**Module 2:  New Users – Working with Individual Student Prioritization and Case Studies**

**Module Description:** In this hands-on Module, using case studies, new Direct-Connect faculty/staff will work inside MAP- Works to practice logging Activity and learning methods of prioritizing outreach.

**Main Concepts:**

- Using the High Priority Student List
- Setting Follow-Up Date
- Issuing a Referral
- Sorting Student Tracking Screen

**Log-In Information for North State University**

- URL: http://demo.map-works.com
- Login: _____
- Password: 1012014

For this Module, you will log in as: _____

## Task 1: How many High Priority Students are there? _____

You have 30 minutes between appointments and want to use the time to reach out to students who may need support. Use MAP-Works to determine how many at-risk students have had no interaction contacts logged.

> **Hint:** Home Page

**Step by Step:**

1. On the Home Page, look for the "High Priority Students" box in the upper left corner

## Task 2: On the Student Tracking Screen/High Priority Students list, who is the first student on the list and when did that student last have faculty/staff activity? _____

Again, using your 30 minutes between appointments, you plan to quickly use MAP-Works to prioritize students and learn something about them.

> **Hint:** "View Students" button in the High Priority Students box

**Step by Step:**

1. On the Home Page, look for the "High Priority Students" box in the upper left corner
2. Click the "View Students" button in the "High Priority Students" box, which selects only the high priority students and takes you to the student tracking screen
3. Look at the top of the list
4. Look at the column titled "Last Activity Logged"

**Choose a Red or Red2 student with no follow-up date**

**Student Name:** _____

**Task 3: Set a follow-up date**

**Task 4: Log an Activity (a phone conversation)**

**Task 5: Issue a referral to the Peer Mentor with Hall Director or Commuter Advisor as an Interested Party**

You have chosen a student and had a phone conversation with that student. Now, you want to set a date to check in with the student, make a record of the conversation, and get the student's peer mentor involved and make the student's Hall Director or Commuter Advisor aware.

> **Hints:**
> - Use the columns on the "Student Tracking Screen"
> - Click on a student's name to get a pull-down menu
> - For training purposes, begin any comment, description, etc. with your initials so that you can easily spot your work

> **Step by Step:**
> 1. On the "Student Tracking Screen" tab, look at the "High Priority Students"
> 2. To determine if a student has a follow-up date, go to the column labeled "Follow-Up Status" and look for "Not Set"
> 3. To change the follow-up date, click on "Not Set" (You can also click on the student's name and choose "Set Follow-up Status" from the pull-down menu)
>    a. "Scheduled" in the status box
>    b. Choose a date in the "Follow-Up Date" box
>    c. Decide if you would like to set a reminder or to add the follow up to your Outlook calendar
>    d. Click "Save." You should see the change on your tracking screen in the "Follow-Up Status" column
> 4. To log an activity, there are two options:
>    a. Under the "Quick Log Activity" column, hover over "log" and choose the type of activity from the pull-down menu
>       i. The student will disappear from the High Priority list
>    b. Under the "Log Activity" column, click on "log"
>       i. Be sure to use the "Contact" tab
>       ii. Choose a category for the contact
>       iii. Write a comment in the Add Activity box at the top
>       iv. Click "Save"
>       v. When you log the contact, the student may disappear from the High Priority list (it depends on the date of your activity and the date of the risk indicator)
> 5. To issue a referral, use the "Student Search" box to find the student
>    a. Choose the "Activity" tab underneath the student's name and Risk Indicator
>       i. Click inside the Add Activity box and a pop-up will appear

        ii.      Click on the arrow icon from the menu which will open the Referral box

b.      Type the referral content into the Add Activity box

c.      Select a Category

d.      Assign to the Peer Mentor

e.      Choose either the Hall Director or the Commuter Advisor as the "Interested Party".

f.      Answer questions (based on your imaginary conversation)

g.      Keep "Open" as the Status and click "Public"

h.      Click "Save"

## Task 6: Of all the students, who would be the first student sorted alphabetically? _____

You want to review your MAP-Works student list in alphabetical order.

**Hints:**

- On the Student Tracking Screen, make sure you have "All My Students" in the drop-down box at the top of the page
- Every column is sortable

**Step by Step:**

1. Click on "Student Tracking" at the top of the page
2. Change (or confirm) that the drop-down box at the top of the page says "All My Students"
3. In the first column titled "Students," click on the subcolumn header "Name." The list will sort by name if it was not already.
4. Look at the first student on the list