For 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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Overview

- All undergraduate students with a home campus of New York City are now available in NYU Connect. 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 Kudos to any student in their class.

Roles, Relationships, Connections

- NYU Connect is role- and relationship-based.
  - A role is a named set of privileges that defines the actions that a user can take and the information they 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 (assigned to you in Albert) and have the maximum access to their information and tracking items (Flags, Kudos, Referrals, ToDos) and Notes.
  - As a School Student Affairs user, you are connected to all students in your school, 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, Kudos, Referrals, To-Dos

- 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.

All 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.

Getting Started

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

1. Open NYU Connect main menu, click your name, then select “Institutional Profile.”
2. Your ID card photo has been imported. If you’d like to change it, make sure the photo you are uploading is 200x200 pixels.
   a. If you do not want a photo displayed, email nyuconnect@nyu.edu and the Support Team will replace your photo with the NYU Torch.
3. Set your desired Login Page.
   a. “Students -> My Students,” if you typically create Flags, Kudos, or Notes.
   b. “Students -> Tracking,” if you typically view/manage Flags, Kudos, or Notes
4. Add your title. This is what students will see if you are in their Success Network.
   a. If you leave it blank, the students will see a list of the roles you have in NYU Connect, which can be confusing.
5. You can opt to add an alternate email and/or your cell phone number. This is completely optional.
6. In Biography and General Information, we encourage you to enter some details about yourself. Students will see this information if they are connected to you in the system. You may want to enter what you can assist students with, a bit about your education/research, interests/background, etc.
7. Click “Submit”.

Set your Notification Preferences

1. Open the NYU Connect main menu, click your name, and select “Email Notifications.”

2. Set your notification preferences to receive either a daily or weekly digest of NYU Connect emails. You can change these settings at any time.
   a. Based on your role(s), NYU Connect may send a system-generated email when a tracking item (Flag or Kudos) is raised, assigned to you, and/or cleared for a student you are connected to.
   b. Some Flags are deemed critical Flags. As such, notifications for these type of Flags overrides your individual notification settings and you will receive an email immediately.
   c. It is recommended that you get notifications when a tracking item is assigned to you.
3. Click "Submit."
View Your Students

1. You can search for a student at any time by entering their N#, preferred name, NetID, or EmplID in the upper-right search bar.

2. To view your list of students, navigate to your “My Students” page:
   a. Open the NYU Connect main menu, click the arrowhead next to “Students,” then select “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.”
   i. 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 “Edit Filters” for a more detailed search (if your role permissions allow).
   b. Learn more about filtering here: NYU Connect Detailed Filtering Guide

Student Folder

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:
   a. **Overview**: Any attributes associated with the 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 and class assignments, if available, from NYU Classes) a student was/is enrolled in, depending on the term filter you set.
   d. **Tracking**: Flags, Kudos, Referrals, and/or To-Dos associated with that student
e. **Meetings:** Upcoming appointments and the details
f. **Notes:** Notes about the student from their advisors or others they have worked with around campus. Consult with your Advising Office for recommended Notes practices.
g. **Network:** Users connected to the student in the system

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**View All Tracking Items**

**Flags, Kudos, Referrals, and To Dos**

1. Open the NYU Connect main menu, select the arrowhead next to “Students,” and click “Tracking”.
2. You will see students based on the connection/filter(s) set with tracking items.

**View/Monitor a Tracking Item for a Student**

*In NYU Connect tracking items are Flags, Kudos, Referrals and To Dos.*

1. Using the upper-right search bar, search for the student.

2. Click on their name to open their Student Folder.
3. Click on the “Tracking” menu item on the left navigation bar.
4. To see details of a Flag, hover over the Flag icon. A popup appears. Click on the “Details” button.
5. You will be taken to the Flag Journal which displays the entire history of the flag, including any comments left by the flag raiser and/or any other providers that have worked on the flag.

![Flag Journal screenshot]

**Raising a Tracking Item**

**Flag, Kudos, Referrals, To Dos**

1. Using the upper-right search bar to search for a student and click their name to open their Student Folder.
2. Select the Tracking Item button of your choice in the Student Folder.
3. A pop-up window appears where you will raise the Tracking Item. In the following example, we will be raising a Flag.
4. Select the specific item from the drop-down menu.
   a. **Select a Flag:** Select the flag that best meets the students situation.
   b. **Course context:** Choose if the item is related to a specific course. Select items only.
c. **Assignee:** Leave as “unassigned” if you do not know who should receive it. It automatically routes to the student’s advisor(s) and/or appropriate office on campus. Select items only, based on your permissions to that Tracking Item (note that Kudos cannot be assigned).
   i. **Me:** Assign to yourself if you are the person who needs to work with the student on the issue.
   ii. If you know the campus partner to receive the tracking item, and they have a relationship with the student in NYU Connect and access to the specific type of item, you can directly assign the item to them.
   iii. The number next to the provider name is the number of active tracking items they currently have assigned to them.

![Assignee Image]

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d. **Comment:** Enter in more information about why you are raising the Tracking Item.
   i. Note that for some Flags, comments are required.
   ii. For some items, a default comment will display. You can use this text and/or personalize it.
   iii. Students will not be able to see the comments unless they request to do so under FERPA.

![Comment Image]

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5. Click “Save” when done. You will receive a popup confirmation.
Working on a Tracking Item

1. When in the Student Folder, click on the “Tracking” menu item on the left navigation bar.
2. Hover over the Tracking Item you wish to work on.

3. Depending on the tracking item type you have the options to:
   a. **Edit** to change the Tracking Item.
   b. **Comment** to add more information. When commenting, you can elect to send a comment to the Flag raiser and/or the student.
      i. To comment: Enter a subject (for internal purposes only) and the comment itself.
   c. **Assign** for flags only.
   d. If you send a copy to the student, you will be able to tell if/when they read the email that was generated by the comment. Clicking on the Notes Details +. If read by the student, you will see the date and time on the right hand side of the screen.
Clearing/Resolving a Tracking Item

1. In the Student Folder, hover over the tracking item icon you want to clear.
2. 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.
   a. Add a comment as appropriate.
   b. Close the loop by sending the Flag raiser a message regarding why you are clearing/resolving the Flag.
      i. It is highly recommended that you do this so the raiser knows their concern has been addressed. This note will be sent to the Flag raiser via email. They (and other providers) can see this in the Flag Journal.
4. All other tracking items: add a comment as appropriate.
5. Click “Submit.”
6. 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.

Notes

1. Navigate to the student's folder and click on the “Notes” left-sidebar menu.
2. All notes you have access to view will appear. You can use the filters to narrow the notes you see.
   a. Notes can be related to a tracking item, an appointment, an advising session, and more.
3. Click the + button to expand a note to view full content.
Creating Notes

1. Navigate to the student's folder and click the “Note” button on the top of the folder.
2. Select a Note type from the drop down of notes you are able to create.

3. The date of the Note will default to today's date. You can change, if needed.
4. Enter a subject for the note.
   a. This is internal to the system.
5. Enter the body of the note.
   a. You can elect to send a copy to yourself via email, and/or to the student. If you send a copy to the student, the subject line will be “A Message to You from NYU Connect” and will be from your email address.

   ![Create Note screenshot]

   b. You can see if/when the student read your email by clicking on the Notes Details +. If read by the student, you will see the date and time on the right hand side of the screen.

   ![Notes Details + screenshot]

   c. Note: Schools and departments will have specific recommendations on documenting Notes. Please refer to your advising office.

6. Select if a Note should be Shared to all who have a connection with the student and who have permissions to view Notes. 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.

7. Click “Submit.”

**Additional NYU Connect Training**

Learn more about these features:

- On ILearn: search search for “SSC” courses for overviews of the Basics, Notes, Flags/Kudos and the Student folder
- With an in-house training session. We are happy to come to you, just ask!

Email nyuconnect@nyu.edu.