regularly
- New Contact Information

## 5.3 Personal Email Signature

Each user will need to customize the signature to use to send with all of the emails from the system. The text entered in the box replaces the placeholder SIGNATURE in email templates sent by you to both faculty and students.

## 5.4 Global Email Templates

This feature allows you to store email templates and provides an easy way to generate emails. To create a new email, follow the steps below.

1. Click on the **Create New Email Template** button.
2. Under the heading, **Global Email Templates**, select the type of email you want to create.
  - i. Feedback/Survey: This is an email that you will send to your Circle of Care members to inform them that you have requested some information from them.
  - ii. General: These emails are general emails that you send to anyone on campus. Most of your emails will be stored here.
  - iii. Confirm: This is the email that you will send to a Frontline member who has submitted a referral on a student and this is your confirmation that you have received it.
  - iv. Report: This is the email that you will send to Circle of Care members to alert them that you have submitted a Progress Report on one of the students they are providing care for.
3. Create the description. This is the information you will see in the drop-down box when you are going to select which email to send, so it should clearly



4. Create the subject. This is the subject of the email that the recipient will receive.
5. Create the body of the email. Be sure to include any placeholders in the email that you would like to use. There is a list of these at the top of this screen in the blue box.
6. Click on **Save Template**.

This email will now be available to you any time an email is generated through Pharos 360. Store emails that you will use again. All counselors/advisors in Pharos 360 will have access to these emails and can create and save new email templates.

## 6.0 REPORTING

**Export Current Data** is the function that allows you to extract data from Pharos 360. The data will be exported as a comma separated value (.CSV) file. It can be automatically opened as a spreadsheet in Excel. Each extract pulls distinct information:

1. Student information is on the **Student Information Page**. Any of the information that BC has uploaded into the Pharos 360 system can be exported.
2. **Log Entries** is from **Student Information Page**. (“Export” appears to the right of the word, “Log Entries.”) This includes the following information:
  - a. Type of information logged
  - b. Author of information
  - c. Time spent completing a task
  - d. Cohort under which the counselor is working
3. **Student Contact Information** is from the **Student Information Page**. The report includes the following information:
  - a. Name
  - b. User ID
  - c. Date the information was collected
  - d. The author of the information
  - e. Cell phone
  - f. Telephone
  - g. Address
  - h. Email
4. **Closed Student Cases** provides information about the students who have closed cases. The report includes the following information:
  - a. Name
  - b. User ID
  - c. Author of information
  - d. Cohort
  - e. Result
  5. Circle of Care Members

## 7.0 ADMINISTRATION

In addition to your office's cohorts, you may create temporary cohorts such as a cohort for Students of Concern, another for Probation students, and a third for Advising Students. *Each student can have one open case and one counselor assigned per cohort.* All of the notes, contact, reports, statuses will be organized under the specific cohort in which the information was created.

To the far right on the screen, opposite the **Launchpad** view, is an **Administration** view. Under **Collaboration** column, it provides a place to view and add new cohorts, add and delete trusted users, change a trusted user's role (Administrator, Manager or Frontline User), email all trusted users, faculty and students represented in a specific cohort and mass upload a group of students. Click on **Manage Cohorts**. On the left-hand side of the page, you can see your list of current cohorts, and on the right side of the page you can see the list of trusted Users and their role assignments organized by cohort.

[Home](#) / [Administration](#)



### 7.1 Manage Cohorts

Click on **Manage Cohorts**. On the left-hand side of the page is list of your current cohorts, and on the right-hand side of the page is a list of trusted Users and their role assignments organized by cohort.

Cohorts		Users <small>* denotes a student</small>			
Name	Email	Name	Counselor/Advisor	Manager	
BAIC Benjamin Elijah Mays Mentoring Program		Pharos Maintenance (pharos.maintenance)	✗	✗	⊖
		Joana Maynard (78760967)	✓	✓	⊖
BAIC Celebration of Ethnic Heritage, Asian Pacific American Heritage Month		Andy Petigny (82230388)	✓	✓	⊖
		Ines Maturana Sendoya (35076824)	✓	✗	⊖
BAIC Celebration of Ethnic Heritage, Black History Month		<input type="text"/>			⊕
BAIC Celebration of Ethnic Heritage, Latino Heritage Month		You can also mass upload a predefined list of students or email a particular group. Lock this Cohort so changes can only be made by you.			
BAIC Celebration of Ethnic Heritage, Native American Heritage Month					

### 7.1.1 Adding a New Cohort

To add a new cohort, type the name of the new cohort in the box under the list of existing Cohorts, and click on the green “+” button.

If you would like to send mass emails from the cohort email address, instead of your personal email address, type the cohort email address in the second text box. For example, if I want to send Career Counseling emails from the Career Center email address(careers@university.edu) instead of your personal email address enter [careers@university.edu](mailto:careers@university.edu) in the text box. If nothing is entered into this box, all emails will come from the personal email of the user who is logged in.

To change the name of an existing cohort, **PLEASE NOTE** that BC Pharos 360 policy is the name of an existing cohort name cannot be altered once it is populated with students.

To delete a cohort, click on the red “-” button to the right of the cohort you wish to delete. Please note that deleting a cohort will remove all users and students associated with cohort. However, currently open cases will be accessible to the assigned counselor/advisor.

## 7.2 Manage Security

This page is only accessible to Administrators of the system. If you need to add a new administrator, change access to your data tabs, and change Search Criteria and Search Results.

### 7.2.1 Add a New Administrator

Enter the Eagle ID of the new Administrator in the box under the list of existing Administrators, and click the green “+” button.

### 7.2.2 Assign Privacy Options to the Data Tabs by Cohort

To the right of each cohort, across the top, you will see the data tab names (For example,

Demographics, Financial etc.) with a red “X” or a green check under each column heading. These icons signify that Cohort either does or does not have access to this Data Tab.

Click on the red “X” or the green check that is under the data tab column headings to change the current permission (approved or not approved) to the opposite permission.

Select the data tab name from the drop-down box on which you want general data about a student displayed.

### 7.2.3 Assign the Search Criteria Allowed for Each Role

View the specific information listed along the left-hand side, and the specific roles that are listed across the top. Click on the red “X” or the green check that is under the role column headings to change the current search or result access (approved or not approved) to the opposite permission.

### 7.2.4 Expanding Teaching Assistants’ Access Rights

As a student, teaching assistants have a limited view of the data on the student information page. To expand this view, add a teaching assistant as a counselor to a cohort (care area) and in the security matrix limit the view to exclude extended student academics, and demographics if desired.

## **8.0 RELATIONSHIP FILES**

There may be circumstances where a cohort extends beyond those students who are active BC undergrads, grads and Woods College students. There may be BC, State or Federal reporting requirements that mandate tracking and storing information on these students. In BC Pharos 360, relationships are used to connect, for statistical and reporting, data on these students with students in one of the Pharos 360 cohorts. The current cases is for McNair students and SSS students, where DOE reporting require data on active BC students for the current year and the preceding five years (McNair) and on active BC students for the current year and the preceding nine years.

Relationships are also a great way to group students with a common event or program (such as OTE). As a student requires intervention or services, the student can be moved to the appropriate cohort where he/she can be actively managed by a counselor/advisor.

Another way to view a relationship is that it is a view of everyone who has a connection in some way at this particular point in time. You can report on a relationship; you can analyze it; and you can survey the students in the relationship.

Here is an example of a relationship in Residential Life.

- a. Heading is Dorms
  - b. Category is Zaske Hall, Finer Hall, Loring Hall, etc.
  - c. Subcategory is East, West, North South.
1. The header line should always be included.
2. Because you send us a header line, the order of the columns does **not** matter. If it is more convenient to swap the order, please feel free to do so.
3. The **Member ID** column may be specified to inform us of the owner of the relationship. For advising, this would be the advisor. If left blank, owners are assumed to be anyone with a rank higher than 0 (see the **Rank** field below and the RAs file for an example).
4. The **Category** field gives a finer granularity to the relationship. An example is as follows:
  - a. Heading is Dorms
  - b. Category is Zaske Hall, Finer Hall, Loring Hall, etc.
  - c. Subcategory is East, West, North South.
5. The **Subcategory** field is optional, but can help separate relationships one step further.

**PLEASE NOTE:** Every time Category or Subcategory field change values, you must insert the Member ID and Role for the relevant advisors, even if they are the same for the prior list of students, as shown below for LTL SSS data.

6. The **Rank** field starts at 0 for the lowest level, and goes up from there to give a bit of a hierarchy. For the advisors file, all students (advisees) should be rank 0 and all faculty (advisors) should be rank 1. For a coaching file, the players would be rank 0 and the coaches would be rank 1 (or rank 2 if you distinguish between assistant coach and head coach).
7. The file names should all be `Extended_Data_Relationships_*.csv` where you can replace the \* with anything you want. You may also define all relationships in one file, however it may be easier to separate them out and allow us to concatenate them on our end.

Heading=	Category=	Subcategory=	Member ID=	Role=	Rank=
	Project Entry Date	Graduation Year	Eagle ID	Advisor or Student	0 or 1
SSS			987654432	Advisor	1
SSS			876125389	Advisor	1

SSS	9/1/2007	2011	415161718	Student A	0
SSS			987654432	Advisor	1
SSS			876125389	Advisor	1
SSS	9/1/2007	2012	101112131	Student B	0
SSS	9/1/2007	2012	415161718	Student C	0
SSS	9/1/2007	2012	192021222	Student D	0
			987654432	Advisor	1
			876125389	Advisor	1
SSS	9/1/2008	2012	425262728	Student E	0
SSS	9/1/2008	2012	930313233	Student F	0
SSS	9/1/2008	2012	435363738	Student G	0
SSS	9/1/2008	2012	394041424	Student H	0
			987654432	Advisor	1
			876125389	Advisor	1
SSS	9/1/2009	2013	445464748	Student I	0
SSS	9/1/2009	2013	495051525	Student J	0
SSS	9/1/2009	2013	354555657	Student K	0
SSS	9/1/2009	2013	585960616	Student L	0
SSS	9/1/2009	2013	263646566	Student M	0
SSS	9/1/2009	2013	768697071	Student N	0

Format reference: [http://docs.pharos360.com/Extended\\_Data\\_Relationships\\_%2A.csv](http://docs.pharos360.com/Extended_Data_Relationships_%2A.csv)

### Extended Data Relationships Advisors.csv

```
Heading|Category|Member ID|Role|Rank|Owner ID
Advising|My Advisees|3624985|Advisee|0|2102062
Advising|My Advisees|3662169|Advisee|0|2102062
Advising|My Advisees|4279193|Advisee|0|2102062
Advising|My Advisees|3922505|Advisee|0|2102062
...
```

### Extended Data Relationships RAs.csv

```
Heading|Category|Subcategory|Member ID|Role|Rank
Dorms|Zaske Hall|East|2102062|Resident Advisor|1
```

Dorms	Zaske Hall	East	3624985	Resident	0
Dorms	Zaske Hall	East	3662169	Resident	0
Dorms	Zaske Hall	East	4279193	Resident	0
Dorms	Zaske Hall	East	3922505	Resident	0
Dorms	Zaske Hall	West	4108945	Resident Advisor	1
Dorms	Zaske Hall	West	3396513	Resident	0

### 8.1 Caveats on Relationships and Cohorts

Relationships should contain those students who are related to a cohort, but who the cohort manager is not actively managing. (These can be students who transferred out of BC, who graduated, etc.,) In the case of BC, a student who is one in a relationship who can be moved to a cohort when he/she is going to be actively managed by a cohort manager/advisor/counselor. The converse is true as well. Students in the Relationship can be sent emails (individual or mass) and the data can be exported for statistics and reporting.

An example of a relationship is all students who attended OTE. When one of these students is needing services provided by BAIC, that student is moved to the appropriate cohort. Each student in a cohort need not have a case open. For example, if once in a cohort, the cohort manager wants to send the student an email, this may not warrant opening a case. If the student has a res life issue that BAIC is working with the student on, then a case would be open for something like this. Also, there can be more than one case open for a student.

## **9.0 BAIC COHORT MEMBERS SAFETY NET PROCESS**

When a student record is not part of the most recent nightly upload of BC data into BC Pharos 360, BAIC will email the student's Eagle ID and name to Student Services (Chris Cordell) and copying LTL Dan Bunch and Paula Grealish, BAIC will request that these students be coded LTL. This will result in the students being part of the data uploaded on the next night.

The person within LTL who is making the referral should be identified along with the BAIC person accepting the referral.

Once these students' data are in BC Pharos 360, LTL will make a referral in the BC Pharos 360 system to BAIC. BAIC will accept the referral and put each student in the appropriate BAIC cohort.

## **10.0 CREATING A LABEL AND FILTER FOR ALL STUDENT PROGRESS REPORTING EMAIL NOTIFICATION**

If you wish to keep the email notifications sent to you by the BC Pharos 360 under a separate label and skip having these send to your Gmail Inbox, please follow the steps below.

### 10.1 Creating a Label for Student Progress Reporting System Email Notifications

1. Select a message from Student Progress Reporting System.
2. Above the list of email messages, click on the **More** button.
3. Select **Filter messages like these** from the drop down menu.
4. Remove the email address in the **From** line.
5. Enter "Student Progress Reporting System" in the **Subject** line.
6. In the lower right hand corner, across from the blue magnifying glass box, click on **Create filter with this search**.

The screenshot shows the Gmail 'Create filter' dialog box. The search criteria are defined as follows:

- Filter:** subject:(Student Progress Reporting System)
- From:** (empty field)
- To:** (empty field)
- Subject:** Student Progress Reporting System
- Has the words:** (empty field)
- Doesn't have:** (empty field)
- Has attachment:** ☐
- Don't include chats:** ☐
- Size:** greater than
- Unit:** MB

A yellow button in the bottom right corner reads "Create filter with this search »".

### 10.2 Creating a Filter for this Label

1. In the lower right hand corner, across from the blue magnifying glass box, click on **Create filter with this search**.
2. Check box next to **Skip the Inbox (Archive it)**
3. Check box next to **Apply the label**.



4. Click on **Choose label** then select **New label**.
5. Name the new label (for example Pharos 360), then click **Create**.
6. Check **Also apply filter to matching conversations** to apply this filter to existing emails.
7. Click on blue box, **Create filter**

**BOSTON COLLEGE**

Mail ▾

**COMPOSE**

Inbox

Starred

Sent Mail

Drafts

Junk

Pharos 360

More ▾

Search people...

Deborah Miller

Deborah Miller

Nuno Couto

Nuno Couto

subject:(Student Progress Reporting System)

« back to search options

When a message arrives that matches this search:

☒ Skip the Inbox (Archive it)

☐ Mark as read

☐ Star it

☒ Apply the label: **Pharos 360**

☐ Forward it [add forwarding address](#)

☐ Delete it

☐ Never send it to Spam

☐ Always mark it as important

☐ Never mark it as important

☐ Categorize as: Choose category...

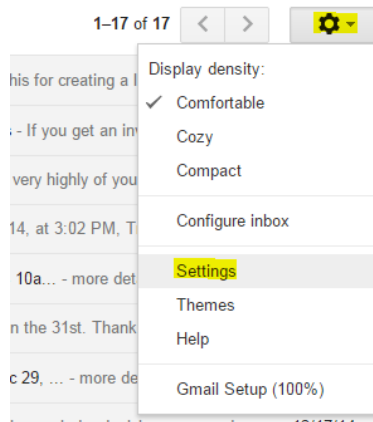
**Create filter** ☒ Also apply filter to 1 matching conversation.

[Learn more](#)

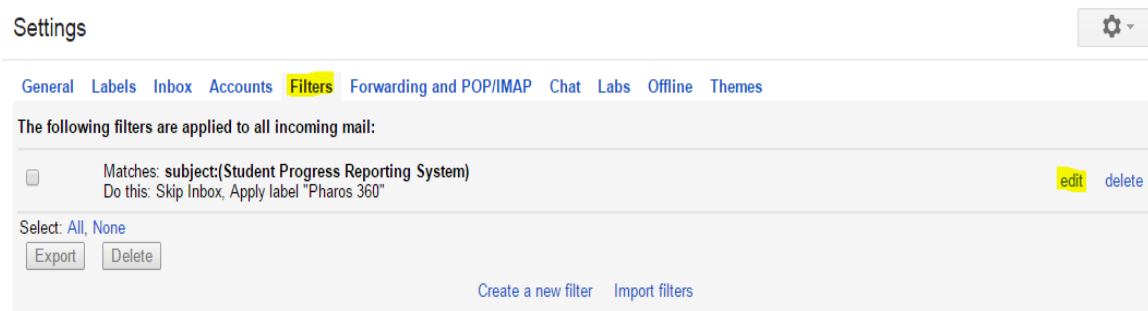
### 10.3 Editing the Filter

Here are the steps to change how the filter will select and apply rules to incoming emails. For example, you now want to filter incoming emails with a different subject line.

1. Click on **Settings icon** in upper right-hand corner of your Gmail email screen
2. In the drop-down menu, click on **Settings**.



3. In the top row in Settings, click on **Filters**.
4. Go to the correct filter and click on **edit** to the far right.



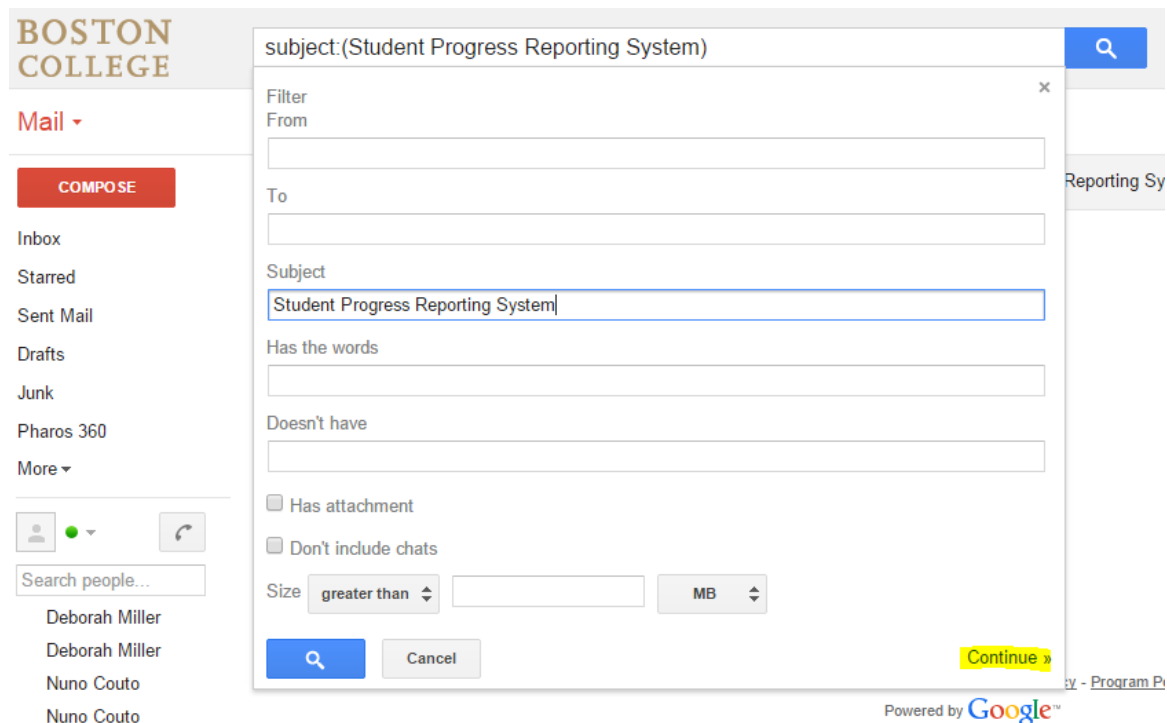
Using 0 GB

©2014 Google - [Terms of Service](#) - [Privacy Policy](#) - [Program Policies](#)

Powered by Google™

Last account activity: 4 minutes ago  
[Details](#)

5. Once you have entered a new subject, for example, click on **Continue** on the right opposite the blue magnifying box on the left.



**BOSTON COLLEGE**

Mail ▾

**COMPOSE**

Inbox

Starred

Sent Mail

Drafts

Junk

Pharos 360

More ▾

Search people...

Deborah Miller

Deborah Miller

Nuno Couto

Nuno Couto

subject:(Student Progress Reporting System)

Filter

From

To

Subject

Student Progress Reporting System

Has the words

Doesn't have

☐ Has attachment

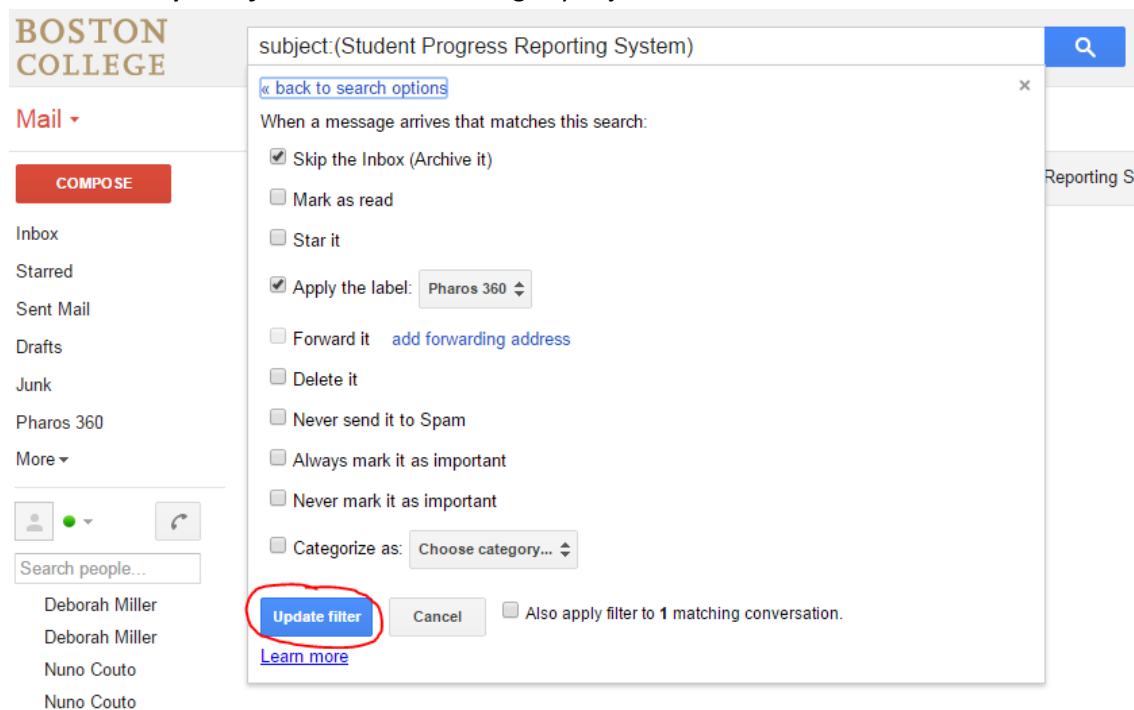
☐ Don't include chats

Size greater than MB

**Filter** Cancel Continue

Powered by Google™

6. Check boxes noted in Step 2 above (***Skip Inbox*** and ***Apply Label***).
7. Click on ***Update filter*** to save the changes you just made.



**BOSTON COLLEGE**

Mail ▾

**COMPOSE**

Inbox

Starred

Sent Mail

Drafts

Junk

Pharos 360

More ▾

Search people...

Deborah Miller

Deborah Miller

Nuno Couto

Nuno Couto

subject:(Student Progress Reporting System)

« back to search options

When a message arrives that matches this search:

☒ Skip the Inbox (Archive it)

☐ Mark as read

☐ Star it

☒ Apply the label: Pharos 360

☐ Forward it add forwarding address

☐ Delete it

☐ Never send it to Spam

☐ Always mark it as important

☐ Never mark it as important

☐ Categorize as: Choose category...

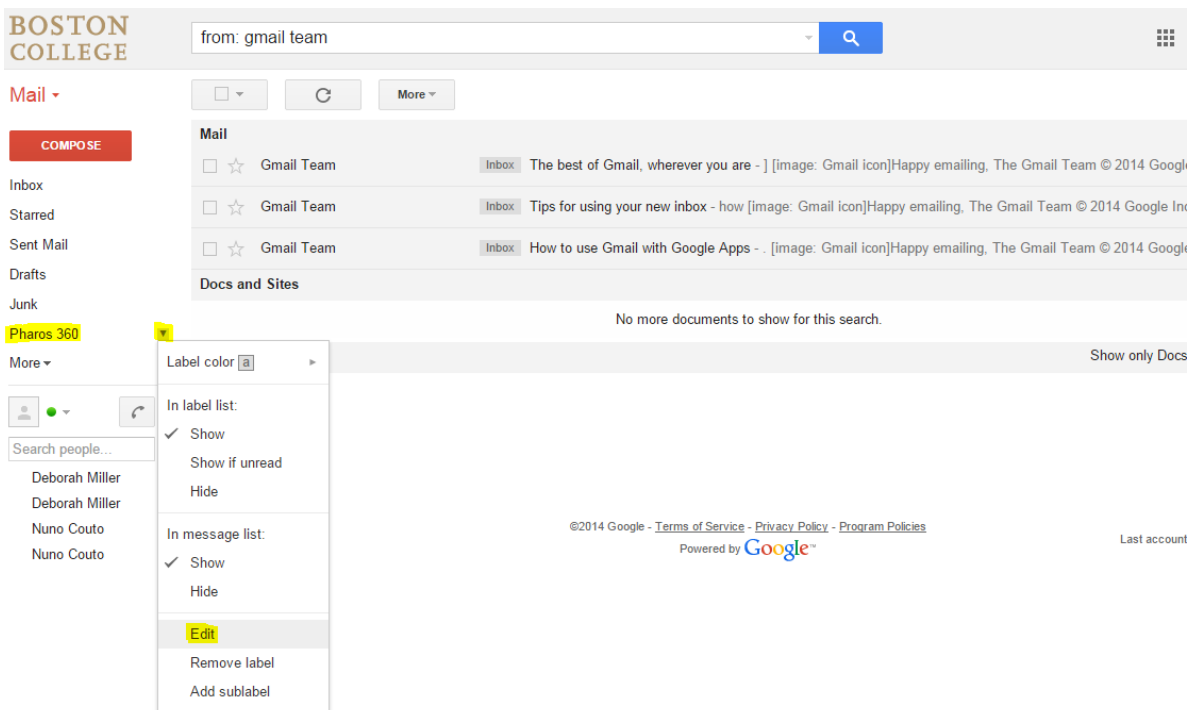
**Update filter** Cancel ☐ Also apply filter to 1 matching conversation.

[Learn more](#)

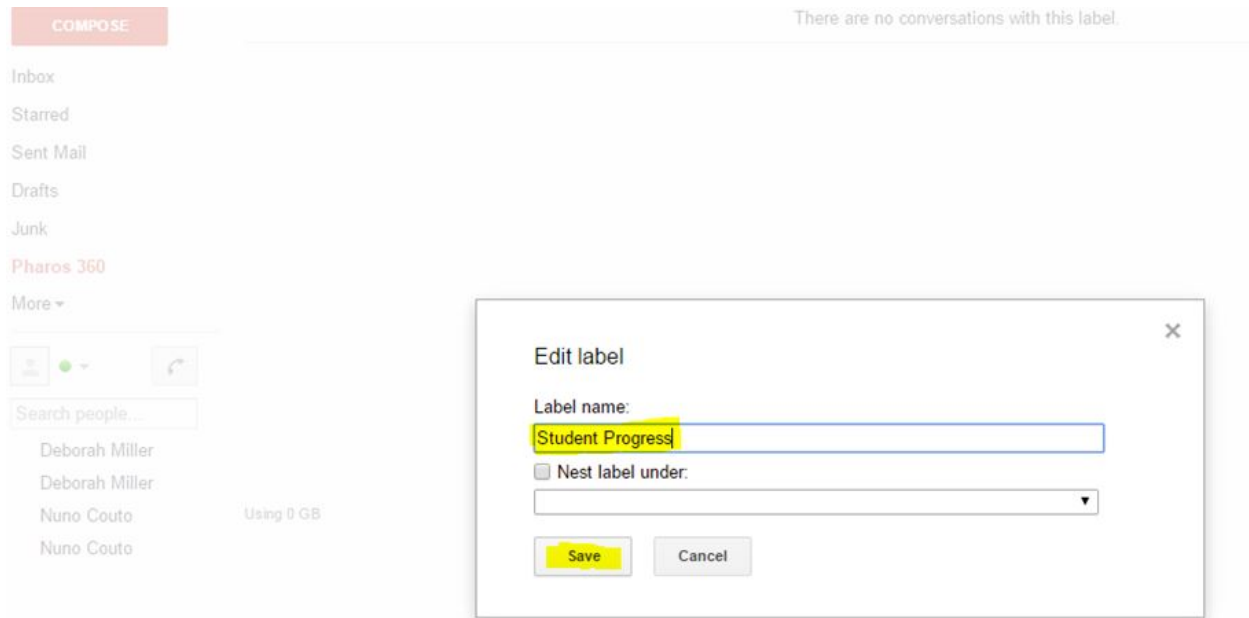
#### 10.4 Editing the label name

These are the steps to change the name of the label but still preserve the filter and all the emails associated with the label you are about to change. For example, you only want to change the label from “Pharos 360” to “Student Progress” but want to keep the same rules.

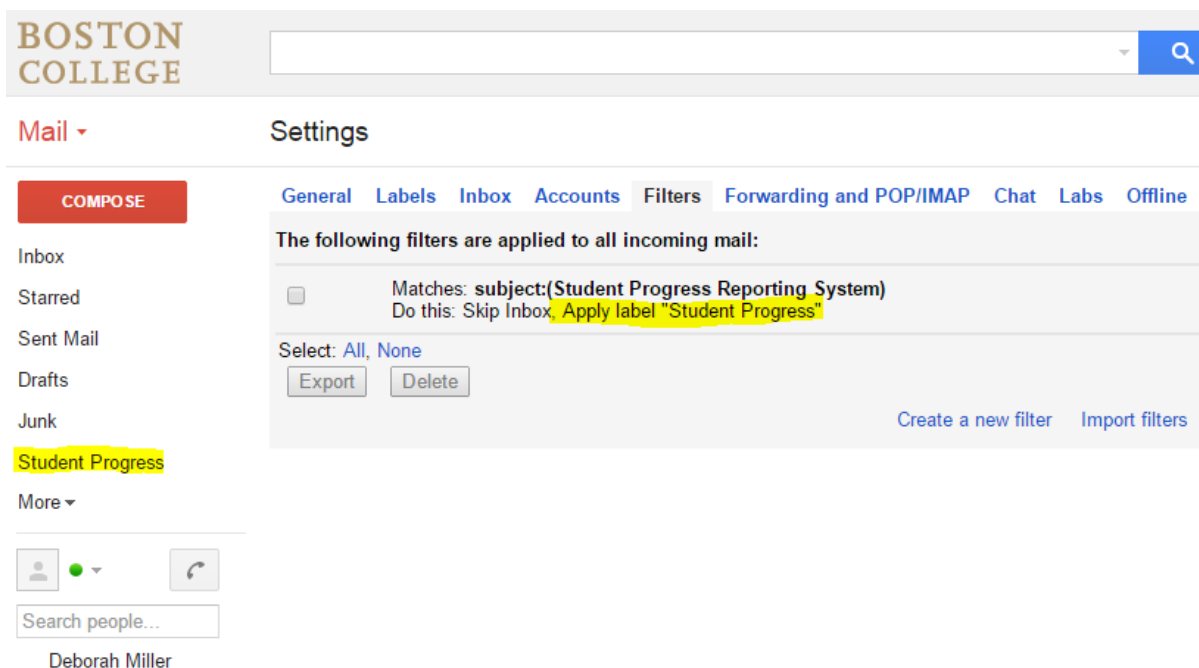
1. Go to the folder Pharos 360, click on the **arrow icon** to reveal the drop down menu, then select **Edit**.



2. Rename the label to **"Student Progress"**, then click **Save**.

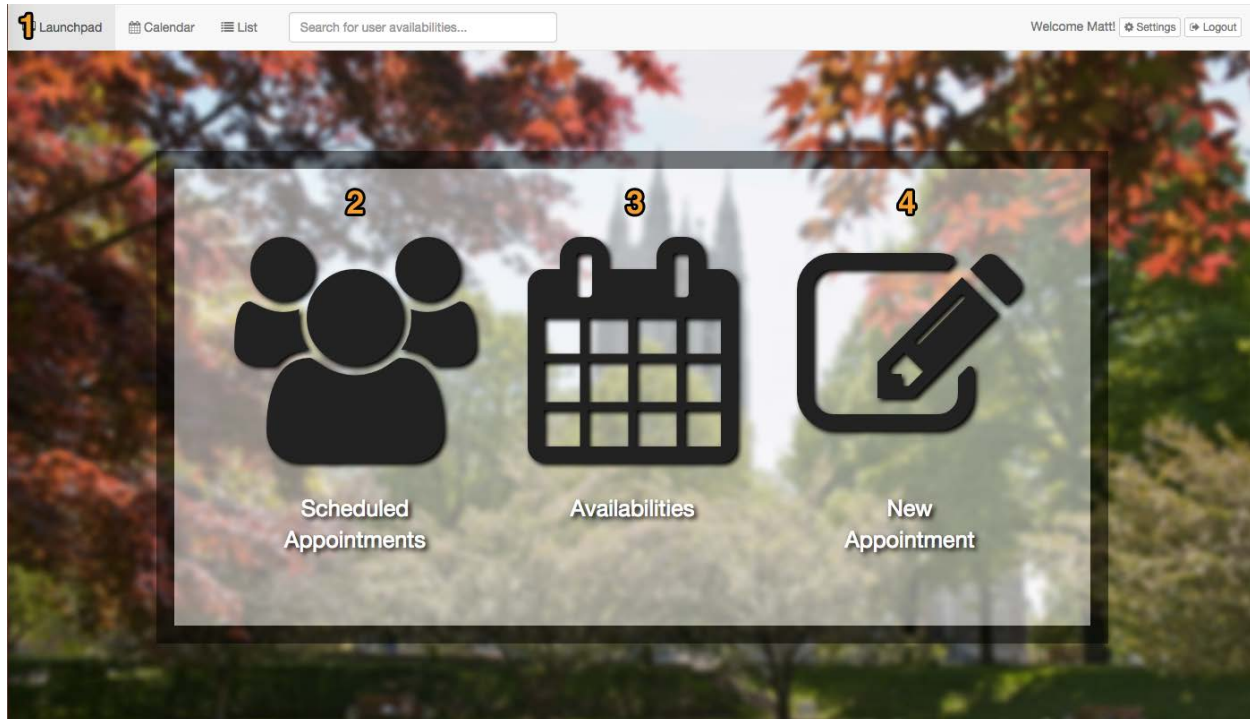


3. The label now becomes "Student Progress." Note how the filter has automatically adjusted to the new label for you.



## 11.0 TIMEFREE APPOINTMENT SCHEDULING

For BC offices, the TimeFree functionality will initially be to create a office calendar, used by the offices' front desk students who will be either be checking in students who have arrived for an appointment with an advisor or for making appointments in the available slots defined in the TimeFree for the program advisors.



### 1. Menu bar has the following:

*Launchpad* - Brings you back to the Launchpad view from any screen

*Calendar* - Jump directly to the calendar view

*List* - Jump directly to the list view

*Search* - Use this search on the calendar or list view to search for another user's availability.

*Settings* - Set up appointment types and sync your calendars

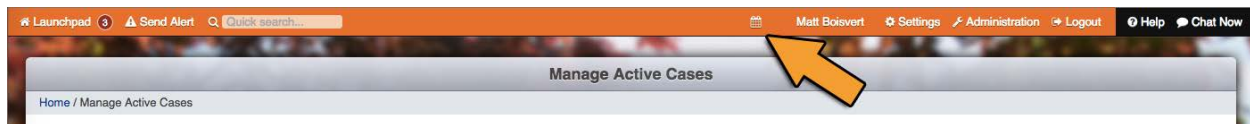
*Logout* - Logout of TimeFree

### 2. **Scheduled Appointments.** Quick link to view your scheduled appointments. This view is a great view to look at your upcoming schedule or check on an appointment's status.

3. **Availabilities.** Quick link to your current availability time slots. This view is helpful to see when you could schedule a new appointment and see what other users see when trying to make an appointment with you.
4. **New Appointment.** Quick link to schedule a new appointment. This view will bring up the New Appointment pop-up and allow you to add users, pick a time, topic and add notes.

### 11.1 How to Access TimeFree from Pharos360

To access TimeFree click on the *calendar icon* in the top-menu bar from any page within 360.



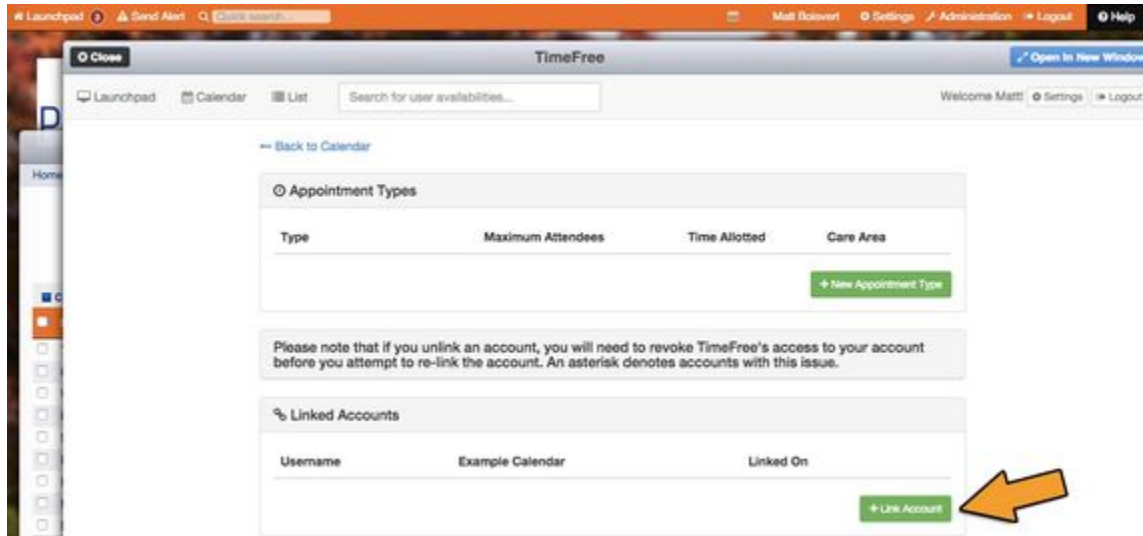
TimeFree will load in a pop-up window. If you would like a large view, click the blue **Open in a New Window** button in the top-right corner. From the Launchpad you can do the following:

1. View **Scheduled Appointments**
2. Check your **Availabilities**
3. Schedule a **New Appointment**

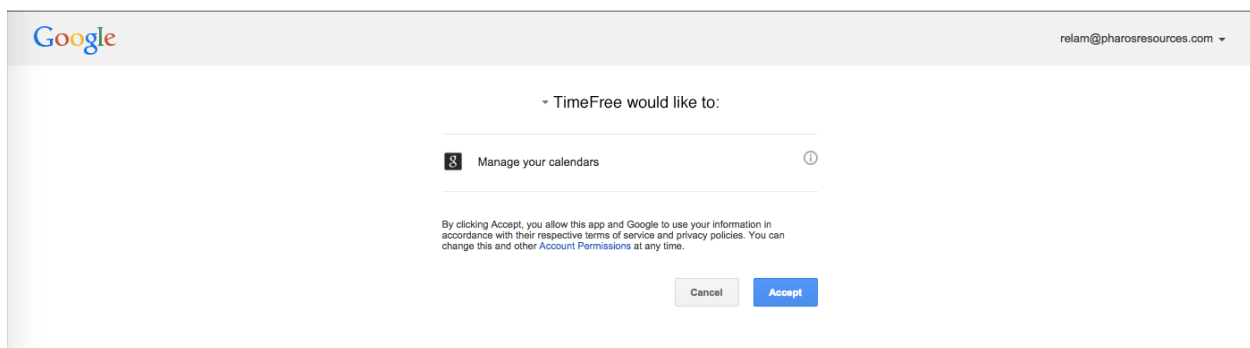
### 11.2 Google Calendar Integration

In order to make the most of TimeFree, you will want to select at least one Google calendar to sync with. When creating availabilities within TimeFree, you'll be given the option to select which calendar you would like to sync scheduled appointments with. This option allows you to view upcoming appointments from wherever you can access Google and keep your Google calendar reminders intact.

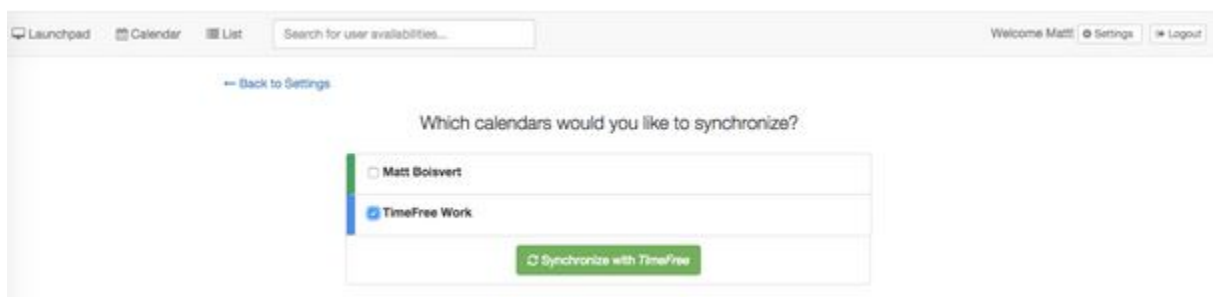
To link your Google calendars, click on the **Settings** button in the top right corner of the screen (opposite *Launchpad*). Scroll down to the heading that says Linked Accounts and click on the green **Link Account** button.



Click on the blue **Accept** button to allow TimeFree access to your Google calendar account

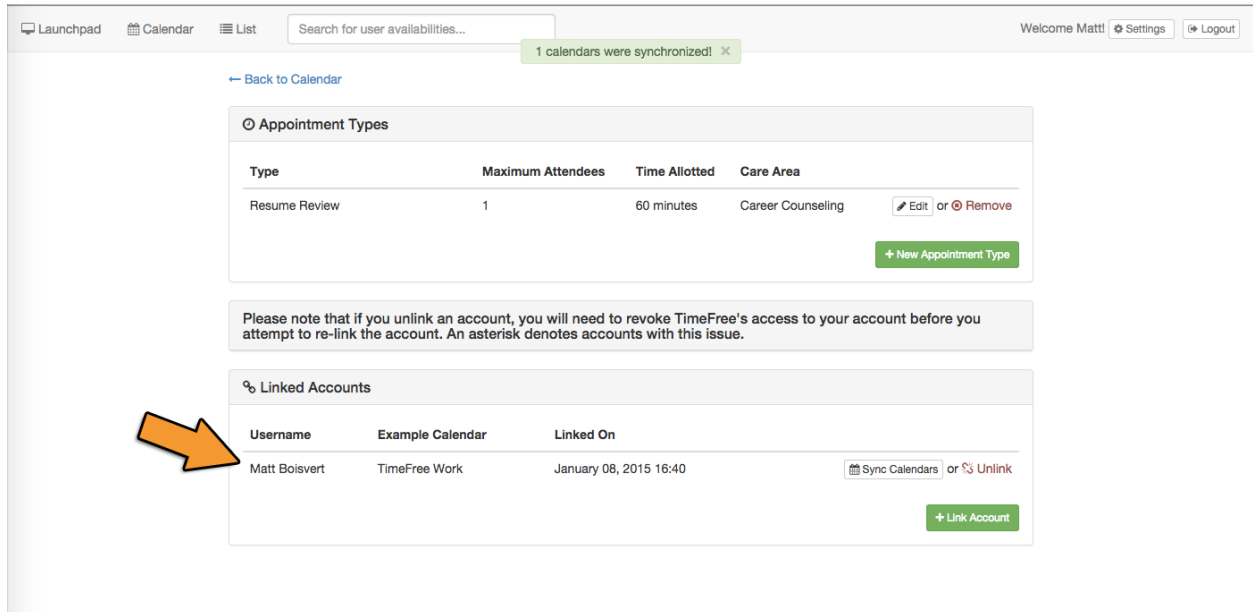


Select all the calendars to which you would like to grant TimeFree access.





Click on the green **Synchronize with TimeFree** button.



The screenshot shows the 'Appointment Types' and 'Linked Accounts' sections of the system. The 'Appointment Types' section includes a table with columns: Type, Maximum Attendees, Time Allotted, and Care Area. The 'Linked Accounts' section includes a table with columns: Username, Example Calendar, and Linked On. An orange arrow points to the 'Sync Calendars' button for the 'Matt Boisvert' account.

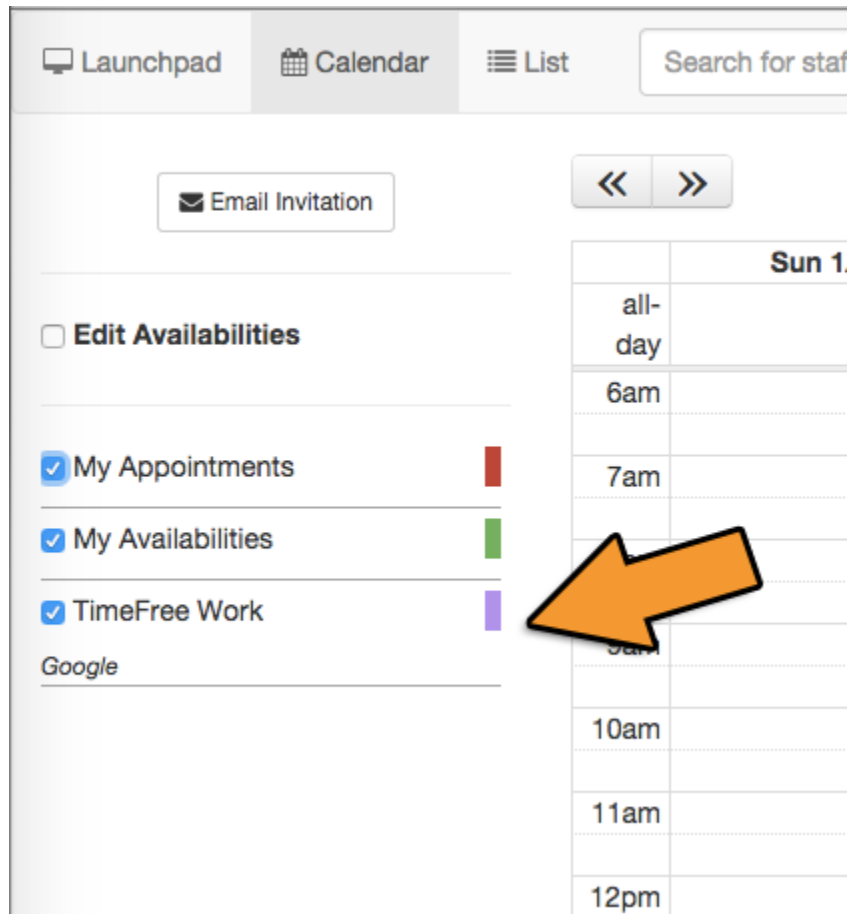
**Appointment Types**

Type	Maximum Attendees	Time Allotted	Care Area
Resume Review	1	60 minutes	Career Counseling

**Linked Accounts**

Username	Example Calendar	Linked On
Matt Boisvert	TimeFree Work	January 08, 2015 16:40

When you click on the **Calendar** or **List** button in the top right, the calendars you have chosen to link will appear in the left hand side bar on those screens.



### 11.3 Viewing Multiple Students' Class Schedules

To view a group of students' class schedules, it is easy to do from the **My Students** view.

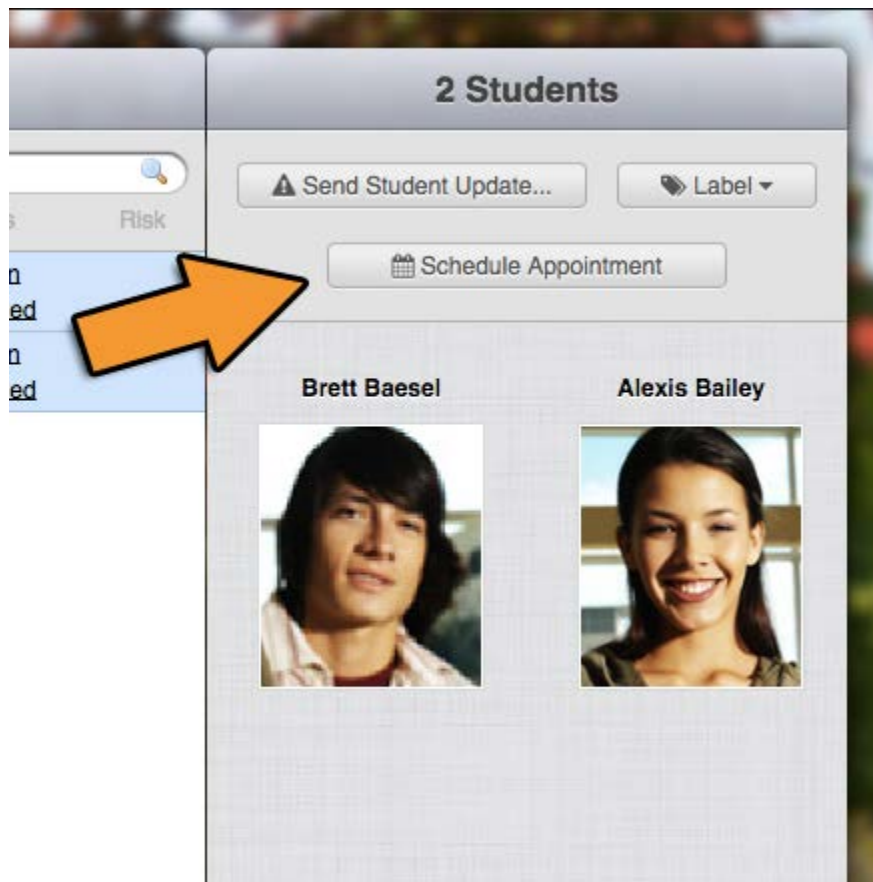
From Pharos 360 **Launchpad**, go to My Students either by hovering over Launchpad and clicking **Students** or by clicking on **Launchpad** and then clicking on the My **Students** icon. Once on **My Students**, click on a group of students on the left-hand side or search for multiple students using the search bar. Click the checkboxes next to the students' names to view their schedules.

The screenshot displays the Student Progress Reporting System interface. The top navigation bar includes links for Launchpad, Send Alert, Quick search, Matt Boisvert, Settings, Administration, Logout, Help, and Chat Now. The main content area is divided into three panels:

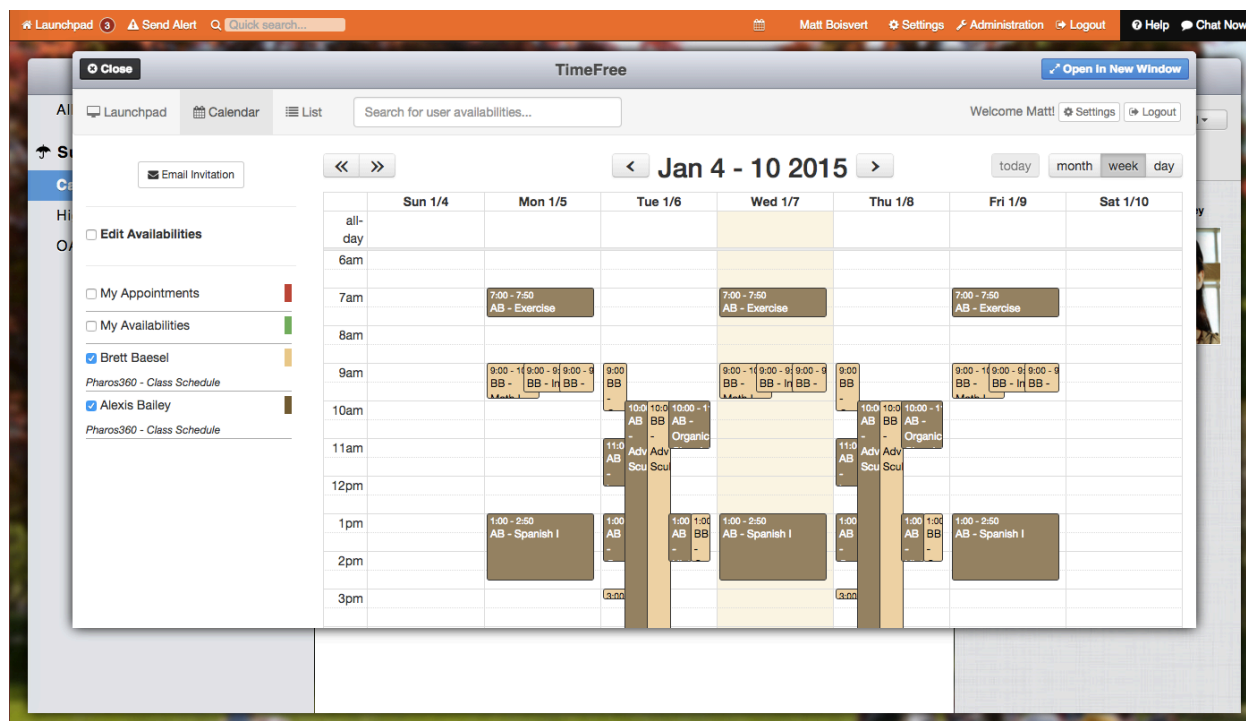
- Groups Panel:** Shows a list of support areas. "Career Counseling" is selected, indicated by a blue highlight and a count of 2.
- Career Counseling Panel:** Displays a table of students. The table has columns for Student Name, Cases, and Risk. Two students are listed: Brett Bear Baesel and Alexis Sarah Bailey, both with 2 open cases and 0 closed cases.
- 2 Students Panel:** Shows individual student profiles for Brett Baesel and Alexis Bailey, each with a photo and a "Schedule Appointment" button.

Student Name	Cases	Risk
Brett Bear Baesel	2 open 0 closed	
Alexis Sarah Bailey	2 open 0 closed	

Then click on **Schedule Appointment** to open TimeFree.



TimeFree will display those students' class schedules.



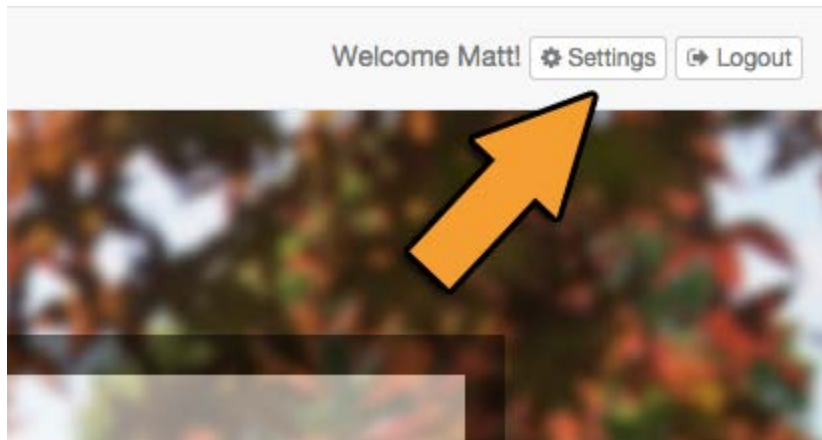
From here, search for open time to schedule an appointment with these students.

**NOTE:** After scheduling appointments, please be sure to refresh the system, by clicking on the circular arrow at the top of your screen so that the new appointment will be displayed and the email notification will appear in your email box.

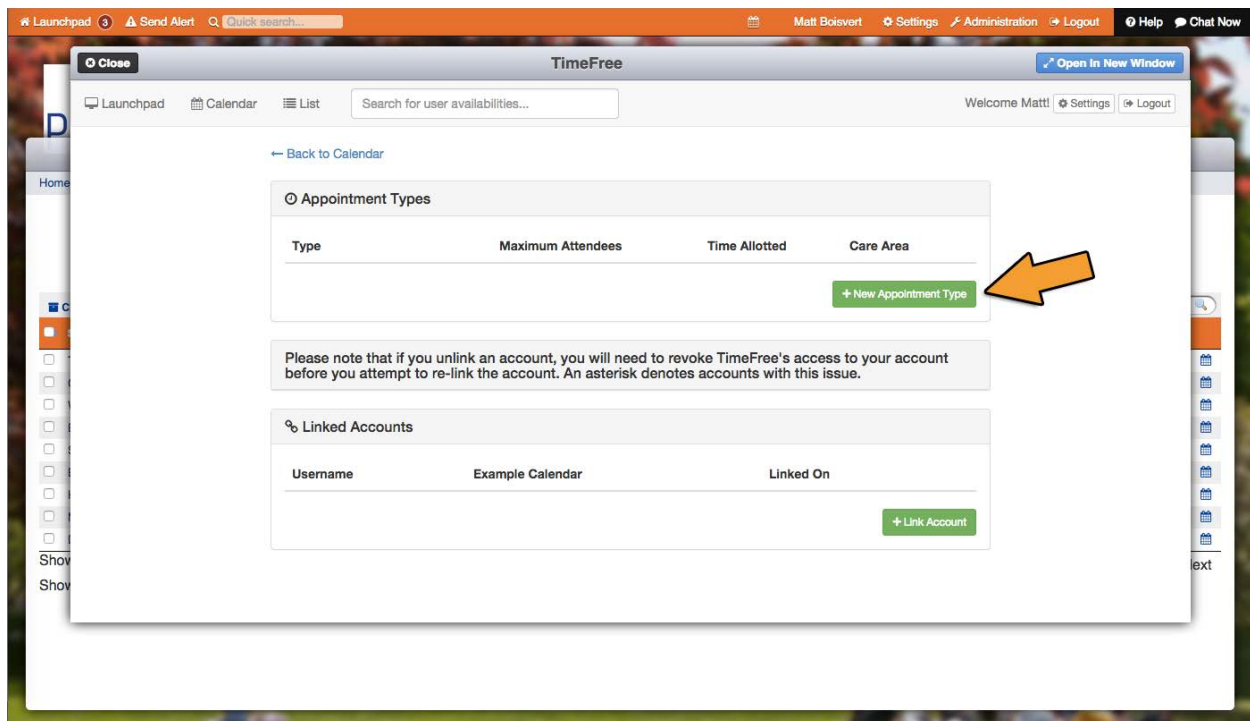
#### 11.4 Creating a New Appointment Type

To schedule an appointment in TimeFree, first select the **Appointment Type**. Appointment types are set per user and you can create an unlimited number. BC Pharos 360 standard nomenclatures is using office acronym, followed by words, each beginning with a capital letter, followed by lower case letters, such as LRSA Group Tutoring, BAIC Advising, LTL Course 101 Tutoring.

To create a new appointment type, log into TimeFree. Click on the **Settings** button in the top-right corner.



Once on the **Settings** screen, click on the green **New Appointment Type** button under the **Appointment Types** heading. The New Appointment Type pop-up will display where you can customize your new type.



The New Appointment Type pop-up will display where you can customize your new type.

The screenshot shows the TimeFree application interface. A modal dialog titled "New Appointment Type" is open in the center. The dialog contains the following fields and options:

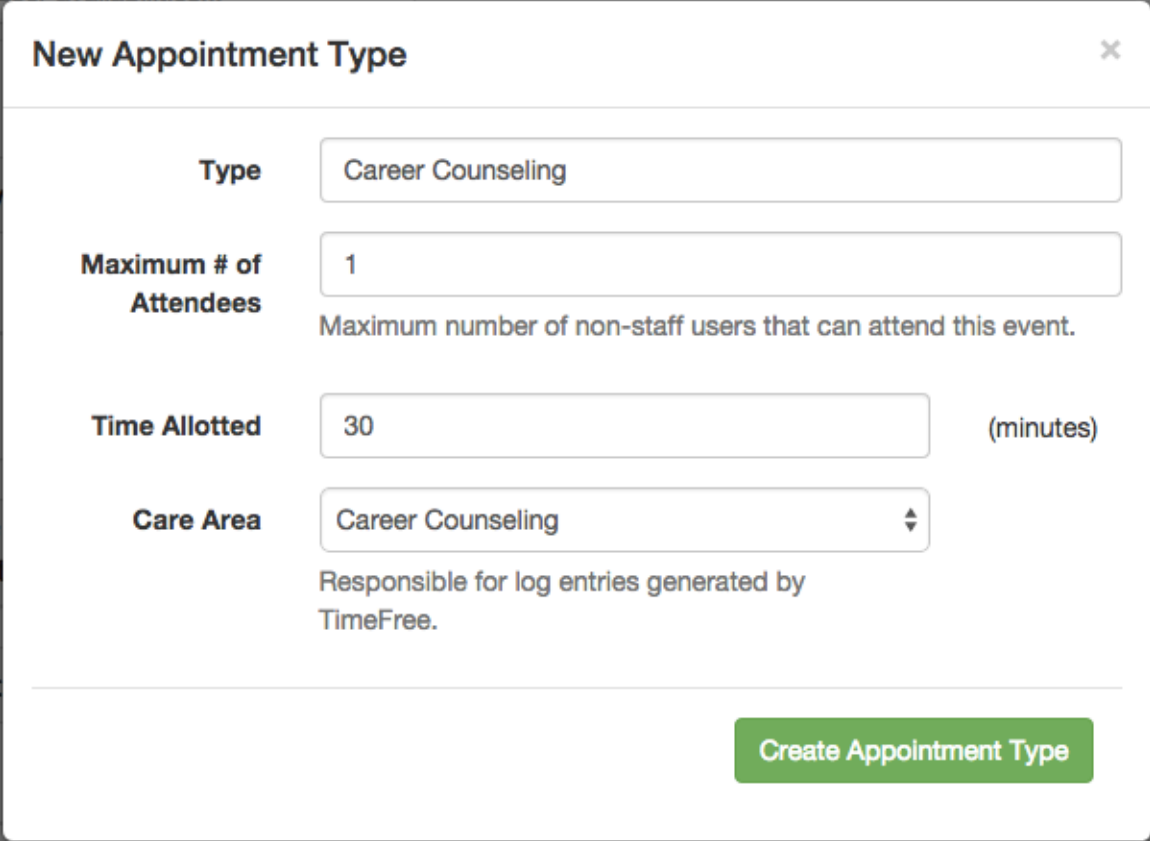
- Type:** A text input field with a cursor.
- Maximum # of Attendees:** A text input field containing the number "1". Below it, a note reads: "Maximum number of non-staff users that can attend this event."
- Time Allotted:** A text input field. To its right, the text "(minutes)" is displayed.
- Care Area:** A dropdown menu with "Career Counseling" selected. Below it, a note reads: "Responsible for log entries generated by TimeFree."
- Create Appointment Type:** A green button at the bottom right of the dialog.

The background shows the TimeFree application with a top navigation bar (Launchpad, Send Alert, Quick search, Matt Boisvert, Settings, Administration, Logout, Help, Chat Now) and a sidebar with various icons. The main content area is partially obscured by the dialog.

You'll be required to provide the type of appointment (example: BAIC Counseling, LRSA English Tutoring, etc.), Maximum # of Attendees, Time Allotted, and the Cohort under which all log entries will be saved for this appointment type.

Click on **Create Appointment Type** to save your new type.

The **Appointment Type** is unique to a counselor. Two counselors can have BAIC Advising, for example, but all appointments for BAIC Advising will be listed in the log entries for students in the counselors' respective cohort (care area) that was entered when the appointment was created.



The image shows a 'New Appointment Type' dialog box with a close button (X) in the top right corner. It contains four input fields: 'Type' (text input with 'Career Counseling'), 'Maximum # of Attendees' (text input with '1'), 'Time Allotted' (text input with '30' and '(minutes)' to its right), and 'Care Area' (dropdown menu with 'Career Counseling'). Below the 'Care Area' field is a descriptive text: 'Responsible for log entries generated by TimeFree.' At the bottom right is a green button labeled 'Create Appointment Type'.

Type	Career Counseling	
Maximum # of Attendees	1	Maximum number of non-staff users that can attend this event.
Time Allotted	30	(minutes)
Care Area	Career Counseling	Responsible for log entries generated by TimeFree.

Create Appointment Type

Once your new type is saved, you will receive a green success message and your new appointment type will be viewable under Appointment Types. This appointment type will now be displayed as an option when you create your availabilities.



The screenshot shows the 'Appointment Types' and 'Linked Accounts' section of the TimeFree interface. At the top, there's a navigation bar with 'Launchpad', 'Calendar', and 'List' tabs. A search bar for 'user availabilities...' is present. A green notification banner states 'Appointment Type was successfully created.' Below this, a 'Back to Calendar' link is visible. The 'Appointment Types' section contains a table with columns: Type, Maximum Attendees, Time Allotted, and Care Area. One entry is shown: 'Career Counseling' with 1 maximum attendee and 30 minutes allotted. To the right of the table are 'Edit' and 'Remove' links. A '+ New Appointment Type' button is at the bottom right. Below the table, a note states: 'Please note that if you unlink an account, you will need to revoke TimeFree's access to your account before you attempt to re-link the account. An asterisk denotes accounts with this issue.' The 'Linked Accounts' section has a table with columns: Username, Example Calendar, and Linked On. A '+ Link Account' button is at the bottom right.

### 11.5 Creating an Availability

Setting up your availability for appointments is an important piece of TimeFree. By building out your availabilities you can:

- Start creating your own appointments
- Allow other staff to schedule appointments for you
- Invite students to make appointments
- Ensure proper logging and reporting of your time spent with students

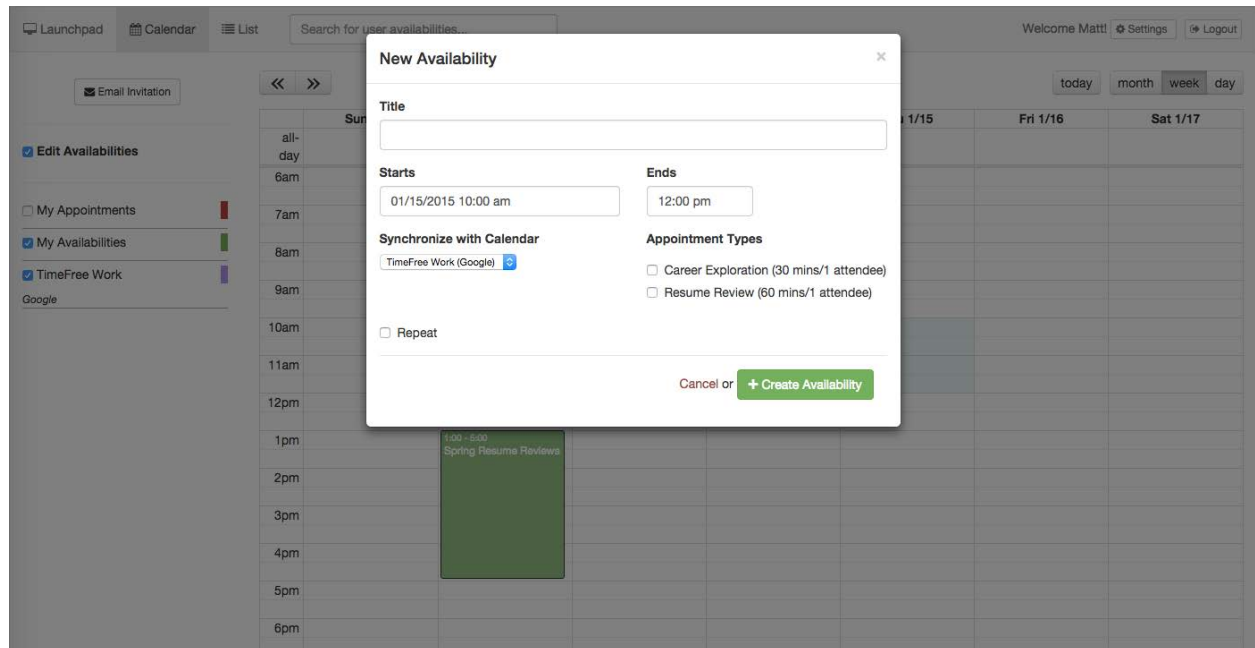
**User Hint:** Make sure you already have at least one Appointment Type and synced your calendars before creating an Availability!

There are several ways to create an Availability time slot.

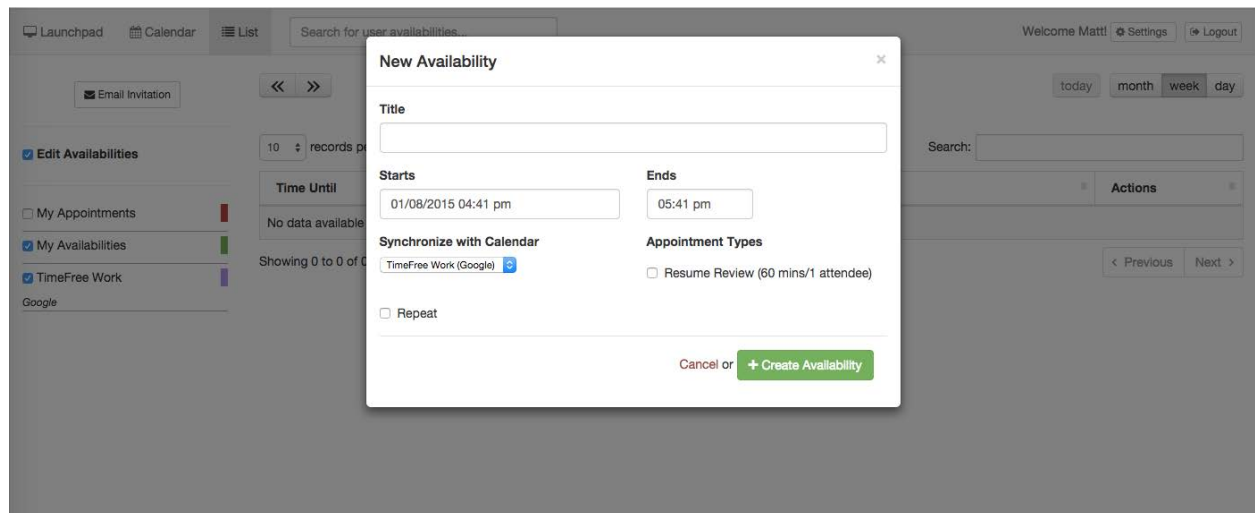
To create a new Availability, either click the **Add New** button on the List View:

The screenshot shows the 'List View' of the TimeFree interface. The navigation bar at the top includes 'Launchpad', 'Calendar', and 'List' tabs. A search bar for 'user availabilities...' is present. A green notification banner states 'Appointment Type was successfully created.' Below this, a 'Back to Calendar' link is visible. The 'Appointment Types' section contains a table with columns: Type, Maximum Attendees, Time Allotted, and Care Area. One entry is shown: 'Career Counseling' with 1 maximum attendee and 30 minutes allotted. To the right of the table are 'Edit' and 'Remove' links. A '+ New Appointment Type' button is at the bottom right. Below the table, a note states: 'Please note that if you unlink an account, you will need to revoke TimeFree's access to your account before you attempt to re-link the account. An asterisk denotes accounts with this issue.' The 'Linked Accounts' section has a table with columns: Username, Example Calendar, and Linked On. A '+ Link Account' button is at the bottom right.

Or select a time slot on the Calendar view



The **New Availability** pop-up will be displayed.



You'll be required to provide this new Availability with a **Title**, **Start** and **Ending** date/time, which calendar to synchronize with, and the type of appointment that can be scheduled during this time slot. Optionally, you can set your **Availabilities** to repeat.

To save your changes, click the green **Create Availability** button.

or user availabilities...

### New Availability

**Title**

Spring Resume Reviews

**Starts**

01/12/2015 01:00 pm

**Ends**

05:00 pm

**Synchronize with Calendar**

TimeFree Work (Google)

**Appointment Types**

☒ Resume Review (60 mins/1 attendee)

☐ Repeat

Cancel or [+ Create Availability](#)

If the checkbox next to **My Availabilities** is checked, you'll be able to see the new Availability you just created.

Launchpad Calendar List Search for user availabilities... Welcome Matt! Settings Logout

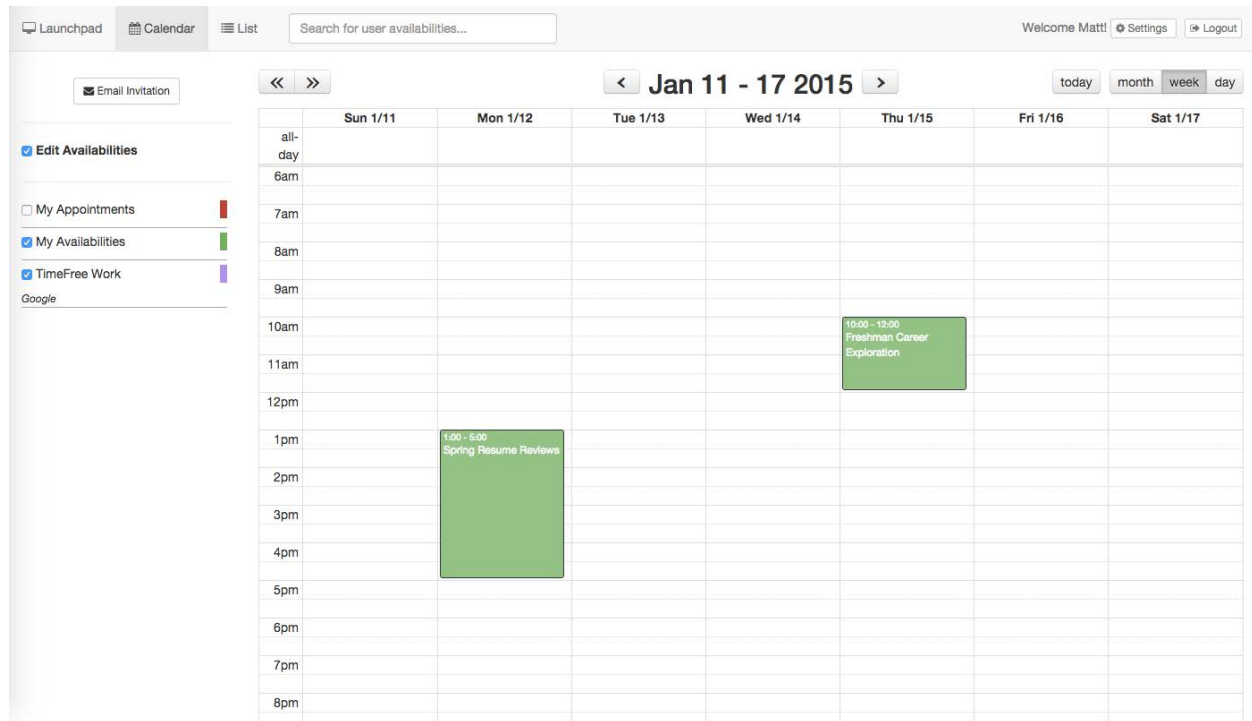
Email Invitation < > < Jan 11 - 17 2015 > today month week day

☒ Edit Availabilities 10 records per page + Add New Search:

Time Until	Date	Time	Event	Actions
in 4 days	Mon, Jan 12th	1:00 pm - 5:00 pm	Spring Resume Reviews	<a href="#">Edit</a> <a href="#">Schedule</a>

Showing 1 to 1 of 1 entries < Previous 1 Next >

☐ My Appointments  
☒ My Availabilities  
☒ TimeFree Work  
Google



Once saved, your new Availability will appear on the calendar view. You can now start scheduling appointments within these designated time slots.

Just below the icons on the left for the **Launchpad**, **Calendar**, and **List**, is a square labeled **Email Invitation**. Clicking on this results in a popup for an email template to send to a student or a colleague, with the subject and a direct link to the sender's availability so that the recipient(s) can make an appointment in one of the available time blocks.

You can also search for a colleague's availability to coordinate an appointment with a student and you. First, you must ask permission from your colleague to share his/her calendar. Then displaying this calendar, along with yours and the students, you can create an appointment.

**APPENDIX A - ODS DATA IN BC PHAROS 360**

<b>PHASE 1, 12/19</b>	<b>PHASE 2, 1/30</b>
<b>ENTITLED BASIC</b> Student_Data.csv	<b>ENTIRE EXTENDED</b> Extended_Student_Data_Student_View.csv
Student ID	Student_ID
Preferred Name	Last Name
First Name	First Name
Middle Name	Middle Name
Last Name	Email Address
Secondary ID	
	<b>SPORTS ONLY EXTENDED</b> Extended_Student_Data_LRSA_Student_View.csv
Date of Birth	
Email Address	Student_ID
Permanent Phone	Last Name
Permanent Address	First Name
Local Phone	Middle Name
Local Address	Email Address
Dorm Phone	Sports Indicator
Dorm Address	

Dorm PO Box	
<b>ENTITLED EXTENDED</b> Extended_Student_Data _Expanded_Academic.csv	<b>ENTITLED EXTENDED</b> Extended_Student_Data_LTL_Student_View.csv
Student_ID	Student ID
College/BC School	Last Name
Major 1	First Name
Major 2	Email Address
Major 3	Date of Birth
Minor 1	Graduation Term
Minor 2	Gender
Minor 3	Ethnicity
Program of Study 1	Enrollment Status
Program of Study 2	
Program of Study 3	<b>ENTITLED EXTENDED</b> Extended_Student_Data_LTL_TA_View.csv

Contact Privacy	Student ID
Address Privacy	Last Name
Demo_Academic Privacy	First Name
Demo_Demographics_Privacy	Academic Level
Demo_Total_Privacy	
BC Advisor Full Name	
BC_Advisor_Phone_Number	
BC_Advisor_Email_Address	
BC_Advisor_Department_Name	
Disabilities y/n	
First Gen code	
AHANA y/n	
AHANA Code	
Sports Indicator	
LTL Student	
OTE Student	
<b>ENTIRE BASIC</b> <b>Employee_Data.csv</b>	
Faculty ID	
Full name	
Email Address	
<b>ENTITLED BASIC</b> <b>Class_List.csv</b>	
Course ID	
Student ID	
<b>ENTIRE BASIC</b> <b>Class_Information.csv</b>	
Course ID	

Title	
Faculty ID	
Number of course hours	
Days of the Week	
Start Time	
End Time	
Building	
Room	
Format	
<b>PHASE 3, 2/13</b>	<b>PHASE 4, 2/27</b>
<b>ENTITLED BASIC</b>	<b>ENTITLED EXTENDED</b>
<b>Class_Information.csv</b>	<b>Extended_Student_Data_Demographics</b>
Course ID	Student ID
Title	Date of Birth
Faculty ID	Gender
Number of course hours	Ethnicity
Days of the Week	College Code
Start Time	US_Citizenship_Code
End Time	Citizenship
Building	Country of Birth
Room	Contry of Residence
Format	Home country permanent
<b>ENTITLED BASIC</b>	
<b>Student_Data.csv</b>	Home country local
Student ID	
Preferred Name	<b>ENTITLED EXTENDED Extended_Student_Data_Academic.csv</b>
First Name	Student ID
Middle Name	Enrollment Date
Last Name	Entrance Term
Secondary ID	Reason for Non-Enrollment
Date of Birth	Expected Graduation Term
Email Address	Graduation Term
Permanent Phone	Enrollment_Status
Permanent Address	Prior Term Credits
Local Phone	Prior Term GPA
Local Address	Total Credits



Dorm Phone	Cum GPA
Dorm Address	Term
Dorm PO Box	Academic Level
	ACT
	SAT
	<b>ENTITLED EXTENDED Extended_Student_Data_Expanded_Academic.csv</b>
	Student_ID
	College/BC School
	Major 1
	Major 2
	Major 3
	Minor 1
	Minor 2
	Minor 3
	Program of Study 1
	Program of Study 2
	Program of Study 3
	Contact Privacy
	Address Privacy
	Demo_Academic Privacy
	Demo_Demographics_Privacy
	Demo_Total_Privacy
	BC Advisor Full Name
	BC_Advisor_Phone_Number
	BC_Advisor_Email_Address
	BC_Advisor_Department_Name
	Disabilities y/n
	First Gen code
	AHANA y/n
	AHANA Code
	Sports Indicator
	LTL Student

## APPENDIX B - QUESTIONS AND ANSWERS DURING FINAL IMPLEMENTATION

Below is a running list of questions that the staff in the various departments asked the vendor as we came closer to the January 12<sup>th</sup> system GO LIVE date.

1. **Closing a Case/Resolutions:** we discussed why LRSA would close a case. Some options we came up with were: transfer from university, quit team, graduated, medical, other.

Each department can decide which resolutions fit with the purpose of either your mission, or whether there are resolutions relating to a particular cohort. Please adhere to our format of appending to the beginning the acronym for your office and a hyphen, separated by a space on both sides of the hyphen. (Example: LRSA - Transfer from University)

2. Currently in UIS, if a student quits the team, under the Athlete Code (sports indicator) in UIS, the system has '00=No Longer Te' ('no longer on team'). There is a similar indication when a student is on a leave of absence. This could happen at any point in the semester. In the cases of 'no longer on team' or 'leave of absence', would these students be included in the nightly upload? How would this impact their status in Pharos360---example would be a student taking a leave of absence half way through the semester; would this student's records and profile still be in the system?

Pharos 360 keeps a record of every student that you have sent to the system. This allows core users to go back and find entries, if needed, after the student has left the university, graduated, or un-enrolled and then re-enrolled.

For each of these students who are no longer included in your data files, Pharos 360 will retain their basic information and their log intact.

3. We will be receiving the Sports Indicator code within the Extended Data tab for entitled "LRSA Student View" so LRSA will be able to view these codes within Pharos 360. How quickly does this information gets updated in the SIS and if they are no longer on a team?
4. Will they stop being sent in the LRSA Student View extended data file once they leave a team?

Correct, no information would appear for that student on that tab. The LRSA staff member would know they are no longer considered an athlete according to SIS.

5. Can you search and report on resolutions? An example would be number of students who transferred.

Yes, resolutions are saved in the students' logs. If you wish to search within a specific student's log simply go to their **Student Information** page and use the filter box, enter *Case Closed* or *Close Case* and this will populate all close case information. You could also choose to export that student's log (by clicking on the **Export** link above their log on the **Student Information** page).

If you would like to see resolution information for a cohort, you can access this information with

either **Dashboards** or **Export Data**. **Dashboards** (found under **Administration/Management --> Dashboards**) will give you a quick visual view of number and percentage of cases closed with specific resolutions. You'll select "Cases" from the first drop-down then select a particular cohort or choose to show all. Finally, select a date range and click "Go". Close case information is found at the bottom of this view.

If you would like an export, you can go to **Administration/Management --> Export Data**. I would suggest using the Log Entries Export for a particular cohort. Once exported, sort or filter by "close case."

6. When closing a case, is that information archived and if so, how is it accessed? what if someone came back to the university or back on the team? could the case be re-opened?

When closing a case it is like moving the paper file off of your desk to a filing cabinet. The case will no longer appear on your **Manage Active Cases** view, but the case information and log entries will remain in the student's log. If a student comes back to the university, you can manage the student again and open a new case at any point.