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Accessing the Panther Success Network

To access the Panther Success Network, log into myFIU or Campus Solutions using your FIU username or Panther ID and password.

Following successful log-in, confirm that what is being shown is the Advisor page.

To change to the Advisor page, you will find the Role Menu at the top of the page. Select the Advisor role.

You will be redirected to the Advisor homepage.

Select the Success Network tile.
You will now be redirected to the Panther Success Network landing page.

Click on the Go to Panther Success Network button.

You will be redirected to the Panther Success Network log-in page.

Proceed to log-in using your FIU Panther ID # or username and password.

**Viewing Your Caseload**

The students in your caseload can be viewed on the home page. The caseload table defaults to the current term.
To view your complete caseload, select between “My Assigned Students for [Current Term]” or “My Assigned Students All Terms,” found in the dropdown menu.

Active students are placed in either of these populations depending on whether they are currently enrolled in courses.

In the caseload table, you will see the total number of students in your caseload. This information is located at the bottom right hand corner.

**Viewing a Student Profile**

There are two methods to viewing a student’s profile:

1) Click on the student’s name in your caseload.

You will be redirected to the student’s profile page.
2) Click on the magnifying glass icon found at the top right hand corner of the page.

The **Quick Search** box will appear. You can search for the student by typing in their name or Panther ID.

A list of students’ names will appear in a dropdown menu.

Select the name of the student whose profile you wish to view.

You will be redirected to the student’s profile page.

On the student’s profile page, you will see a series of tabs: **Overview, Success Progress, History, Class Info, Major Explorer, Path and more.**

The **Overview** tab provides a breakdown of the following information:

- Course Grade D/F
- Repeated Courses
- Withdrawn Courses
- Cumulative GPA
- Total Credits Earned (hover mouse over icon)
- Credit Completion % at this institution (hover mouse over icon)
You can also view the following information on the student’s home page:

- Current major
- Any previously declared major
- Panther ID
- Classification
- Most Recent Enrollment Term
- Advisor Name
- Goals & Interests
- Categories
- Tags

The **Success Progress** tab shows you a breakdown of:

- Success Markers (to be added at a later date)
- GPA Trends by Term
- Credit Trends by Term
- Chronological list of GPA, Credits Attempted, and Credits Completed
The History tab allows you to view Reminders, Notes, Cases, Alerts, Progress Reports, Advising Reports, Tutor Reports, and Visits to Support Centers.

You can also filter the student's History by clicking on the drop down menu and selecting from the list what you wish to see.
The *Class Info* tab shows you the student's courses they are currently enrolled in as well as future courses they are enrolled in.

The *Term Details* include a semester-by-semester breakdown of their courses as well as grades received, GPA, and Academic Standing.

Below the *Term Details* you will find the student's *High School / Pre-College* data.
The Major Explorer tab details the student's major and careers related to the degree.

Additionally, you will see other potential major options and related careers.

Current Major

**Biological Sciences - BS**

Col of Arts, Sciences & Education

Search For Majors And Careers

Related Careers

- Biochemist
- Biological Technician
- Biologist
- Biomedical Engineer
- Biostatistician
- 12 More...

Major Options

College:

- All Colleges

<table>
<thead>
<tr>
<th>Major Name</th>
<th>Related Careers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accounting - BAcc</strong></td>
<td>Accountant, Accounting Supervisor, Accounts Payable/Receivable Manager, Actuary, Auditor, 30 More...</td>
</tr>
<tr>
<td>College of Business</td>
<td></td>
</tr>
<tr>
<td><strong>Accounting - MAcc</strong></td>
<td>Accountant, Accounting Supervisor, Accounts Payable/Receivable Manager, Actuary, Auditor, 30 More...</td>
</tr>
<tr>
<td>College of Business</td>
<td></td>
</tr>
</tbody>
</table>
The Path tab will show you the student's responses to the onboarding questionnaire students submit when downloading the Navigate Student mobile application. You will also see important to-do items and dates that apply to the student.

Within the More tab, you will find Calendar, Study Hall, Appointments and Conversations.

Samantha Abud

Current Major
Viewing Your Conversations

You can access your Conversations by clicking on the Envelope icon located on the left-hand toolbar.

You will be redirected to the My Conversations page.

Here you will see all Messages sent and received.

You can filter your messages by:
- clicking on the View Personal Messages Only box
- clicking on the View Unread Only box
- Search by Users

<table>
<thead>
<tr>
<th>SENDER</th>
<th>COUNT</th>
<th>TOPIC</th>
<th>DATE SENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Samir, Anchita</td>
<td></td>
<td>Follow up email</td>
<td>08/14/2019 01:04 PM</td>
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<tr>
<td>Varegas, Alexandra</td>
<td></td>
<td>Organic Chem 1</td>
<td>08/14/2019 02:04 AM</td>
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<tr>
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<td>FIN 1982</td>
<td>08/13/2019 10:21 PM</td>
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<td>Zambrano, Jacqueline</td>
<td></td>
<td>Course Enrollment</td>
<td>08/13/2019 07:17 PM</td>
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<td>Waur, Jennifer</td>
<td></td>
<td>R: Fall Enrollment Question</td>
<td>08/13/2019 02:08 PM</td>
</tr>
</tbody>
</table>

Reading Your Messages

When you receive a message in your My Conversations inbox, click on the message Topic to open.

You will be redirected to the message where you are able to read it.

If you wish to return back to the My Conversations page to see the list of messages in your inbox, click on Back to My Conversations. This will redirect you back.
Responding to Your Messages

When you read a message, click on the reply arrow icon.

Fill in all applicable information in your return message.

Attach any relevant documentation if necessary.

Click on Send Message.

Creating Your Appointment Availability

On the Advisor home page, you will find the My Availability tab. The Times Available table lists all of your appointment availabilities. Each availability can be set up for different appointment types, locations, date periods, days of the week and times.

To create a new time availability, select Add Time found in the Actions menu on the top left-hand corner of the Available Times.
Times table.

The Add Availability pop-up window will open.

Select details that are applicable to this availability:

- Days of the week
- Time Frame
- Duration of Availability
- Availability Type (Drop-in, Appointments or Campaigns)
- Care Unit
- Location (Appointment Center location)
- Service
Note: Specify Office Location inside of Special Instructions for Student box. This location or information will be reflected in the appointment confirmation when appointments are made.

Designate the maximum number of students per appointment you will be seeing during this availability. If you wish to create Group Advising availability, specify for multiple students.

Click Save.

Note: An availability must be made for each Time Frame, Availability Reason, Location, and Student Service provided.

Copying an Appointment Availability

To copy Appointment Availabilities, select the Availability you wish to copy from the Available Times table.

Click on Copy Time from the Actions drop down menu.

The Copy and Add Availability window will open. This will reflect the original time frame and Student Service designated from the previous Availability made.
Make all the applicable changes to the Availability.

Note: Remember to Specify Office Location for this Availability as well. It will also be specified in the appointment confirmation.

Click Save.

Deleting an Appointment Availability

To delete Appointment Availability, select the Availability you wish to delete from the Available Times table.

Click on Delete Time from the Actions drop down menu.

A yellow banner will appear at the top of your screen confirming this action.
Viewing Your Calendar

On the left-hand toolbar, you will be able to access your Calendar by clicking on the Calendar icon. You will be redirected to the My Calendar page.

The Calendar assigns a color to each type of event, e.g. Advising Appointments, General, Free Busy, Cancelled, etc.

At the top of the Calendar, you will find boxes for the different categories of events. Checking off these boxes allows you to filter the events by category.

Additionally, you are able to navigate your Calendar by utilizing the Today, Day, Week, Month buttons at the top right-hand corner of the Calendar.
Viewing Your Calendar (List View)

There is a list view of your Calendar that can be accessed by clicking on the List of Calendar Items tab.

This view organizes the events in your schedule by separating them within Today, This Week and Next Week.

Syncing your Outlook Calendar

One the left-hand toolbar, you will find the Calendar icon. Click to open the My Calendar.

To begin process of syncing your Outlook Calendar with the Panther Success Network, click on the Settings and Sync button found below the Panther Success Network logo.

You will be redirected to the Calendar Settings page.
Click on the **Setup Sync…** button.

Select the *Microsoft Outlook* option from the list of Calendar Applications.

Click on the *Outlook Service Accounts* button.

**Calendar Settings**

**Calendar Settings: Setup**

Please Choose Your Calendar Application:

- Microsoft Outlook
- Google Calendar
- Other Applications

Choose Sync For Microsoft Outlook:

- **Outlook Service Accounts**
  Will be deprecated in 2020.

  Go back…
A yellow banner will appear at the top of the page confirming that the sync has begun.

Once the sync completes, your calendar sync will refresh automatically. On the Calendar Settings page, you will be able to see the date and time of the last refresh.

Adding Events to Your Calendar

At the top right-hand corner of Calendar View you will see the Add Calendar Events button.

To initiate this process, press the Add Calendar Events button. You will be redirected to the Schedule Appointment page.

You will be redirected to the Schedule Appointment page.
Specify the following:
- Care Unit
- Location
- Service
- Date of Appointment

Add the name of the student that you will be meeting with on the date that you selected. You will add the student by typing in his/her name to the Add an Attendee box.
If you wish to add any other persons to the appointment, continue to add these persons by typing their names into the "Add an Attendee" box.

Confirm that your name is selected in the "Select an Organizer" table.

Specify the length of the advising appointment to view the schedule of appointment times.

Select the desired appointment time.

Select if the appointment should repeat and its frequency.

Click on "Save Appointment."
Creating an Advising Appointment on Behalf of the Student

Option 1
To create an Advising Appointment, first, select student name from your caseload.

Click on the Actions dropdown menu and select Schedule Appointment. You will be redirected to the Schedule Appointment page.
Select the following:
- Care Unit
- Location
- Service
- Course (if applicable)
- Comments (if applicable)
- Date of Appointment

You will now see to the right, a list of the people attending this appointment. You may add additional attendees if you would like by typing the person’s name in the Add an Attendee box on the right.

If you do not wish to add attendees, click on your name (as Advisor) in the Select an Organizer table below this list.

Specify the length of the advising appointment.

Select the desired appointment time.

Select if you wish this appointment to repeat. If so, please select from the Repeat dropdown menu.

Click on Save Appointment
Option 2
To make an appointment on behalf of the student click on the student's name in your caseload. You will be redirected to the Student Profile Page.

On the student's profile page, you will see the I want to... menu on the right-hand side of your browser's window. To begin scheduling an appointment, click on the Schedule an Appointment link.
Select the following:
- Care Unit
- Location
- Service
- Course (if applicable)
- Comments (if applicable)
- Date of Appointment

You will now see to the right, a list of the people attending this appointment. You may add additional attendees if you would like by typing the person’s name in the Add an Attendee box on the right.

If you do not wish to add attendees, click on your name (as Advisor) in the Select an Organizer table below this list.

Specify the length of the advising appointment.

Select the desired appointment time.

Select if you wish this appointment to repeat. If so, please select from the Repeat dropdown menu.

Click on Save Appointment.
Creating an Advising Appointment Summary for Students With a Scheduled Appointment

Option 1

To create an Advising Appointment Summary for a student with a scheduled appointment, first, select the appointment listed in your Recent Appointments table found at the bottom of your PSN homepage.

Click on the Actions Menu and select Add Appointment Summary from the list.

A pop-up window with the advisor report form will open.

Verify the following information and fill out any missing information as appropriate:
- Care Unit
- Location
- Service
- Date of Visit
- Meeting Times (Begin and End)
- Student Check-In and Check-Out times

Pay close attention in filling out the Summary Details and Advisor Comments.

You will now be able to personalize the Advisor Comments using the formatting menu at the top of the comments box.

Click on Save this Report to submit.
Option 2
To create an Advising Appointment Summary for an appointment that has been checked in at your advising location, click on the graduate icon found at the top of the PSN site.

You will now see the Appointment Queue that lists the student(s) that are waiting to see you. Click on the Start Appt link.

A pop-up window with the advisor report form will open.

Fill in or Select applicable information:
- Care Unit
- Location
- Service
- Date of Visit
- Meeting Times (Begin and End)
- Student Check-In and Check-Out times

Pay close attention in filling out the Summary Details and Advisor Comments.

You will now be able to personalize the Advisor Comments using the formatting menu at the top of the comments box.

Click on Save this Report to submit.
Creating an Advising Appointment Summary for Students Without an Appointment

Option 1
To create an Advising Appointment Summary, first, select student name from your caseload.

Click on the Actions dropdown menu and select Create Advising Appointment Summary.

A pop-up window with the advisor report form will open.

Fill in or Select applicable information:
- Care Unit
- Location
- Service
- Date of Visit
- Meeting Times (Begin and End)
- Student Check-In and Check-Out times

Pay close attention in filling out the Summary Details and Advisor Comments.

You will now be able to personalize the Advisor Comments using the formatting menu at the top of the comments box.

Click on Save this Report to submit.
Option 2
Click on the student’s name in your caseload. You will be redirected to the Student Profile Page.

To create an Advising Appointment Report, click on the Report On Appointment link to the right of the Overview page.

A pop-up window with the advisor report form will open.

Fill in or Select applicable information:

- Care Unit
- Location
- Service
- Date of Visit
- Meeting Times (Begin and End)
- Student Check-In and Check-Out times

Pay close attention in filling out the Summary Details and Advisor Comments.

You will now be able to personalize the Advisor Comments using the formatting menu at the top of the comments box.

Click on Save this Report to submit.
Marking an Appointment as a No-Show

To designate a scheduled appointment as a **No-Show**, select the appointment from the Recent Appointments table found on your PSN homepage.

Open the *Actions* menu located at the top left-hand corner of your Recent Appointments table and select *Mark No-Show*. 
An Appointment Report form will open. You will notice that the student is not marked as Attended. Enter any applicable comments (optional) and click on the Save this Report button.

You will notice that the Report File status is now reflected as No Show.
Creating an Advising Note

Option 1
To create an Advising Note first, select student name from your caseload.

Click on the Actions dropdown menu and select Note. A pop-up window with the Note formulary will open.

Fill in applicable information:
- Comments (required)
- Note Reason

If, applicable, attach any relevant documentation.

Note: Pay close attention to the Visibility options:
- [Advisor's Name] Only - Allows the author (you) of the Note to be the only one to view. (Not Recommended).
- Student – Allows the student to view Note.
- Printed Student

Click on Save Note.
Option 2
To enter a Note for a student, click on the student's name in your caseload. You will be redirected to the Student Profile Page.

From the Student Profile Page, click on the Add a Note on this Student link to the right of the Overview page. A pop-up window with the Note formulary will open.

Fill in applicable information:
- **Note** (required)
- **Note Reason** from dropdown menu

If applicable, attach any relevant documentation.

**Note:** Pay close attention to the Visibility options:
- [Advisor’s Name] Only - Allows the author (you) of the Note to be the only one to view. (Not Recommended).
- Student – Allows the student to view Note.
- Printed Student Report (Currently Not Functioning)

Click on Save Note.
Creating a Watch List

To create a new Watch List, click on the Post-It icon found on the left-hand toolbar.

You will be redirected to the Watch List and Saved Searches page.

Click on New Watch List button on the top right-hand corner of the Watch List table.

You will be redirected to the Adding New Watch List page.

Type in Name of Watch List.

Click on Save Watch List.
Adding a Student to a Watch List

Option 1
To add a student to a Watch List, first, select student name from your caseload.

Click on the Actions dropdown menu and select Watch.

A pop-up window will open listing your Watch Lists. Select the Watch List you wish to add the student to and click on Save button.
Option 2
To add a student to a Watch List, click on the student’s name in your caseload. You will be redirected to the Student Profile Page.

From the Student Profile Page, click on the Add to Watch List link to the right of the Overview page.

A pop-up window will open listing your Watch Lists. Select the Watch List you wish to add the student to and click on the Save button.
Removing a Student from a Watch List

To remove a student from a Watch List, first, select student name from your caseload.

Click on the Actions dropdown menu and select Watch.

A pop-up window will open listing your Watch Lists. Uncheck the Watch List you wish to remove the student from and click on the Save button.
Creating an Advising Appointment Campaign

Note: Prior to creating an Advising Appointment Campaign, you must first save an Appointment Availability, using the Campaign Initiated Appointment.

To access the Campaign function, click on the Campaigns Logo on the left-hand toolbar. You will be redirected to the Appointment Campaign page for the current term.

To begin your Campaign, click on the Appointment Campaign link on the right-hand side of the page in the Actions menu.

Customizing Your Campaign

You will be redirected to Define your Campaign. By defining your Campaign, you can customize your Campaign.

Fill in the field and click on the Continue button.
Selecting Your Student Population

A - If you wish to include all students in your Campaign, select *Invite All My Assigned Students*. You will be asked to confirm your selection.

If you wish to include only a specific student population, select *Advanced Search*. Here you select criteria to isolate students that you wish to meet with. After confirmation, you will be given the opportunity to *Review* the list of students included in the Campaign. To edit, you can either remove or add students.

To remove students from the list, select the name(s) of the student(s) that you wish to remove.

Click on the *Remove Selected Users* button in the Action Menu found on the top left corner of the table.

The list of students’ names will automatically be updated.
To add students to the list, click on the **Add More Students** link at the bottom of the table. You will be redirected to the **Add Students to Campaign** page.

B - If you select the **Advanced Search**: You will be redirected to the **Add Students to Campaign** page.

Begin by selecting whether you wish to limit the student population to your assigned caseload. Select the **My Students Only** option at the bottom of the page by the **Search** button.

Select the criteria you wish to apply to the **Campaign**.

Click on the **Search** button.
You will now receive a list of students that will be included in the Campaign.

Select the students that you wish to include. If you wish to include all students, select the All option at the top of the list.

You will also have the opportunity to remove students from this list as well. Select the student(s) name(s) and click on Remove Selected Users in the Actions Menu.

Click on the Continue button to move forward.

You will now be redirected to the Add Advisors to Campaign page.

Select your name from the list.

Click on Continue button.

Composing Your Campaign's Message

By default, you will see that there is a message provided for you that can be used as part of your Campaign. You can, however, customize the message to suit your needs.

To customize the message, you can make changes to the overall text and attach files to the email that your students will receive.

You will see below this text box what your message will look like in the preview.
Press **Continue** once you have finalized your message.

### Confirming Your Campaign

Once you have composed your Campaign’s message, you will receive a Summary of your Campaign. Review the information and press **Send** to complete your Campaign.

### Confirm Send Invitations Now

Are you sure you want to send invitations to 196 students?

- **Cancel**
- **Send Invitations Now**
Note: What Your Student Sees

Your students will receive both an email and a yellow banner will be placed on their homepage. This will be visible when the student logs onto the Panther Success Network.

To schedule an appointment, the student will click on the Schedule This Appointment button on the yellow banner and follow the instructions.

Creating a Reminder for a Student

To create a Reminder for a student, click on the student's name in your caseload. You will be redirected to the Student Profile Page.

From the Student Profile Page, click on the Add a Reminder to this Student link to the right of the Overview page.
A pop-up window with the Add to Watch List formulary will open.

Type in the Reminder topic and Due Date.

Click on Save Reminder button.

Editing a Reminder for a Student

To edit a Reminder, pushpin icon on left-hand toolbar.

You will be redirected to the My Reminders Page.

Click on the Edit link to the right of the Reminder you wish to edit.

My Reminders

Upcoming And Overdue Reminders

<table>
<thead>
<tr>
<th>Actions</th>
<th>REMINDER</th>
<th>STUDENT</th>
<th>DATE</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Pending Accelerated Credits</td>
<td>Samantha</td>
<td>09/02</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Previous 1 Next
The Edit Reminder pop-up will open. Make all necessary changes to the Reminder and click on Save Reminder.

Deleting a Reminder for a Student

If create a Reminder by mistake, you may delete it from your Upcoming and Overdue Reminders table.

Click on the right pushpin icon on the left-hand toolbar.

You will be redirected to the My Reminders page.

Select the Reminder that is to be deleted.

Click on Deleted Selected Reminders found in the Actions dropdown menu.
Performing Advanced Searches

To perform a Search, select the magnifying glass on the left-hand tool bar. You will be redirected to the Search page.

The Search engine allows you to search for select populations using the different filters available. Click on “Show Advanced Filters”, located on the top right-hand corner of the New Search table.

From here, you can add or remove filters to personalize the search you are conducting. Each individual category can be expanded to input more search criteria.

Click on the My Students Only box to narrow the student population to only your assigned caseload. Otherwise, you will be receiving search results from all active students in the university.

Click on Search.
Saving Advanced Searches

To save a Search that you have conducted, click on the Save button located at the top of your Unsaved Student Search.

The Save Search pop-up will open.

Name the Search and Click on Save Search.

Accessing your Saved Searches

To access your Saved Searches, click on the Saved Searches dropdown menu located in the Search page.
Advising Students using the Appointment Queue System

The Appointment Queue system alerts you when there is a student waiting to be seen.

When students are checked-in by the Front Desk Staff, you will receive a notification at the top of your screen.

Clicking on this icon will allow you to see all students that waiting to be seen.
To begin an appointment, select Start Appt.
The Advisor Summary for this student will open. In the Advisor Report, you can fill out all the information necessary for the appointment such as:

- Care Unit
- Reason
- Any courses that were discussed
- Date of the visit
- Location
- Advisor and student attendees
- Report details
- Advisor Comments

Note: The Advisor Report Appointment Details will specify if the student had a scheduled appointment or is a drop-in.

Once all information has been entered into the Advisor Report, click on Save This Report.

Note: During the appointment, if you need to view the student’s profile, you can minimize the report.

You will see a notification reminding you of the Advisor Report at the top of your page over the Window icon.

Select the icon and click on the Advisor Report link for the student to re-open it.

Once an Advisor Report has been saved, the student will be checked out of the appointment queue.
Issuing a College Life Coaching Referral

To refer a student to College Life Coaching, choose one of the following options available.

**Option 1**
Click on the *Issue an Alert* link found in the *Actions* table below the *Panther Success Network (PSN)* logo.

The *Issue an Alert* pop-up window will open.

Enter the student’s Panther ID number or name and select from the list that appears.

Select the *College Life Coaching Referral* reason.

Provide supporting details as to why student would benefit from attending College Life Coaching (CLC) sessions.

Click on *Submit* button to save.

**Option 2**
Select the name of the student from your caseload list.
Open the Actions Menu and select Issue Alert from the list of possible functions.

The Issue an Alert pop-up window will open.

Enter the student’s Panther ID number or name and select from list that appears.

Select the College Life Coaching Referral reason.

Provide supporting details as to why student would benefit from attending College Life Coaching (CLC) sessions.

Click on Submit button to save.
Option 3
From inside of the student's profile, click on the Issue an Alert link found in the Actions table below the Panther Success Network (PSN) logo.

The Issue an Alert pop-up window will open.

Enter the student’s Panther ID number or name and select from list that appears.

Select the College Life Coaching Referral reason.

Provide supporting details as to why student would benefit from attending College Life Coaching (CLC) sessions.

Click on Submit button to save.

Viewing the Status of a Case
Opened from a College Life Coaching Referral Alert

To view the case status of a College Life Coaching Referral you submitted on behalf of a student, select the Case icon on the left-hand tool bar.

You will be redirected to the Cases page, which will display a list of Open cases by default.

Click on the Manage Case

A Moody College of Science Student
Enrollment and Advising
The Manage Case form will open. You will be able to view any comments entered by the student's coach.

The Case will be closed by the College Life Coaching Manager. Please, do not close the case.

If you have questions after reviewing this tutorial, please contact Advising Technology at advtech@fiu.edu.