NYU Connect

Advisor and Student Services Professionals Training Guide

NYU Connect is a student success platform that enables faculty, advisors, and student services professionals to identify students in need, collaborate with colleagues, and ensure students get connected to campus resources.

Should you need any assistance with NYU Connect:
- Email: nyuconnect@nyu.edu
- Call: 212-998-4270
- Click: https://www.nyu.edu/life/student-success/nyu-connect.html

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Fall 2018 Launch: Overview and Scope

- All undergraduate students with a home campus of Washington Square (ie, with the exclusion of NYU Abu Dhabi and Shanghai) are able to be seen in NYU Connect and users can raise flags, give kudos, and/or add a note to the student's record in NYU Connect.
- Faculty teaching undergraduate courses offered by NYC-based schools can raise a flag and/or give a kudo to any student in their class.
- Students will not use NYU Connect at this time.

NYU Connect Features Overview

Roles, Relationships, and Connections

- NYU Connect is role- and relationship-based.
- A role is a named set of privileges that defines the actions that a user with that role can take and the information that role can see in NYU Connect.
  - Each user in the system has at least one role and may have more than one role.
  - If you feel you are missing a role, please contact nyuconnect@nyu.edu
- Relationships are your connection(s) to your student(s).
  - For advisors, these connections are determined by Albert advising assignments.
  - For administrators, connections are determined by your job function and are assigned to you once an access request has been submitted by your school/department.
- A relationship connection can be:
  - Course-based, such a faculty to the students in their class
  - One to one, such as an advisor to their advisee
  - One to many, such as an Academic Dean to all the students in their school
  - All students, such as a general advisor to all students in the system
- When viewing your student list you will see a filter for “Connection.” Connection is the role(s) you have in NYU Connect and your relationship with a student is based on that role.
- For example:
  - As an Academic Advisor, you are connected to all your advisees that are assigned to you in Albert, and have the maximum access to their information and to their tracking items (flags and kudos) and notes.
  - As a School Student Affairs user, you are connected to all students in your school the system with specific permissions to their tracking items and full access to their notes.
  - As a faculty member, you have access to see the same information about the students in your class(es) this term as you do in Albert.
Tracking Items: Flags and Kudos

- NYU Connect utilizes tracking items to inform advisors and other providers of students’ performance in the classroom and beyond.
- Flags are potential causes for outreach to the student for assistance. These flags can serve as “early alerts” that a student may be in need of help.
- Kudos are recognition of a student’s good performance in a classroom or beyond.
- Both types of tracking items are viewable and actionable by advising roles.
- Faculty can only view/comment/cancel tracking items that they created.

Flags: Manual and System

- NYU Connect has two types of flags: manual- and system-generated.
  - Manually created flags are “raised” by faculty and other users in the system based on an interaction or observation regarding a student.
  - System generated flags are generated automatically by NYU Connect when a student meets a predetermined set of criteria that may warrant outreach.
- Based on your permissions and settings of the flag, you may receive an email when a flag is created, assigned to you, and/or cleared for one of your students.
  - There are three types of email notifications for flags:
    - Manual Flag notification
    - System Flag notification
    - Critical Flag notification
  - The email will let you know the general category of flag created as well as the student the flag is for.
  - The email will not include any details or comments; you will need to log into NYU Connect for that information for FERPA/security reasons.
  - If the flag is set as critical, you will receive an email immediately, regardless of your notification settings.
- You can use the filters in your Tracking tab to create and download lists of students with multiple flags, a specific combination of flags, and more for custom outreach.

Kudos

- Currently, NYU Connect has three kudos:
  - Academically Exceptional Student
  - Global Awards Academic
  - Global Awards Leadership
- Faculty and other providers can give a student a kudo.
  - Give a kudo to a student as a form of praise or encouragement. Everyone likes good news! Kudos will be shared with Advisors only at this time.
Notes

- There are three types of Notes in NYU Connect:
  - Albert Advising Note: Advising notes imported from Albert. View only. Only visible to users with advising-related roles.
  - Dean's Note: Notes that can be created by advisors but only viewable to Advising Deans (or designee).
  - Shared Note: Notes that can be created by any user (except faculty) in NYU Connect and visible to all non-faculty users.

- Notes, and all other information in NYU Connect as with any University-maintained system, are a part of the student record and as such, students have the right to request this information as per their FERPA rights.
  - Review the NYU FERPA statement and contact nyuconnect.support@nyu.edu with any questions or concerns regarding FERPA and NYU Connect.
Navigating and Using the System

Customize your Profile, add a photo, and set your Login Page

Overview
- You can add information to your NYU Connect profile such as your title and alternate email. Your primary email and your phone number have been imported for you from WorkDay.
- You may also upload a picture of yourself, if you would like, to the system.
- It is recommended that you set your login (landing) page preference so you will automatically be taken to the page where you will be taking the most action based on your job role:
  - If you will typically create flags, kudos or notes → Students > My Students
  - If you will typically view/manage flags, kudos or notes → Students > Tracking
- You can change these settings at any time.

Procedure
1. Log into NYU Connect using your NetID and password.
2. You can also find the link:
   a. Via NYU Home card
   b. In the “Other Resources” tab of Albert
   c. For faculty: on the class/grade rosters
3. You will be taken to the NYU Connect’s default login page.
4. Set your login page preference for quick access to the features you use most:
   a. Click the main menu button ("Hamburger menu" - 3 horizontal bars) at top left of the page.
   b. Click arrowhead next to your name to expand options and select "Institutional Profile".
   c. Set your desired Login Page
      i. If you will typically create flags, kudos or notes → Students > My Students
      ii. If you will typically view/manage flags, kudos or notes → Students > Tracking
      iii. You can also add your title, phone, alternate email (if needed), etc.
5. Click "Submit."
Set your Notification Preferences

Overview

- Based on your role(s), NYU Connect may send a system-generated email when a tracking item (flag or kudo) is raised, assigned to you, and/or cleared for a student you are connected to in the system.
- There are four types of tracking item email notifications:
  - Manually-raised Flag
  - System-generated Flag
  - Critical Flag
  - Kudo
- You can set your notification preferences so that you receive a daily or weekly digest of these emails. You can change these settings at any time.
- Some flags have been deemed critical flags. As such, any notifications for these type of flags will override your notification settings and you will receive the email immediately.

Procedure

1. Click the main menu button ("Hamburger menu" - 3 horizontal bars) at top left of the page.
2. Click arrowhead next to your name to expand options and select "Email Notifications".
3. Set your desired preferences - daily or weekly, time/day, and/or specific email settings for tracking items (flags and kudos). Click "Submit."
View your Students

Overview

- You will be able to view, search, and filter your students and their information based on your “connection” to them in NYU Connect. Your connection is your role that allows you to view a set of student data.
  - You can also search for a specific student at any time using the upper-right “Search for students” search box (use N#, Empl ID, name, or NetID).
  - Advisors/Faculty Mentors with advisees assigned to them in Albert: you can use this list like your Advisee list in Albert by setting the following filters:
    - Search = [blank]
    - Connection = Academic Advisor OR Faculty Advisor/Mentor
    - Term = Ongoing
    - Cohort = [blank]
  - Student Services Professionals will see students based on their job role at the University.

- Filters include:
  - Search
    - You can search by a student’s first/last name (preferred names are displayed in NYU Connect if the student has set one), NetID, N#, or EmplID.
  - Connection
    - Your role in relation to the students that will be returned by the search.
  - Term
    - All - all term(s) in which you have a relationship with at least one student
    - Active - current term; typically used by faculty only for the best results.
    - Ongoing - no end date specified for the connection, used with advising-related connections. Typically advising, student affairs, and residence life users should use this term in any filter/search they are doing for the best results.
    - Specific term - for faculty teaching course(s) only to find their course(s) in a specific term.
  - Cohort
    - Home school of the student, based on their Primary Plan (major)

- Additional Filters
  - Tracking Items
    - Flags and Kudos by status (active/resolved), item(s) created by a particular user or role, items closed with a certain closure reason
Cohorts & Relationships
- Cohort = home school
- Organizations - currently two exist: Athletics and Residence Hall
  - Use this filter to find all athletes (by sport), or all students in residence (or by hall)

Success Plans - not used at this time

Attributes
- Admit type, Applied to Graduate, Athlete, Current Student, First Generation student, Graduated student, holds/restrictions (Service indicators), Home School, International Student, on a Leave of Absence, in an Opportunity Program, Primary Major, Study Away Location for the term, Veteran…

Procedure
1. You can search for a student at any time by entering their N#, name, NetID, or EmplID in the upper-right search bar.
   a. If a student has a preferred name, that will be their name in NYU Connect.

2. To view your list of students, navigate to your My Students page:
   a. Click the main menu button ("Hamburger menu" - 3 horizontal bars) at top left of the page.
   b. Click the arrowhead next to “Students” and then click “My Students”.

3. By default you will see a list of all students you have a connection to in NYU Connect.
   a. If you have the General Advisor role, you will see all students in the system. Use the filters to narrow down your list.
4. As an Academic Advisor, to see your advisees only:
   a. Select the Connection as “Academic Advisor”
b. Select the term as “Ongoing”

c. As advising relationships have no end date and are not term-based, all advising relationships are “Ongoing”.

5. You can also use a combination of the search bars to create a custom list.
   a. Click “Add Filters” for a more detailed search (if your role permissions allow). You can add multiple filters to create your custom student list as detailed above in the Overview.

   i. Use several different filters at once; for example - find all students from the Fall 2017 cohort who have a hold preventing registration (attributes) and who also have received a low grade flag this past term (tracking item)
...or find all Computer Science majors in CAS who are athletes (attributes) and who are registered less than full time (tracking item).

Notes and Tips
- Filters are “sticky” so until you clear them all by clicking the X on the upper right hand corner of the search bar, the filters you set will remain from session to session.
● Use a wildcard search for the value when you are unsure of the exact wording of an attribute by adding an asterisk - * - before and after the part of the word you know. For example – if you want to find all students who are theater majors but are not sure if it is spelled “theater” or “theatre”, search for *theat*

● You can download the filtered list of students by clicking the “download” button on the top of the search bar.
Student Folder

Overview
- The student folder is the area in NYU Connect where you can access all of a particular student’s information captured in NYU Connect.
- Student data updates nightly from Albert.
- Three years of data is loaded into NYU Connect, so you may see graduated students in the system if that student has at least one advisor (still) assigned to them in Albert.
- Flags, kudos, and notes can be viewed, added, and edited via the student folder if permissions allow.

Procedure
1. Locate the student whose information you want to view via any search/filtering method.
2. Click on their hyperlinked name.
   a. A popup window will appear with the Student Folder.
3. Depending on your role(s) and permissions, you will see various student information in this folder. For advisors and those with advising-related roles, you will see the student’s:
   a. **Overview:** any attributes associated with that student (from Albert data).
   b. **Info:** admissions (first term at NYU and test scores), cohorts (home school), demographics (gender/legal sex and race/ethnicity), and term-by-term academic history information (from Albert data).
   c. **Courses:** classes and grades (midterm and/or final, if available from Albert) a student was/is enrolled in, depending on the term filter you set
   d. **Tracking:** flags and/or kudos associated with that student
   e. **Notes:** any Albert Advising Notes that were created for the student in Albert and any new Shared notes created in NYU Connect. Academic Deans will also be able to view Dean’s Notes.
   f. **Network:** any user connected to the student in the system set to be displayed.
View Flags and Kudos for all your students

Overview
- You can view all flags for all students you have a connection with via the “Tracking” tab.
  - By default, you will see all active flags.
- Use the search filters to see different flag data.
- You can see an individual student’s tracking items in the “Tracking” section of their Student Folder.

Procedure
1. Click the main menu button (“Hamburger menu” - 3 horizontal bars) at top left of the page.
2. Click on the arrowhead next to “Students” and select “Tracking”.
3. You will see all students based on the connection/filter(s) set with tracking items.
4. Use the search bar filters and/or the additional filters to create a custom view of your students and their flags.
   a. For example, maybe you want to see all first generation students with at least one academic concern flag or all athletes with at least one flag for low GPA (term or cumulative).

![Tracking Items](image)

Notes and Tips
- When in a student's Tracking page viewing the Flag Journal, you are able to take action (edit, comment, resolve) on a flag by clicking the flag icon and taking action via the buttons on the popup window.
- You can create a flag from the Tracking page, but will only be able to do so for a student that already has a tracking item.
View/Monitor a Flag/Kudo for an individual student

Overview
- You may want to view a flag you created to see if there has been an update, or you may want to see all flag(s) raised (past or present) for a student.
- You can view all flags for a particular student via their student folder>Tracking Items.

Procedure
1. Click the main menu button ("Hamburger menu" - 3 horizontal bars) at top left of the page.
2. Click on the arrowhead next to “Students” and select “Tracking”.
3. You will see all students based on the connection/filter(s) you have set with tracking items.
   a. By default, your “Inbox” of flags will display - this is a list of all active flags, sorted by creation date - newest to oldest. You can click on any column header to reverse the sort.
4. To see details of the flag, click on the flag icon. A popup will appear. Click on the “details” button.

5. You will be taken to the Tracking page of the Student Folder and the Flag Journal will be expanded for that particular flag.
   a. This Journal will display any comments left by the flag raiser and/or any other providers that have worked on the flag.
Notes and Tips

- When in a student’s Tracking page viewing the Flag Journal, you are able to take action (edit, comment, resolve) on a flag by clicking the flag icon and taking action via the buttons on the popup window.
- You can create a flag from the Tracking page, but will only be able to do so for a student that already has a tracking item.
- You will be able to see any comments associated with the flags in the “Notes” section of the Student Folder.
- If you have the permissions in the system, you will also get an email when a flag for your student is resolved. When you get that email, follow the steps above to see the details of a resolved flag.

Creating a Flag/Kudo

Procedure

1. Locate a student to create a flag for in your list of students.
2. Check the box located to the left of the desired student’s name.
3. Click the “Flag” or “Kudos” button located at the top of the page.

   a. Note: you can also raise multiple flags of the same type for several students at one time by selecting the checkboxes next to the multiple students’ names.
4. A popup window will appear where you will raise the flag.

5. Select the desired flag or kudo that best matches your concern.

   a. Course context: select if the flag is related to a specific course (select flags only).
b. Assignee (for certain flags, based on your permissions to that flag - not for kudos): Leave the flag as “unassigned” if you do not know who should receive it - it will be automatically routed to the student’s advisor(s).
   i. Assign to yourself if you know you are the person who needs to work with the student on the issue.
   ii. If you know the campus partner who should get the flag, and they have a relationship with the student in NYU Connect and the access to the specific type of flag, you can directly assign the flag to them.
   iii. The number next to the provider name is the number of active tracking items they currently have assigned to them.
   
![Image of flag assignment interface]

c. Comment: enter in more information about why you are raising the flag. Note that for some flags, comments are required. Students will not be able to see the flags and/or comments unless they request to do so under FERPA.

![Image of comment field]

6. Click “Save” when done. You will receive a popup confirmation.
Notes and Tips

- Alternate ways of creating a flag/kudo
  - From Student Info popup window: When on the list view, hover over a student's name. A popup with student information will appear. Click the “Flag” button at the bottom of the popup.

  ![Image of Student Info popup window](image)

  ○ From Student Folder: Click on a student's hyperlinked name. The student’s “Folder” will appear. Click the “Flag” button in the upper left of the folder.

  ![Image of Student Folder](image)

- You can also create a Flag or a Kudo from the Tracking page following any of the processes above, but only for a student who already has/had a tracking item assigned to them.
Comment on a Flag/Kudo

Overview
- You may want to add comments or an update to an open tracking item as information comes to you. Based on your roles/permissions, you will be able to comment on a flag.
- Tracking item comments are attached to the flag, whereas Shared Notes are independent of a flag.

Procedure
1. Navigate to the Tracking tab.

2. On your tracking page, check the box next to the student and the flag/kudo you want to comment on.

3. Click the “Comment” button.
a. You can also hover over the flag icon on any screen and click “Comment” from the popup that will appear.

4. A popup for adding the comment will appear. Enter a subject for the comment and the comment. You can elect to have the comment emailed to you.

a. While there is a checkbox to send the comment to the student, note that students are not onboarded to the system and as such it is recommended you do not use this feature at this time.

5. Click “Submit” when done.
6. You will get a popup confirmation that the tracking item comment was saved.

Notes and Tips
- You can see the new information you added by hovering over/clicking on the flag icon and clicking “Details”. The entire history of the tracking item will display, including your comments as well as comments left by any other provider(s).
Edit a Flag/Kudo

Overview
- You may have a tracking item that you want to edit by changing the assignee (flags only) and/or editing the comment left by the tracking item raiser (if permissions allow).

Procedure
1. On your tracking page, click the flag icon next to the student/flag you want to edit. The flag popup will appear.
2. Click the “Edit” button.
3. You can (re)assign the flag if appropriate to someone or simply edit and/or add more comments/details here. Click “Save” when complete.
4. You can see the new information you added by hovering over/clicking on the tracking item icon and clicking “Details”. The entire history of the tracking item will display.
Clearing/Resolving/Canceling a Tracking Item

Overview

● Based on your permissions, you will be able to resolve/clear/cancel a tracking item.
● There are five reasons for clearing/a Flag:
  ○ “Discussed concern with student, and established a plan together.”
  ○ “Reached out to address this concern with the student.”
  ○ “The flag is no longer relevant.”
  ○ “The flag was raised by mistake.”
  ○ “Connected with the Wellness Exchange regarding student.”
  ○ The system notes a positive resolution by the green highlight, a negative resolution (one where the student was not directly interacted with regarding the flag) with a red highlight and the other reasons are considered neutral.
  ○ Faculty can only resolve (cancel) flags they have raised. Other providers can resolve (clear or cancel) flags that others have raised based on their relationship to the student and their permissions to that flag type.
● System flags will clear automatically, users do not have to manually clear.
● Kudos do not have reasons to select for clearing; comments can be added however.

Procedure

1. Navigate to your Tracking page and find the student and their tracking item you want to resolve/clear/cancel.

2. Check the check box next to their name, and then click the "Resolve" (thumbs up) button on the top bar.
a. You can also hover over the student's flag icon and click the "Clear" button (thumbs up icon) on the bottom of the pop up window.

3. Flags only: Select the reason you are clearing/resolving the flag.
4. Add a comment as appropriate.
5. Flags only: Close the loop by sending the flag raiser a message regarding why you are clearing/resolving the flag.
   a. It is highly recommended you do this so the flag raiser knows their concern has been received and addressed. This note will be sent to the flag raiser via email, and they and other providers will be able to see this in the Flag Journal.
6. Click “Submit.”
7. You will get a popup confirmation that the tracking item was cleared and that the message was sent to the flag raiser to close the loop as applicable.
8. You can see the flag resolution information you added by hovering over/clicking on the flag icon or by clicking “Details.”

a. The entire history of the tracking item will display.
Viewing Notes

Overview
- Depending on your role(s), you can view notes for all students you have a connection with via the Student Folder in the Notes section.

Procedure
1. Click on the hyperlinked student name to open the student folder for the student you want to view notes for. The Student Folder will appear.
2. Click on the “Notes” left-sidebar menu.
3. All notes you have access to view will appear. You can use the filters to narrow the notes you see.
4. Click the + button to expand a note to view full content.

Notes and Tips
- All comments added to flags and/or kudos users left while assigning or closing the loop are also visible in the Notes section.

Creating Notes

Overview
- Depending on your role(s), you can create Dean’s and/or Shared notes for all students you have a connection with via the Student Folder in the Notes section.

Procedure
1. Click on the hyperlinked student name to open the student folder for the student you want to view notes for. The Student Folder will appear.
2. Click the “Note” button on the top of the folder.
a. You can create the same note for multiple students at once from the student list by checking the box next to the students’ names you want to add a note for and click the “Note” button on the top bar.

3. Select a Note type from the drop down of notes you are able to create.
4. The date of the Note will default to today’s date. You can change if needed.
5. Enter a subject for the note. Typically, this would be akin to the “appointment reason” from Albert Advising Appointment notes if your school uses that system.

![Create Note](image)

6. Enter in the body of the note.
   a. You can elect to send a copy to yourself via email, and/or to the student.

![Create Note](image)

7. If this note is to be shared, leave the radio button for “shared” enabled. If you want this note to be for you only, you can make it “private”.

![Note Sharing](image)

8. Click “Submit” when done.
9. The Note is now viewable to those with permission to the note type in the Notes section of the student folder.

**Notes and Tips**
- Albert Advising Notes are viewable only as they are imported from Albert.
- Even if a note is marked “private,” it is still viewable by system administrators and in accordance with FERPA would be included in the student’s record if they requested it under their FERPA rights.