Education Advisory Board

EAB Student Success Collaborative

User Guide

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Introducing the Advising Application

Overview

Education Advisory Board's Student Success Collaborative

Combines technology, research, and predictive analytics to help institutions positively inflect degree completion outcomes for at-risk students.

The Advising Application

The advising application is the tool EAB's Student Success Collaborative uses to inflect student outcomes. The application is designed around a three-stage model: triage, assess, and intervene.

- Triage: using work lists, student status, and other risk identifiers, advisors can proactively find students in need of help instead of waiting for students to come to them or reactively reaching out after the student is actually failing.
- Assess: student profiles show key trends that contribute to outcomes such as GPA trend, credit accumulation, and student performance. The data is shown in a way that highlights issues most likely to cause risk to the student's outcome, such as poor performance in a key course or a declining GPA trend, making it easier for the advisor to suggest solutions.
- Intervene: the student profile gives the advisor several ways to reach out to the student and note these interventions, as well as set reminders for follow up with the student.

This Document

This reference is meant to give instructions on how to perform actions in the advising application to effectively use the system to intervene with at-risk students. This includes:

- Initial steps to log in to the system
- Assessing student performance and risk through the profile
- Understanding statuses and notifications
- Recording interventions with students
- Understanding and creating student work lists

Initial Steps

The university administrator will send users the email with the initial log in information. Users will then begin their first log in to the advising application. Currently, Internet Explorer 9 and Firefox 16 are supported browsers when used with Windows 7.To set up an account:

1. Open the link that is included with the initial log in information.
2. Select a trusted image from the options provided.
3. Create a password. Passwords must be between 8 and 25 characters and have all 4 of the following: upper case letters, lower case letters, numbers, and special characters (#$*@#). It cannot use 3 or more characters of your user name.

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Once users have selected a trusted image and password, to log in to the advising application:

1. Open the log-in page, **https://ssc.advisory.com**
2. Enter user name and click **Continue**.
3. Verify the trusted image and click **Yes**.
4. Enter the password and click **Sign In**.

Users will then be signed in to the advising application. If the user has questions about common log-in issues, they should consult the sign-in FAQs on the log in page or the appendix of this document.

Your institution may also skip these steps by using single sign-on, which allows advisors to sign in using their university login information. For more information about using single sign-on, your institutional administrator should talk to your consultant.

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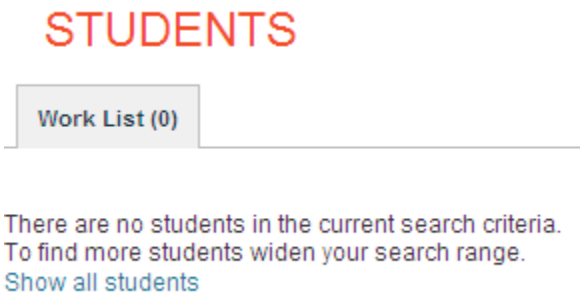
Student Work Lists

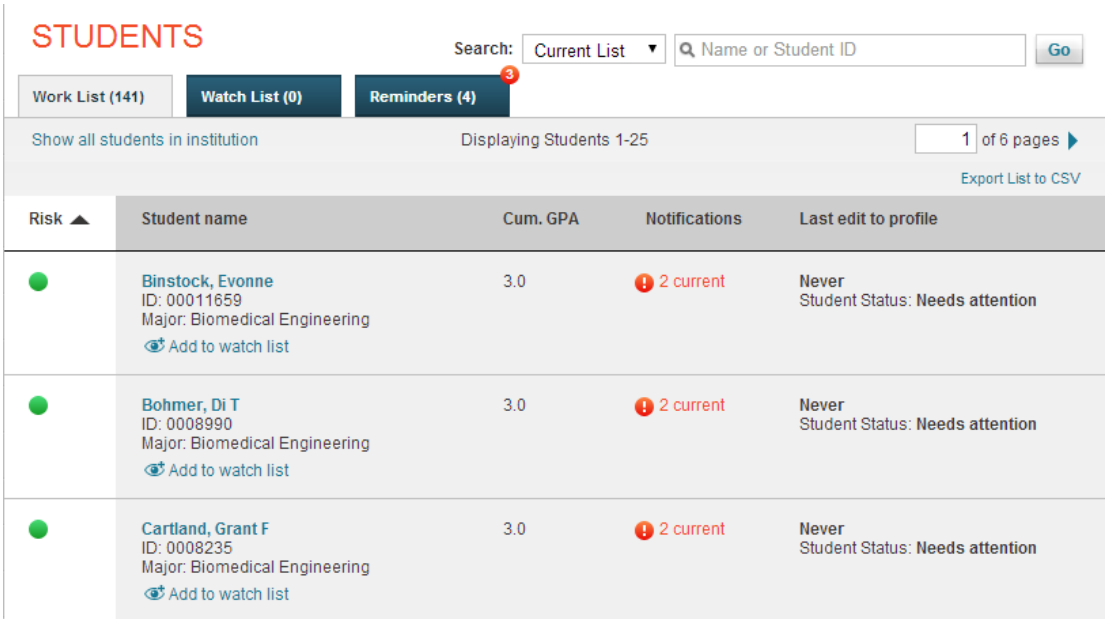
Overview

Work lists enable advisors to triage their workload by seeing which students need attention, creating specialized lists for proactive outreach, and quickly finding information on individual students.

When advisors log in, the student work list they will see depends on institutional settings. Some will have a list that is restricted by major. Otherwise, they will see a blank screen explaining they have no list and that they should expand to see All Students and/or create a work list.



Once advisors have created at least one work list, they will see a default work list upon login, which will sort students by their last name. Before a list is created, the advisor can click **Show all students in institution** to see all students.



Advisors can create student work lists or search for individuals on this page. They may also sort the default list by risk, cumulative GPA, number of notifications, and last edit to profile.

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To search for an individual student, enter all or part of a name or Student ID in the search box and click **Go.** Once the advisor has created a work list, he or she has the option of searching from the Current List or All Students. Make sure to select the correct list from the dropdown search menu.

Creating Work Lists

Advisors can create multiple work lists that serve as a filter for students.

To create a student work list:

1. Open the Student tab. Click **Create a new list**.
2. The Refine List screen opens. This contains multiple criteria to filter your new list, including Major, Concentration, Degree, Risk, Student Classification, Student Status, Enrollment, # of notifications, et cetera. Lists can also be filtered by institution-defined advising groups. The filters are categorized to make them easier to find.

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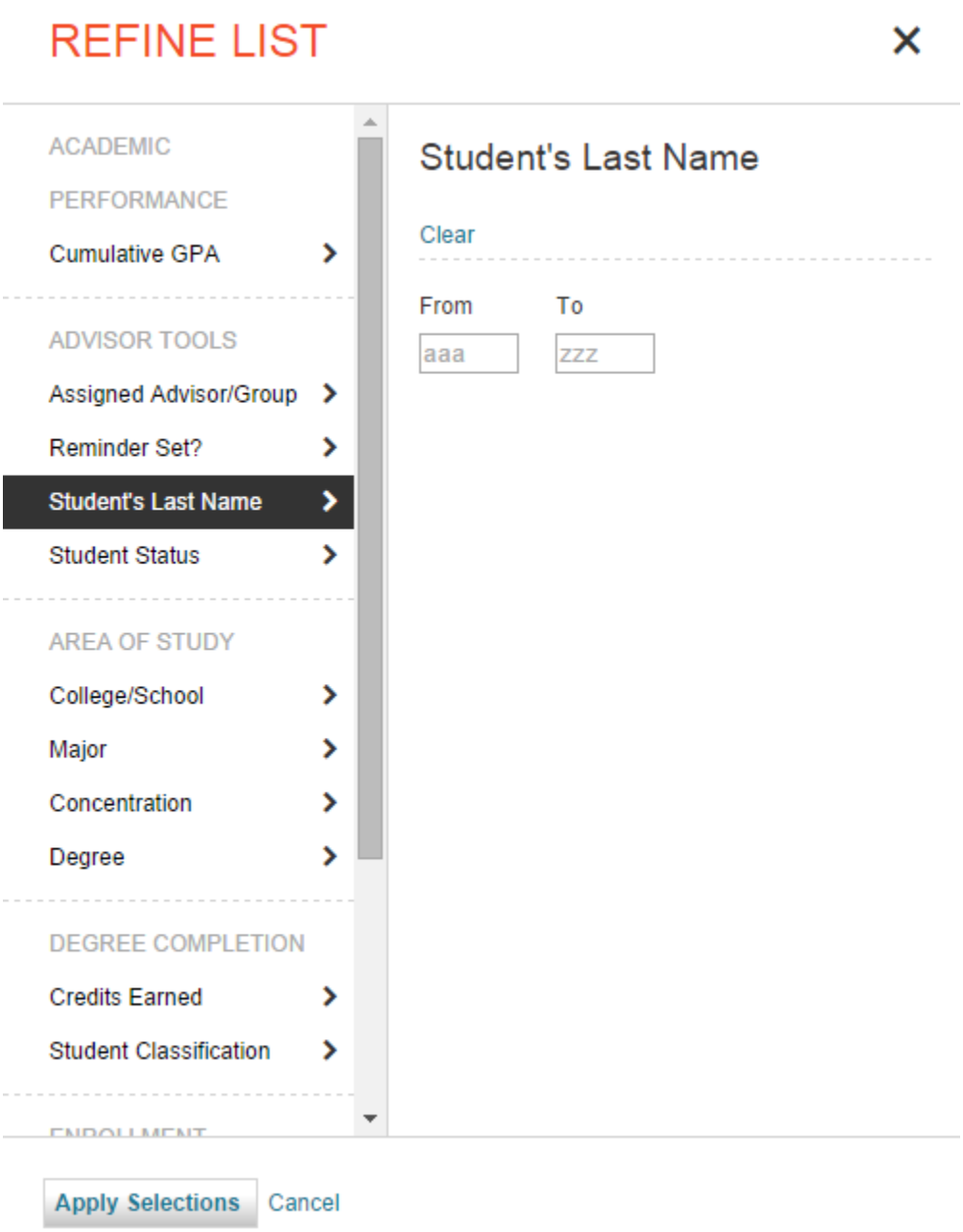
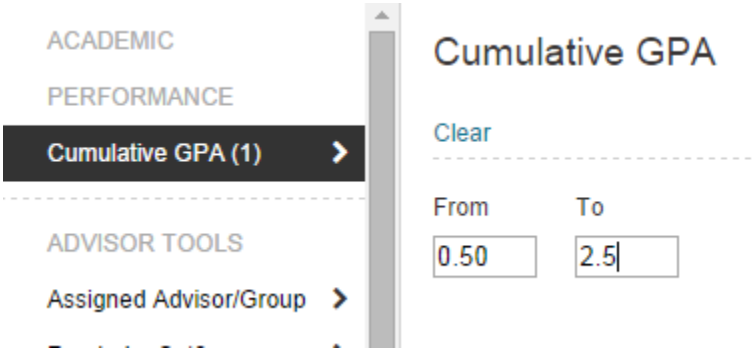


3. Select the criteria from the options provided by clicking on a category and setting ranges. You can select multiple criteria to create your work list. Filters are additive; students must match all criteria to be placed on the work list.



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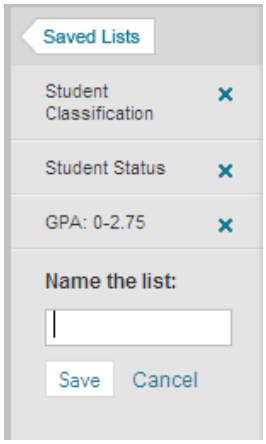
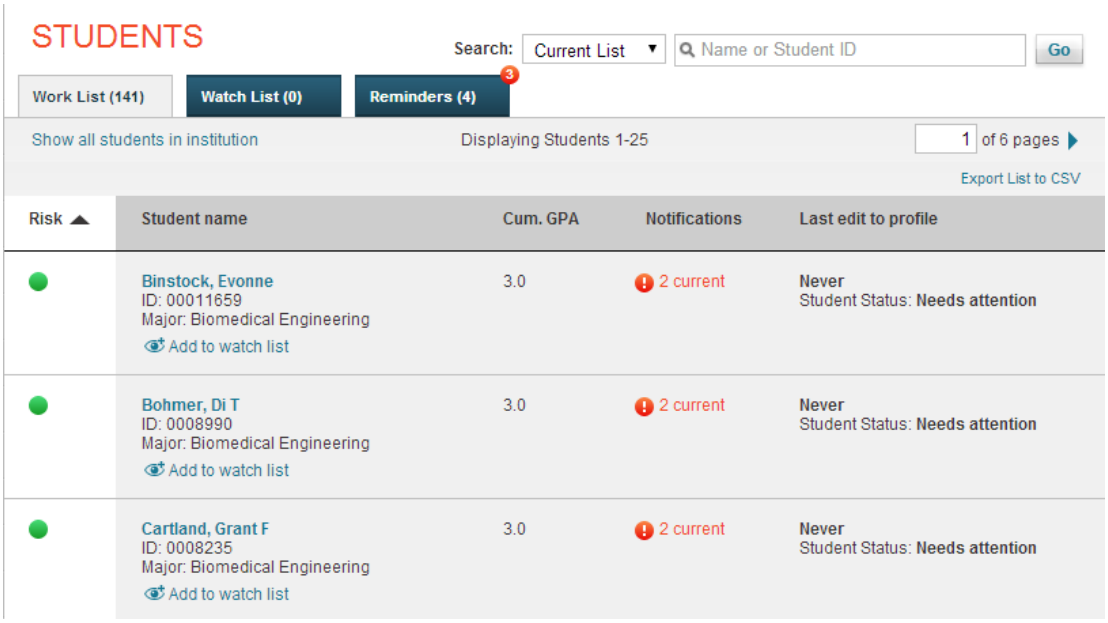
4. Once finished making work list selections, click **Apply Selections**, keeping in mind that it is possible to narrow your criteria too much. When this happens, no students will appear on the work list.

Once the advisor has narrowed a work list, they can save it by entering a name and clicking **Save**.



The work list will display 25 students per page alphabetically by last name. At any time, sort the work list by clicking on a column title. Clicking it a second time will change sort direction.



If at any time the list you are working with is too small, you can show all students in the tool by clicking **Show all students in institution**.

To edit a student work list:

1. Click on the list name.
2. Click **Edit**. The Refine List menu will appear. Select criteria and click **Apply Selections**.
5. Once finished with editing, click **Save** to update the work list.

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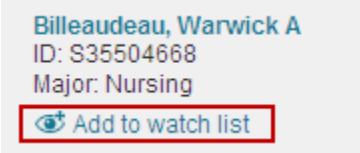
To delete a student work list, simply click the **X** next to any work list in the Saved Work Lists area. A confirmation message will appear; click **Delete** to delete the work list.

Watch List

The Watch List is a specialized type of student work list. Whereas most work lists are created by finding students that match criteria and will dynamically be updated based on that filter criteria, the Watch List is an ad hoc collection of students who do not necessarily have to have matching criteria in common. Students will stay on the watch list until removed by the advisor.

To add a student to your Watch List, simply click the **Add to watch list** link.



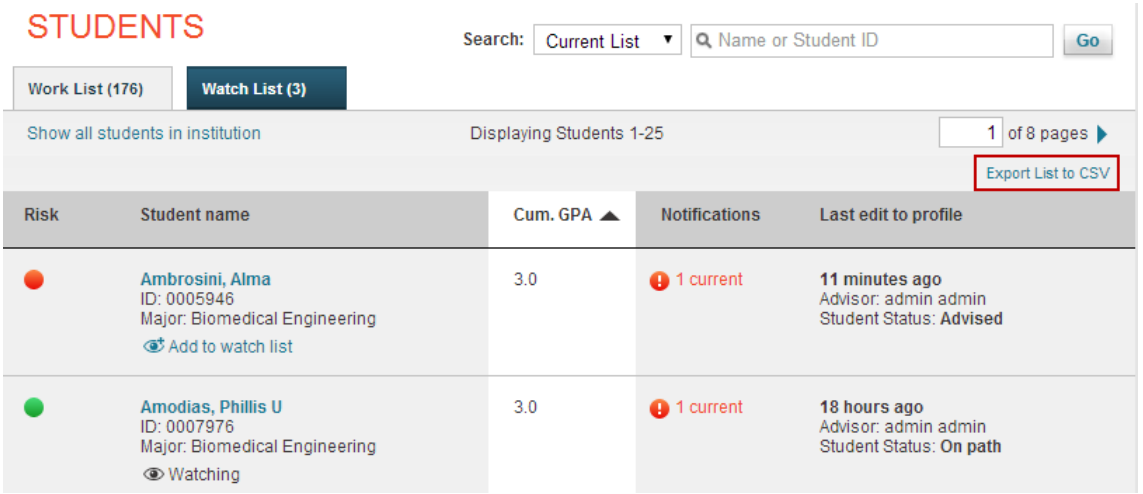
Advisors can add students to their Watch List at any time. To see the list of students on your Watch List, click the Watch List tab on the Students page.

Students on the Watch List can be viewed and worked with in the same manner as any other student on a work list. Advisors can sort the Watch List by any of the columns on the page, though students will be listed by the number of notifications on their profile by default. Students may be removed from the Watch List at any time by clicking **Remove from watch list**.

Exporting Work Lists and Watch Lists

Advisors can export work lists and watch lists for action campaigns. To do this, click **Export List to CSV** on either the work list or watch list page of your choice.

Extensive student information is included, including contact information, making this feature helpful for large-scale outreach campaigns. Up to 500 students may be exported at a time. If there are more than 500 students in your list, the Export List to CSV link will not work.



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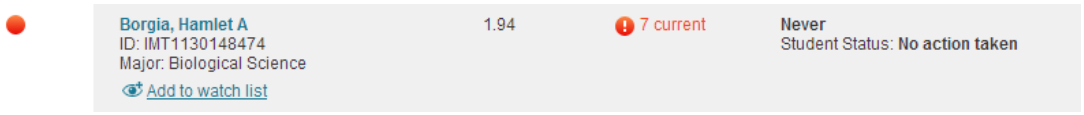
Student Profiles

Overview

Student profiles are at the center of the advising application. However, to understand the importance of what the student profile can do, some background understanding is required, which is covered in this overview.

All student profiles can be opened by clicking a student's name in a work list or search results.



The student profile includes four pages: Overview, Success Progress, Term Details and History.

Understanding Student Profiles

What is the student profile?

The student profile is a set of information about the student and their academic performance at your institution. It has details similar to a limited SIS profile. However, our profile significantly differs in its focus and contains information centered on proactively identifying students at risk of not graduating in their major and providing the tools to remediate the student.

What is its value to my institution?

The value of the student profile is that it allows advisors to see the risk factors that could cause a student not to graduate in their major. Rather than focusing too heavily on individual performance indicators, it looks at the complete set of student performance information and compares it against historical data. It then predicts the student's likelihood to graduate based on their performance. By identifying the most impactful factors, it gives advisors the ability to provide actionable guidance.

Why is the student profile focused around this concept of risk?

Research shows that targeted elements of institutional data can be accurate in predicting future student success. The student profile brings the insights found by mining institutional data forward so they can be actionable to an advisor. Risk is deconstructed into discrete factors so an advisor can highlight a student's performance strengths and weaknesses and relate them to how critical they are to the student's current path.

How does EAB's Student Success Collaborative define "risk?"

EAB's Student Success Collaborative defines success as a student completing their course of study and graduating. Risk embodies the possibility of a student not graduating. Typically, student risk is the possibility of not graduating under current course of speed of the student;

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however, the advising application allows for exploration of risk under alternative paths or scenarios as well.

How does EAB's Student Success Collaborative generate the predictive risk indicator?

The advising application uses advanced analytical methods to identify the most impactful trends in student data and highlight opportunities for more targeted intervention. What this means is the application's predictive analytics have identified indicators of overall student academic health concerning GPA, trends in GPA, and credit accumulation so advisors can get a pulse check on student risk and work to share that information in a way that is easy to understand as well as motivating for the student. Advisors can use the application to evaluate the fit between the student and their current major and suggest majors that are a better match to the student's strengths and weaknesses if necessary.

How are a student's risks measured?

Historical course data shows patterns of grade performance in certain sets of courses. A composite index of grades from each set of clustered courses is formed for every student, who is judged against their peers to measure their level of risk. Optionally, institutions may include transfer coursework as well as pre-enrollment factors including standardized tests and high school GPA.

What are the current limitations of EAB's Student Success Collaborative's predictive analytics?

Graduation is a multifactorial event, all of which is not captured reliably and in readily accessible data stores. At this time, the analytics engine does not take into account risk attributed to financial information or student engagement. Also, predicted risk is measured by observed student performance. Statistical models find patterns of association and rarely find root cause. If a student is performing poorly, root cause will need to be determined by the advisor. Risk models are not a guarantee of future outcomes, but quantify the certainty of future events; i.e. the likelihood of a student to graduate based on historical data and their current performance. Finally, patterns in historical data may be have less predictive power for current students if the profiles of student risk have, over time, changed dramatically. Advisors should use their best judgment, combined with the tools and insights available in the advising application to integrate risk level into a holistic assessment of the student.

What are the success markers?

Success markers are another way the application attempts to warn advisors that students are at risk before a crisis occurs. Basically, the success markers manually identify key points in the course of study that tend to indicate a student will succeed or not in the major.

How are success markers different from risk?

Success markers are created manually in collaboration between the institution and EAB's Student Success Collaborative consultants using a variety of factors which can include historic data as analyzed by the predictive model. Additionally, success markers are more focused on past performance, while risk is more focused on predicting future problems.

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What is the purpose of statuses?

Statuses are created in collaboration between the institution and consultants based on the institutional need. While these were originally tied to a notion of risk, many institutions use the status to mark different stages in intervention workflow. Speak to your institutional administrator or EAB's Student Success Collaborative consultant for more details.

How are midterm grades used in the application?

If your institution uses midterm grades, they will be shown on both Success Progress and Term Details as they are received. Midterm grades will be replaced by final grades once they are received. Because they may not be available for all students, or appear on different dates depending on when faculty submit them, EAB's Student Success Collaborative will display a banner on the Student Overview page to let you know that at least one midterm grade is available for the student.

Student Status & Risk Indicator

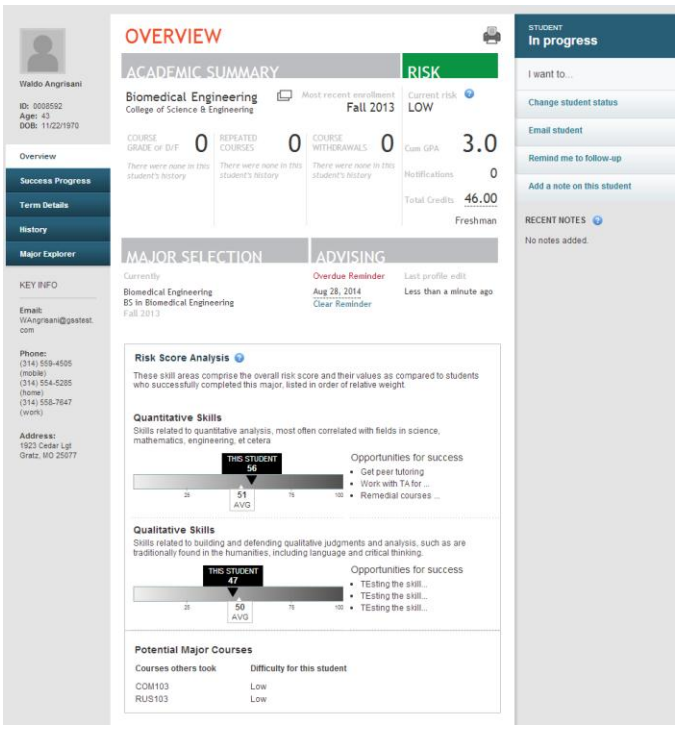
Two further concepts necessary to working with the student profile successfully are student status and risk level. The advising application uses the Risk Indicator and Student Status to help advisors identify students potentially at-risk. However, the two do this differently.

Risk Level uses the predictive analytics model to compare a student's performance against historic student data for the major and generate a likelihood of completion based on current student performance.

Student Status is a manual status of the student as assigned by the advisor. Each institution can customize statuses in different ways. These statuses can indicate advisor-assessed risk or what actions have been taken on the student profile.

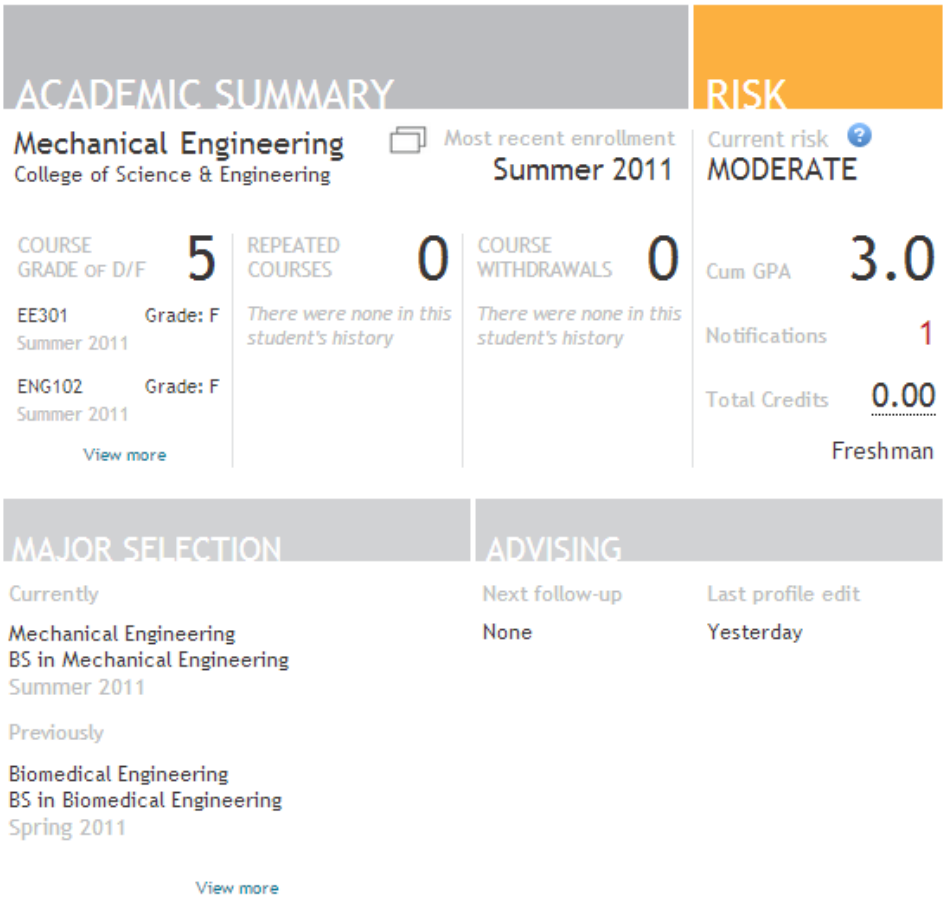
Student Overview Page

Overview gives an overview of the student's performance, including the factors that determine the student's risk level.



The Academic Summary shows the student's major and division, number of Ds and Fs the student has received, number of repeated courses and withdrawals, the risk indicator for the student for his or her major, most recent term of enrollment, and a link to the degree map if available.

Underneath this information, advisors see the student's major, GPA, total credits, number of notifications, and if the student has received any intervention. By rolling over underlined information, advisors will get more detailed information. Clicking on the notifications number will take the advisor to the Success Progress page, where they will see details about the notifications.



Tip! The Most Recent Enrollment area will show the term the student was most recently enrolled, including the current term. If your institution is currently between terms, it will show the most recent previous term the student was enrolled in.

The Risk Score Analysis shows the risk areas and how the student compares to students who successfully completed the major. Looking at risk area performance will also indicate why the student is or is not at high risk of not completing the major. For example, if an area shows red, it is usually because the student's performance has a high importance to major completion and the student's comparative performance is below average compared to the historical norm. In addition, the risk score analysis will make suggestions about what the student can do to improve chances of succeeding in each risk area.

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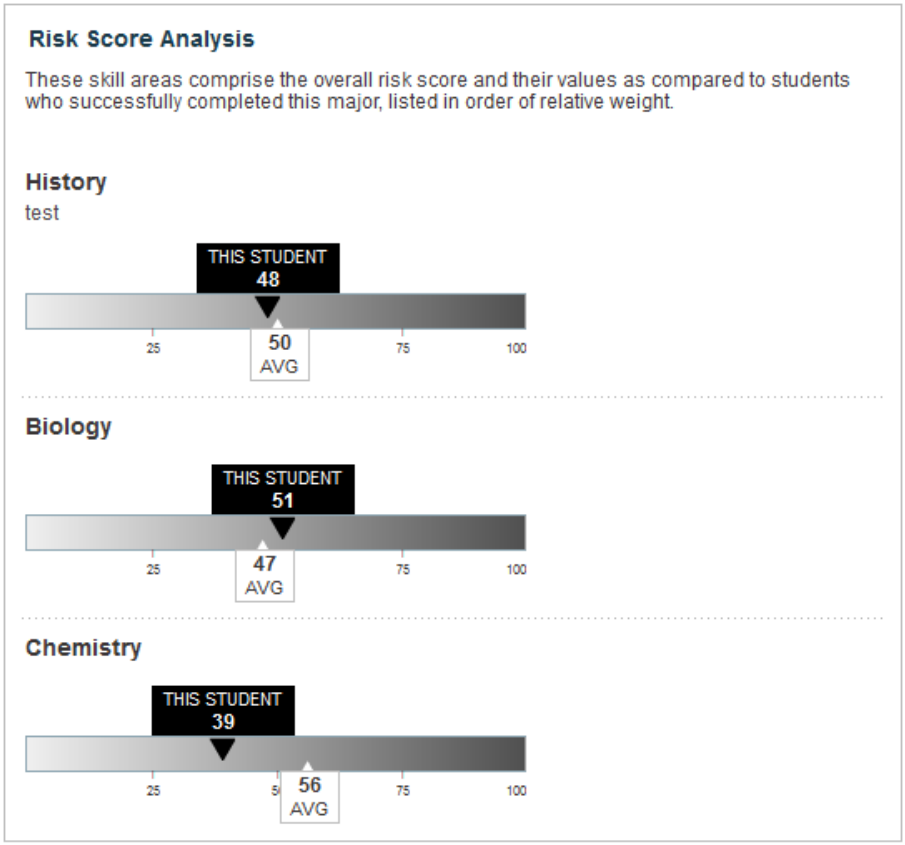

Success Progress

Success Progress shows the student's academic summary as well as success markers and the student's performance against the success markers. It also shows GPA and credit accumulation charts. During the registration period, Success Progress also makes recommendations about courses students should take to make progress against their success markers.

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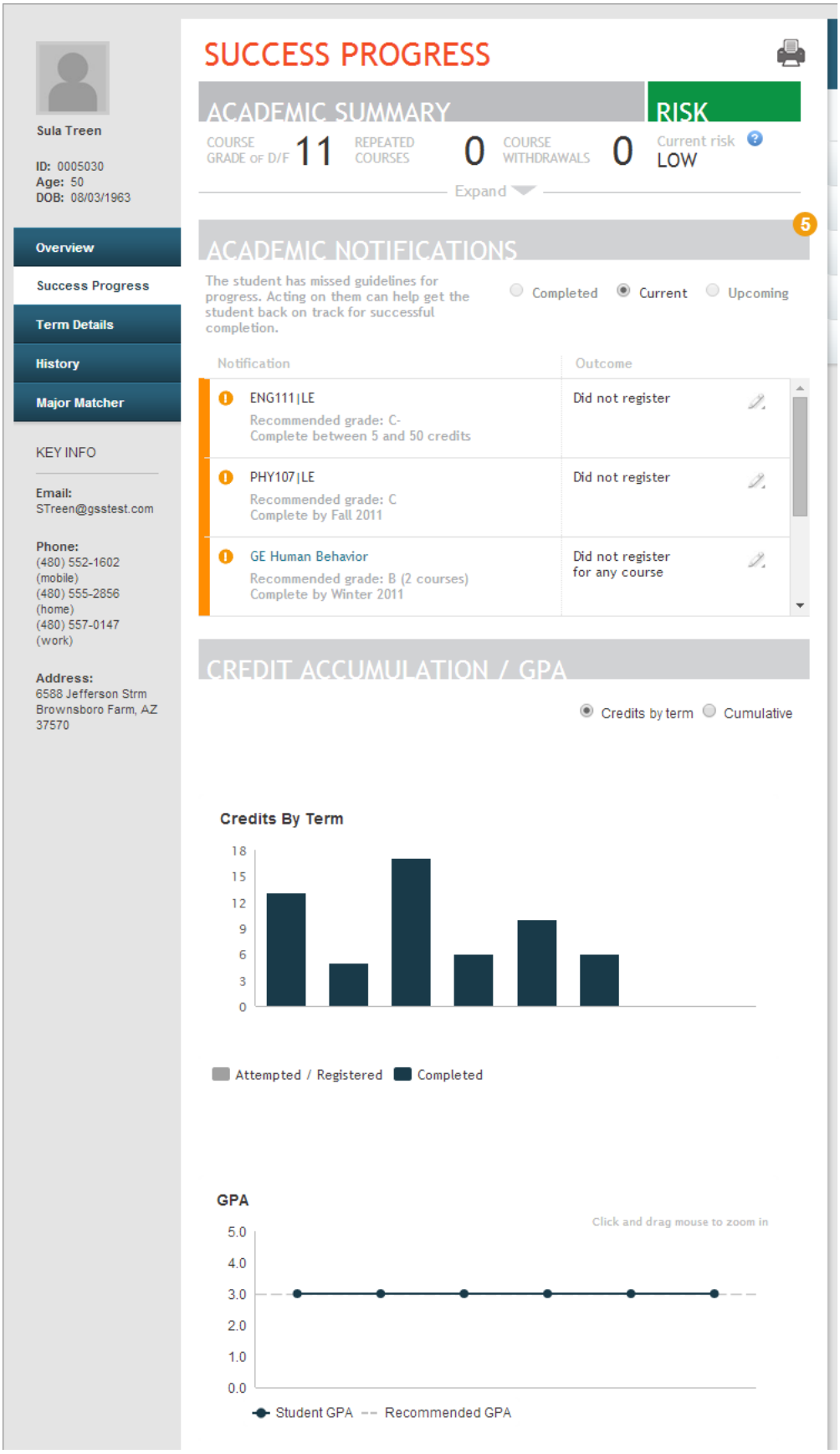
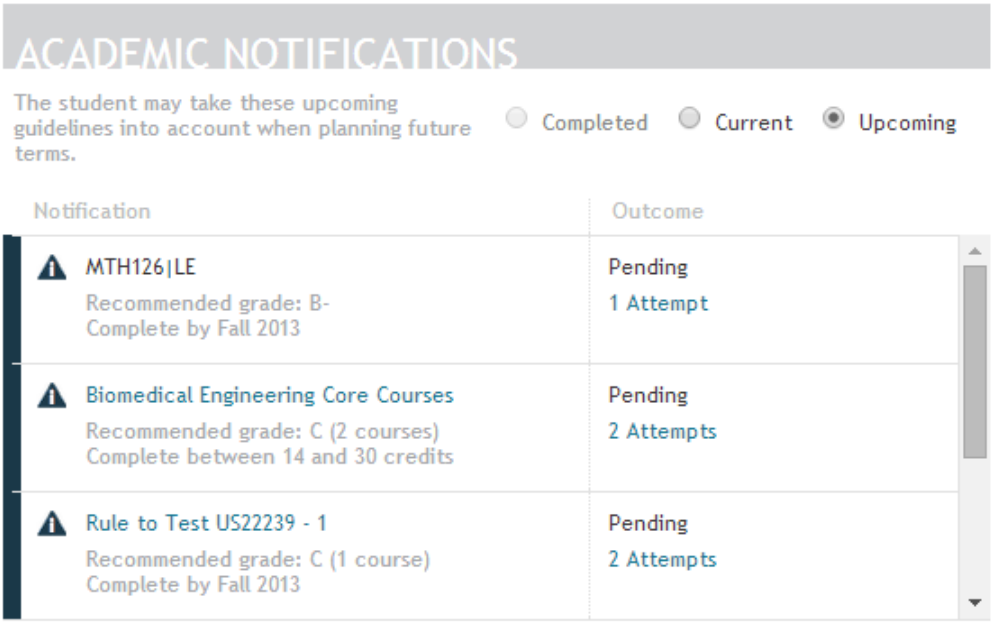
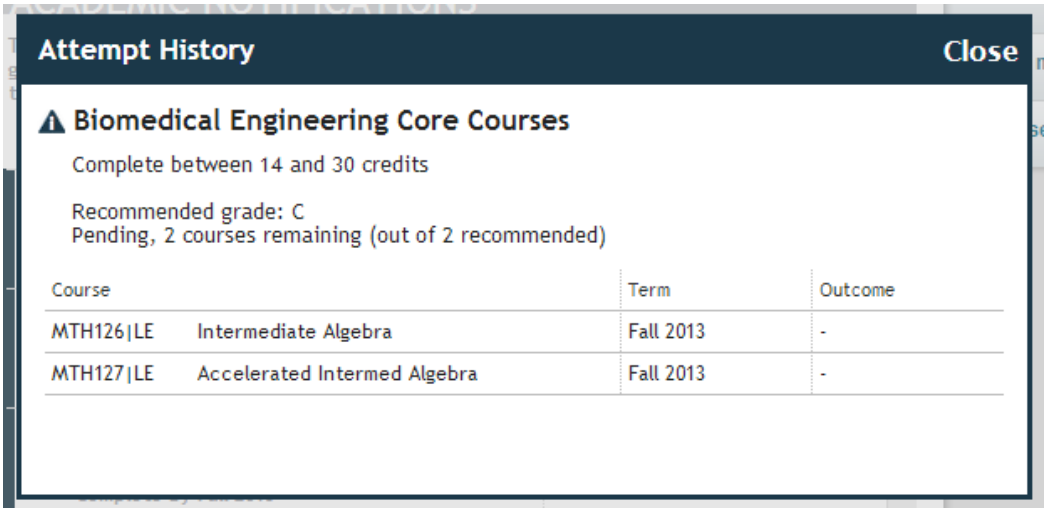

Sula Treen
ID: 0005030
Age: 50
DOB: 08/03/1963
Overview
Success Progress
Term Details
History
Major Matcher
KEY INFO
Email:
STreen@gsstest.com
Phone:
(480) 552-1602
(mobile)
(480) 555-2856
(home)
(480) 557-0147
(work)
Address:
6588 Jefferson Strm
Brownsboro Farm, AZ
37570
SUCCESS PROGRESS
ACADEMIC SUMMARY
RISK
COURSE GRADE OF D/F 11
REPEATED COURSES 0
COURSE WITHDRAWALS 0
Current risk
LOW
Expand
ACADEMIC NOTIFICATIONS
5
The student has missed guidelines for progress. Acting on them can help get the student back on track for successful completion.
Completed
Current
Upcoming
Notification
Outcome
ENG111|LE
Recommended grade: C-
Complete between 5 and 50 credits
Did not register
PHY107|LE
Recommended grade: C
Complete by Fall 2011
Did not register
GE Human Behavior
Recommended grade: B (2 courses)
Complete by Winter 2011
Did not register for any course
CREDIT ACCUMULATION / GPA
Credits by term
Cumulative
Credits By Term
18
15
12
9
6
3
0
Attempted / Registered
Completed
GPA
Click and drag mouse to zoom in
5.0
4.0
3.0
2.0
1.0
0.0
Student GPA
Recommended GPA

Advisors can learn more about success marker details by clicking any requirement that is blue. They can also look at completed, current, or upcoming notifications by selecting the appropriate button.





Advisors can disable notifications on the Success Progress page. See “Disabling Notifications” for more information.

In addition to traditional success markers, the Success Progress page also includes a Recommendations section that informs advisors of upcoming classes the student should register for to continue making progress against those success markers. This section will only appear during relevant times in the term.

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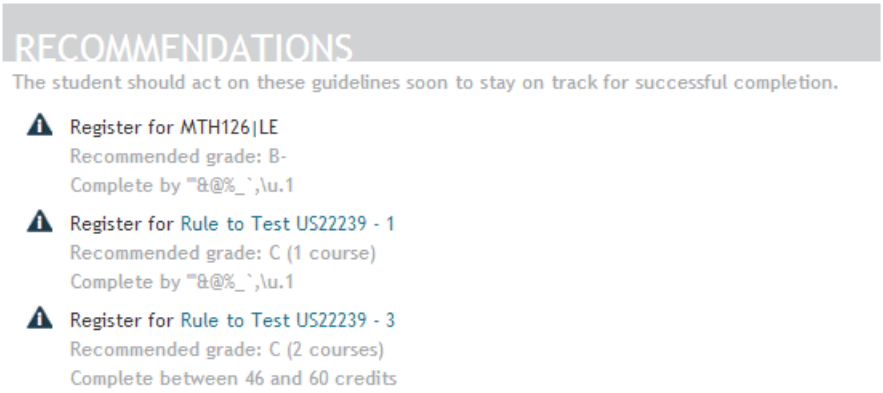

The Student Progress section also shows the student's GPA trend and credit accumulation, two factors used by the predictive model to determine student risk level. Advisors can view GPA term by term, at the institution, or overall (e.g. the combination of institutional and transfer GPA) by selecting a radio button. If your institution does not provide term and institution GPA, you will only see cumulative GPA. Likewise, advisors can view credit accumulation by term or cumulative credits accumulated, further broken out by credits attempted and credits completed when applicable. When an advisor hovers over an individual data point, more detailed information will display. Advisors can zoom in on the GPA chart to see more detailed fluctuations in GPA trend.

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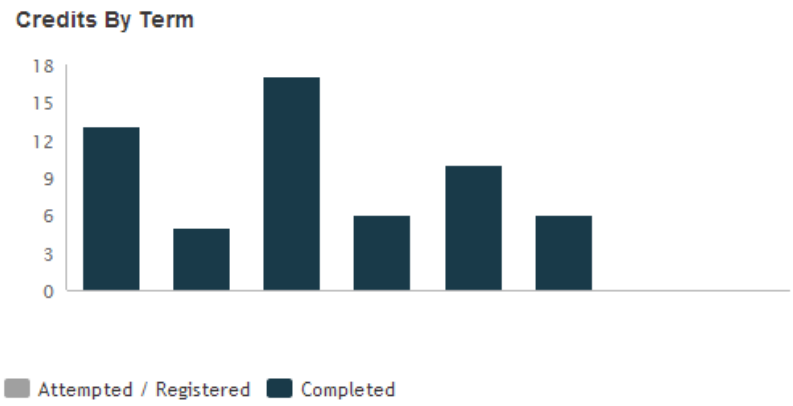
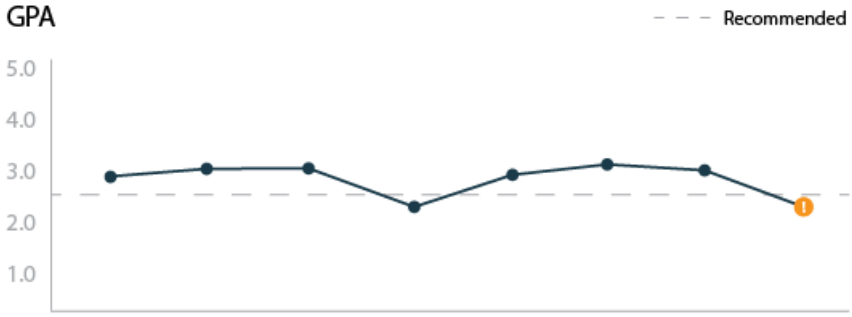
CREDIT ACCUMULATION / GPA

Credits by term Cumulative





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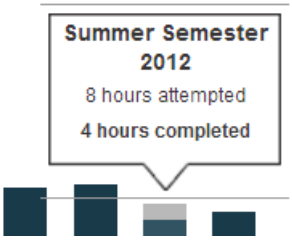

Success Marker Notification Status

There are five default types of success marker notification statuses. Your institution may customize these instead.

Needs Attention: Success marker is not met. For example, ENG101 not completed within the designated range of credits or term GPA is lower than recommended.

Completed: Used for two types of success marker completion. First, completion of course success markers on the first attempt. Second, completion of course-based markers that have been met through a subsequent attempt (with that attempt history visible in Success Progress) .

Example: First type - ENG101 grade threshold met by the appropriate semester or cumulative GPA higher than success marker within the credit range where cumulative GPA marker exists (e.g. 3.0 GPA between 15-30 credits). Second type – ENG101 failed in 0-15 credit range but repeated and passed in credit range 15-30.

Pending: This status is used for all future success markers, including both those with registrations and those simply existing in the future. Pending is also used when a student retakes a course after missing a success marker for it.

Example: ENG101 taken during current term but grades not yet available, or the course is part of a two-course group with ENG102 which has not yet been taken within the credit range listed. As this class has not been taken and the credit range the student can take it within is still valid, the status is Pending.

Disabled: This status is for any success marker that has been manually disabled by an advisor.

Example: Student's transfer credit for a success marker course has not yet been added to the SIS. The advisor disables the success marker to prevent the student from appearing on their Needs Attention list. The status of the success marker is Disabled.

Tip! Only one GPA marker is active at a time in the Student Success Collaborative system. If a student previously did not meet a GPA success marker, this marker will clear in the future. However, if the student still does not meet a recommended GPA, new GPA success markers will be marked Needs Attention.

Disabling Notifications

Advisors can disable notifications on a student profile. Once disabled, this notification will not be listed in a way that brings the notification to the attention to **any** advisor using the tool. Disabled notifications may be re-enabled at any time.

Disabling notifications allows advisors to override notifications quickly and reduce the amount of "noise" generated by notifications.

To disable a notification:

1. Open a student profile.

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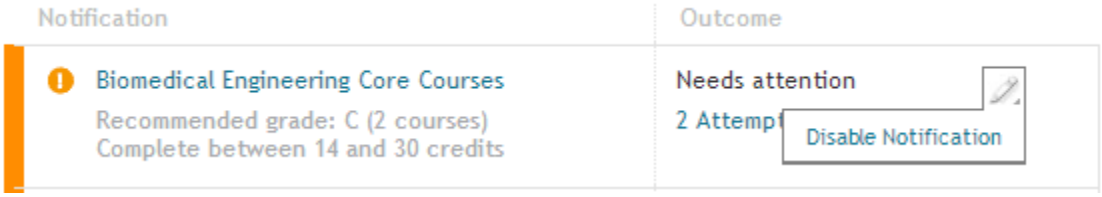
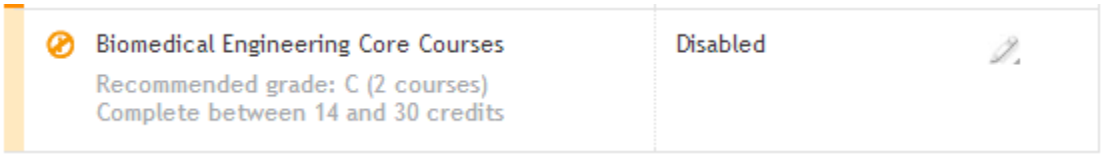
2. Open the Success Progress page.
3. Find the notification that you wish to disable.
4. Click or roll over the edit icon next to the notification.



5. Select **Disable Notification**. The notification will now be disabled and display this way in the student profile.



To enable a notification, advisors will need to open the Success Progress page, find the notification that needs to be enabled, and select “Enable Notification” once they roll over the edit icon next to the notification.

Term Details

Term Details provides a term-by-term view of the student’s academic record, together with important metrics like term GPA and completion ratio. Unlike the History page, which shows course registration and other course events as they happen, Term Details shows only courses that part of the student’s academic record. If a student registers for a course but withdraws prior to the close of registration, it will not be shown in Term Details.

Pre-enrollment data, if provided by the institution, will appear in the student’s first term. The amount and type of pre-enrollment data may vary depending on what is available for a particular student, but will generally include standardized test scores, high school name, and high school GPA.

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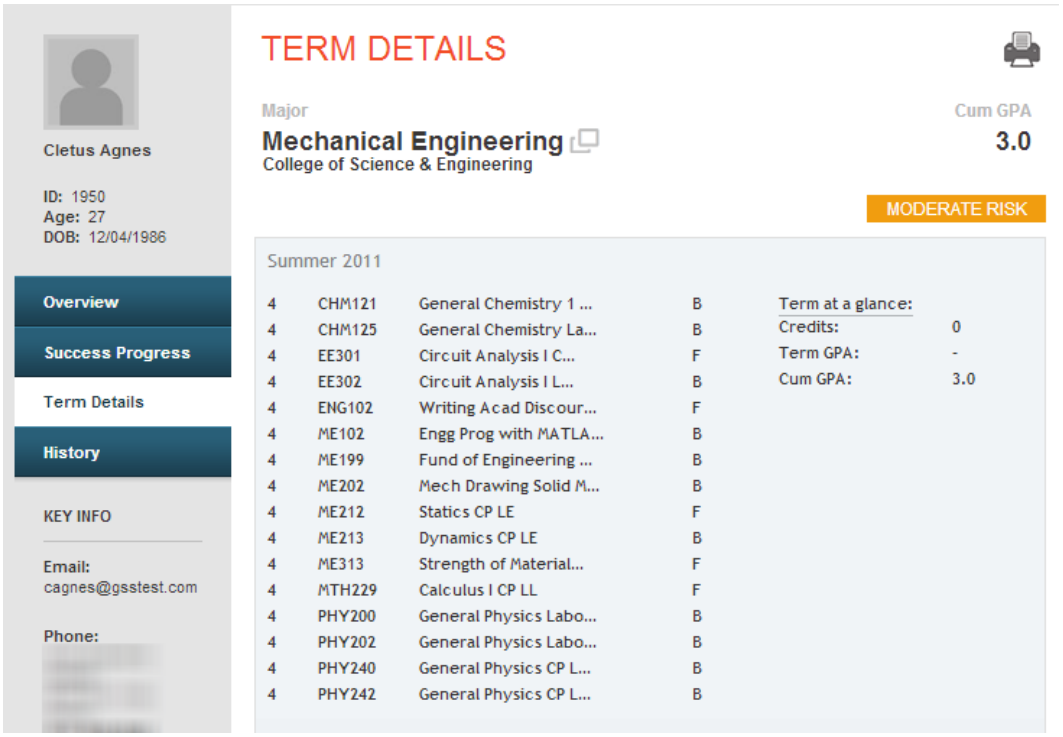
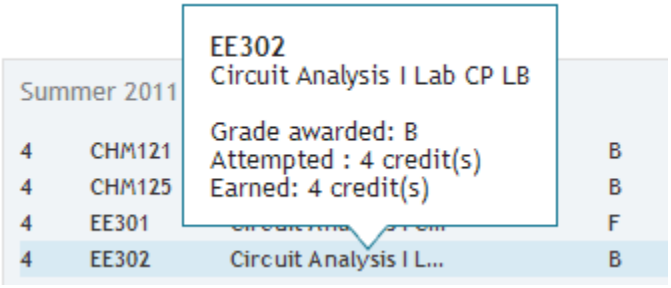


Term Details shows “Term at a Glance” highlights for each term. These include the cumulative GPA, credits, and credit completion ratio (the percentage of attempted credits that the student completed). Institutions that provide a term GPA will also see it in the Term Details.

Advisors can get more details about a course by rolling over the course title.



In addition, if your institution sends Term GPA, advisors can look at term trends by clicking the **View More** button in the “Term at a Glance” highlights.

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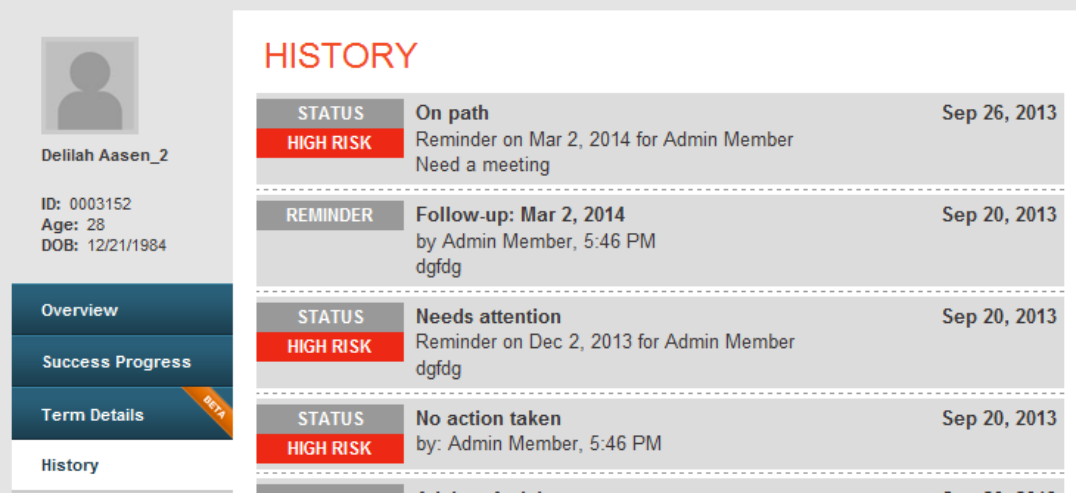
History

History shows activity that has occurred on the student's profile, including student course history, status changes, notes added, if the email link was clicked, major changes, and reminders. In addition, changes in risk level will also appear.



In addition to providing information about the student's progress, advisors can perform actions in the student profile using the actions on the right side of the page.

Predictive Modeling and Major Explorer

Major Explorer uses the advising application's predictive analytics model to guide student and advisor decisions about major decisions. Because many advisors and students will be curious about how Major Explorer does this, we have included a brief explanation of how predictive modeling works in this case.

The Student Success Collaborative data platform predicts individual students' likelihood to graduate in a wide range of majors on each campus. Data on historical student cohorts is collected from your information systems and used to generate an initial series of candidate academic metrics. Advanced multivariate statistical and machine learning techniques perform variable selection and conduct hypothesis testing to highlight the most impactful trends in student data. Results are cross-validated for accuracy and compared with known research on student success outcomes. This process may be referred to as "model training" by your consultant.

Major Explorer uses a predictive algorithm to generate information about whether a course of study is a good fit for the student, attempting to find the majors where the student has the highest chance of graduating. To do this, the algorithm analyzes basic data from the student information system. Items like GPA and credit accumulation start to determine the degree to which a student is at risk. Additionally, student coursework is analyzed to determine the level of skill a student has demonstrated in a content domain such as the humanities, STEM courses such as biology and mathematics, business and economics, et cetera. The student's skills are matched to their current major. Risk is mitigated when their skill strengths create a high match with the skills needed to excel in the major. Finally, Major Explorer generates a red/yellow/green risk level that estimates how likely the student is to complete the major. Red suggests that without intervention, the student will have the most challenge in completing the major. Yellow suggests the student is statistically more likely to complete these majors, but there is more challenge for the student than a major with a green indicator. Green indicates majors the student will have the least challenge completing overall.

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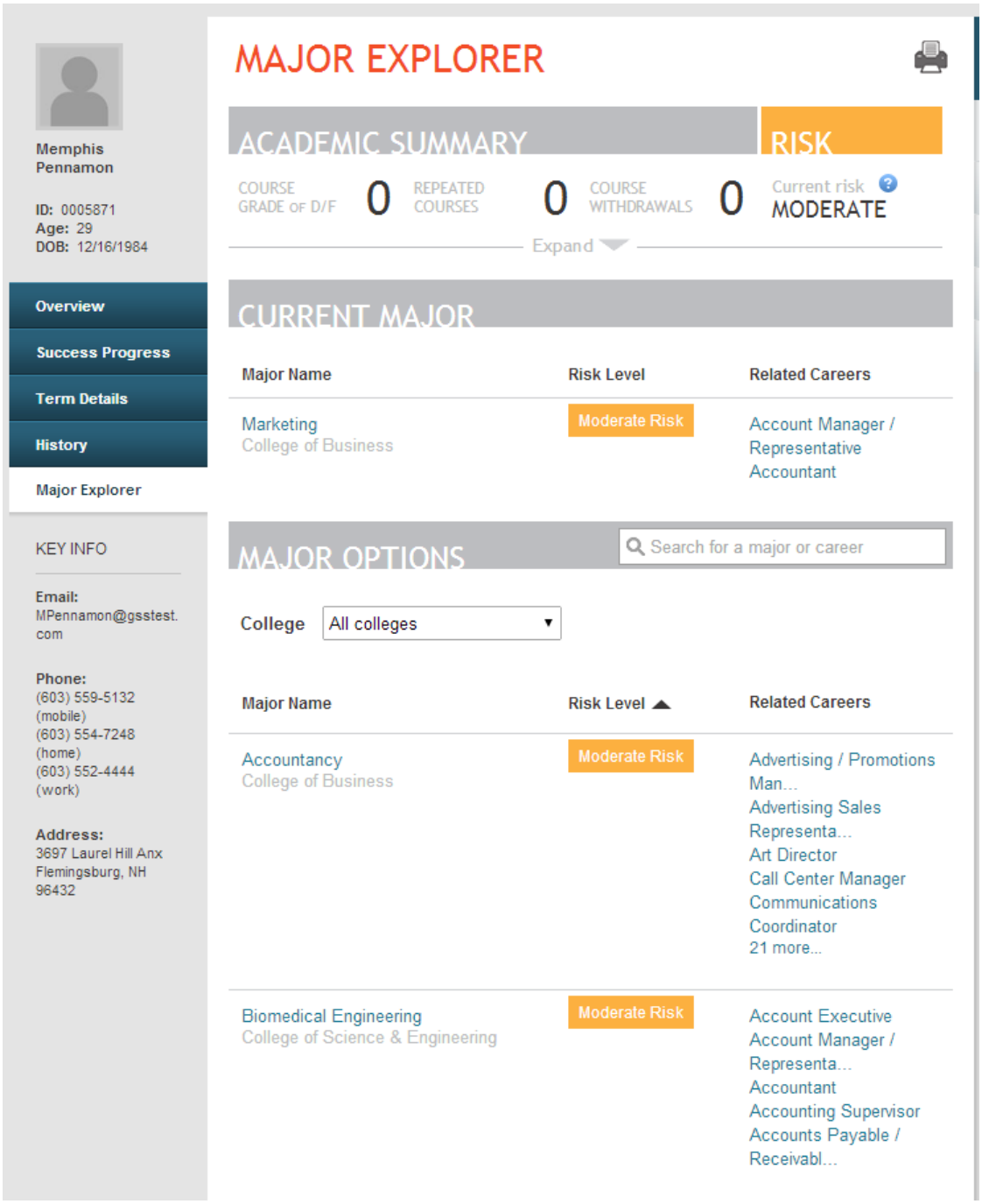
Using Major Explorer

To open Major Explorer, open a student profile and click **Major Explorer.**



Recommended majors are shown in order beginning with the best match according to risk. Students who are at moderate or high risk in one major may not have a low-risk match because the factors determining their risk (GPA, credit accumulation, etc.) are applicable to all majors. Major Explorer provides other options to guide a student toward a major, including filtering by majors available in a college or searching directly for a major or career.

Clicking on a major name will take the advisor to a page that describes the major and shows careers related to the major. Additionally, advisors may search for majors not shown on the page for the student to investigate. The student's current major will be listed first for

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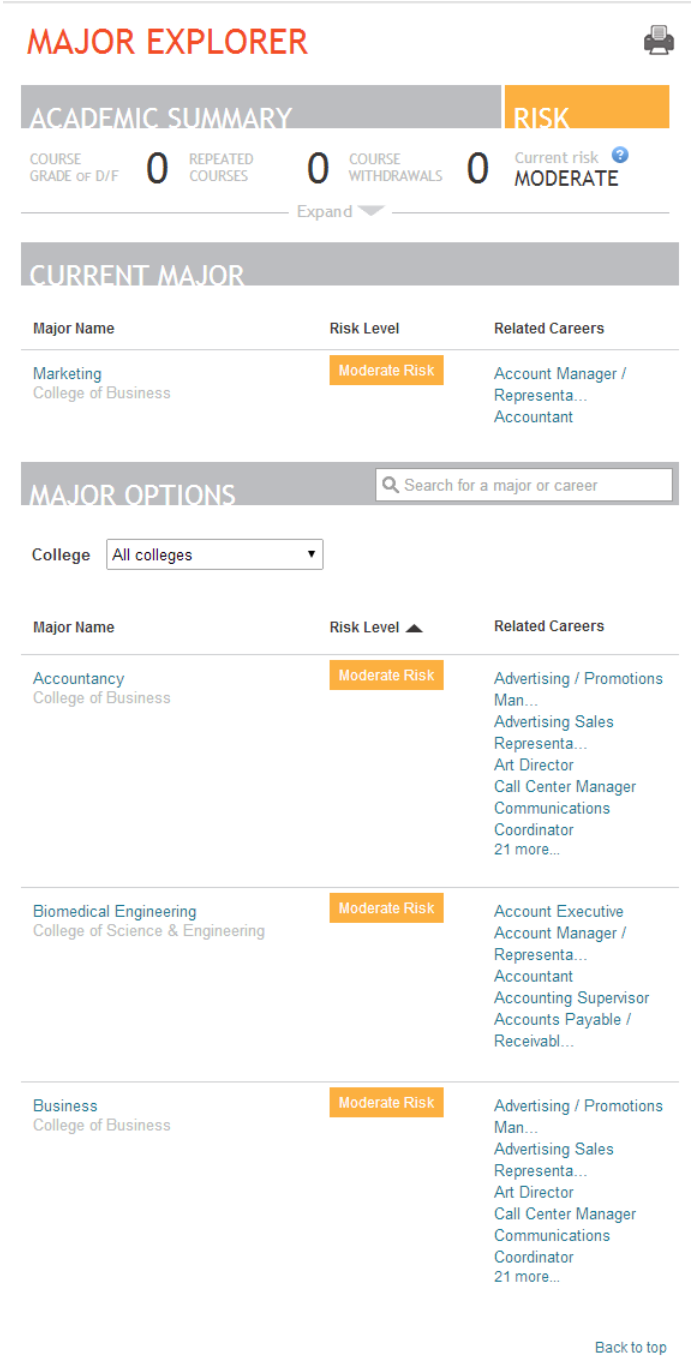
comparative reasons. Major Explorer displays the risk color associated with the student's likelihood to graduate in the major for each major on the page.



The career information is provided by Burning Glass, a leading career information provider and Student Success Collaborative partner. Advisors can also use the search box to search for related careers as well as majors to compare. Clicking on a related career will share more information about the career and national hiring statistics.

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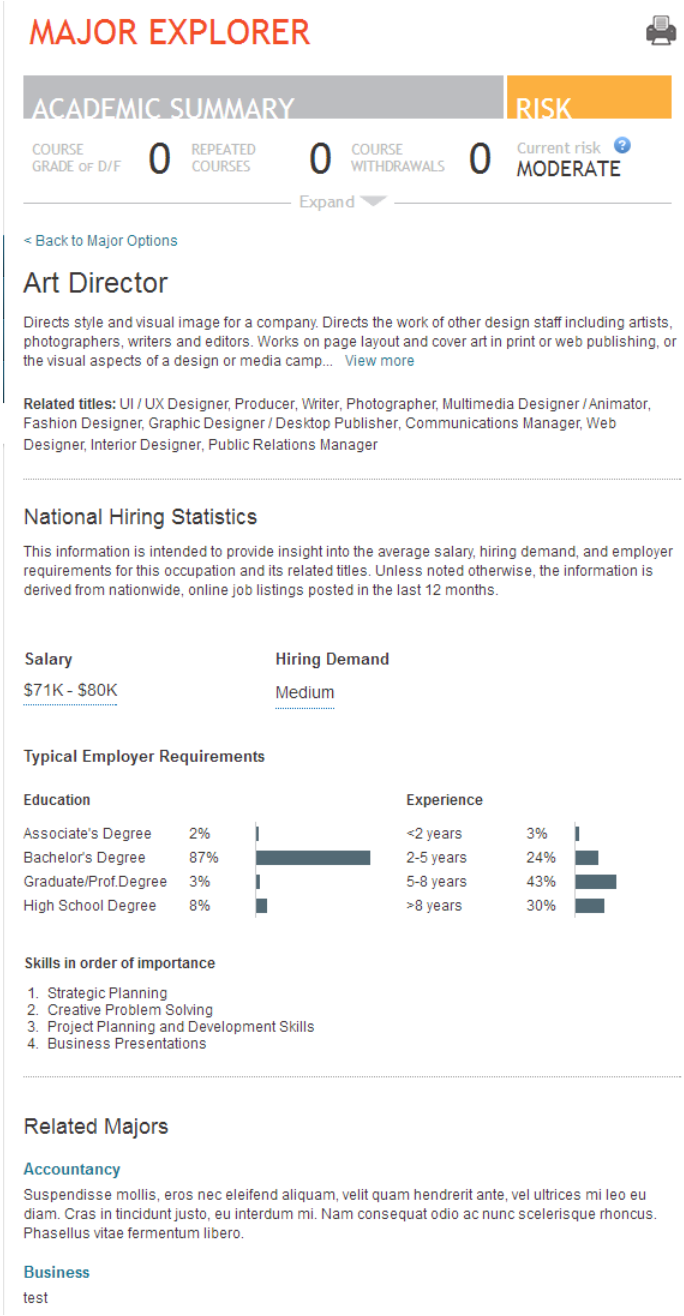
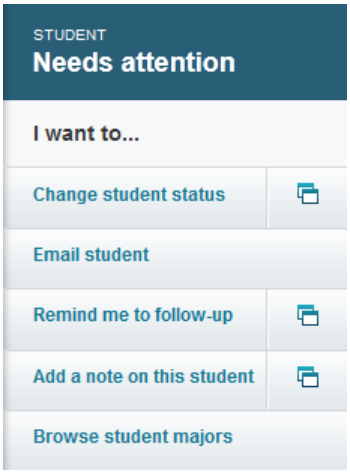


Working with a Student Profile



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Once the advisor has opened a profile, they should review and verify the data the profile provides. In most cases, that means viewing the student risk indicator and status.

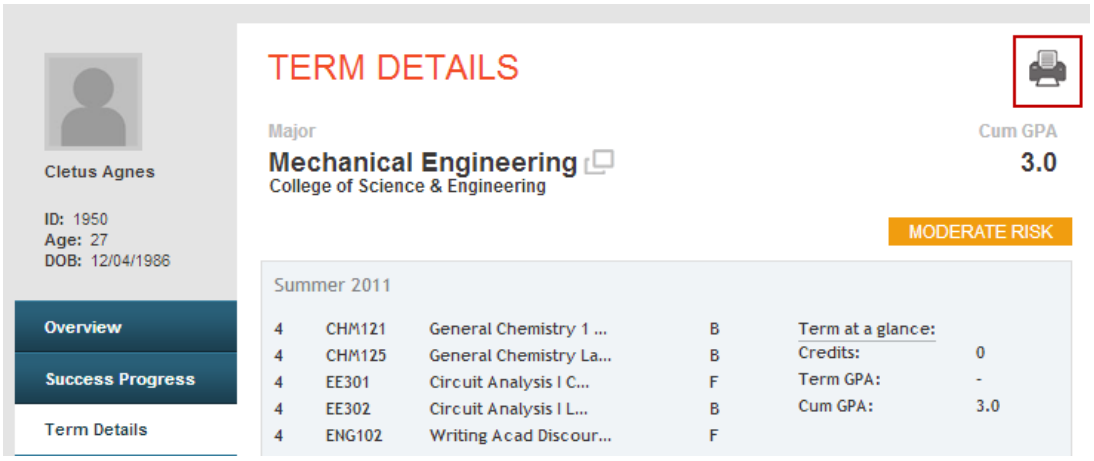
Advisors should then look at the academic summary on the main/overview page. It shows basic academic information like the student's division, risk level, enrollment status, credits attempted, credits earned, major, cumulative GPA, last profile edit, et cetera.

To examine notifications on a student's profile, advisors should go to the Success Progress page. This page will contain all of the success markers a student should meet for his or her major. Advisors can see these markers by selecting Completed, Current, or Upcoming while in the Academic Notifications section.

The requirements are determined by the major's success markers. Advisors may want to verify the information in the Success Progress section against known departmental requirements as well as the student information system to make sure the notification is accurate.

Printing Student Profiles

Each of the four student detail pages now displays a Print button, which will allow advisors to print the full content of each page, labeled with the student's name and student ID, for their records. Pages may be printed in color or in grayscale. Very long page elements such as Risk Score Analysis, may cause the printing to "break" over multiple pages.



The print capability will be expanded in a later release to include the option for the advisor to include or exclude information to share with the student.

Tip! Print using the print icon on the page only. Using the browser's print function may give unsatisfactory results.

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Taking Action on the Student Profile

Overview

The advising application is built to make recording interventions with students simple, so that it's easy to create paper trail that can be shared with other advisors. This section explains how and why advisors will take action on a student profile.

Four actions can be performed on a student profile. These actions are:

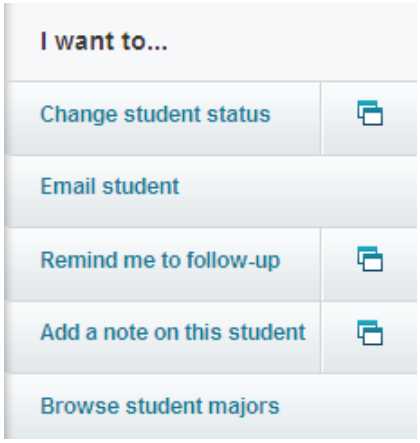
Change student status: Advisors can change the status of a student.

Email student: Advisors can send a student an email from their own external email account.

Add a reminder to follow up: Advisors can set a reminder on the student profile. This reminder will create a new reminder alert for the advisor and can be used to follow up with a student.

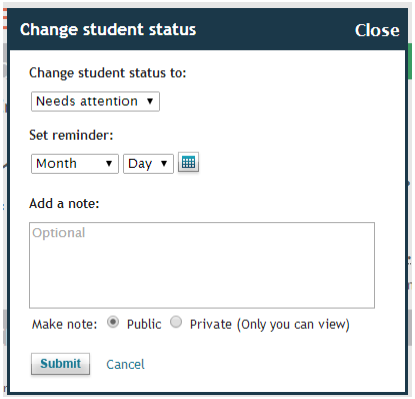
Add a note to the student profile: Advisors can place a note about the student in the profile. This note will appear in the History section of the profile.

Changing Student Status



To change student status:

1. Open a student profile.
2. Click **Change student status**.
3. Select the appropriate status from the list. Set a reminder date and add a note.
4. Click **Submit** to change the student status.



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Email a Student

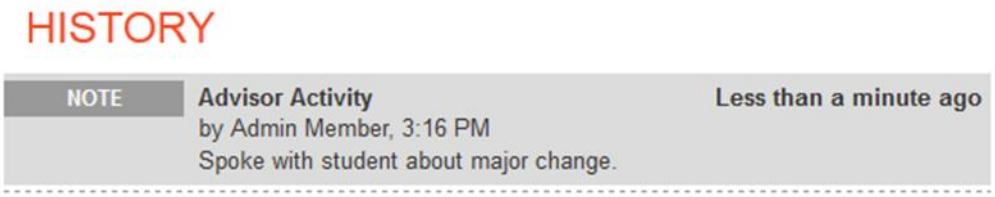
To notify a student of an upcoming meeting or communicate a success marker notification to them, advisors will use your external email system such as Outlook. However, by selecting the action within the advising application, there will be a record of the action in the student history.

To email a student:

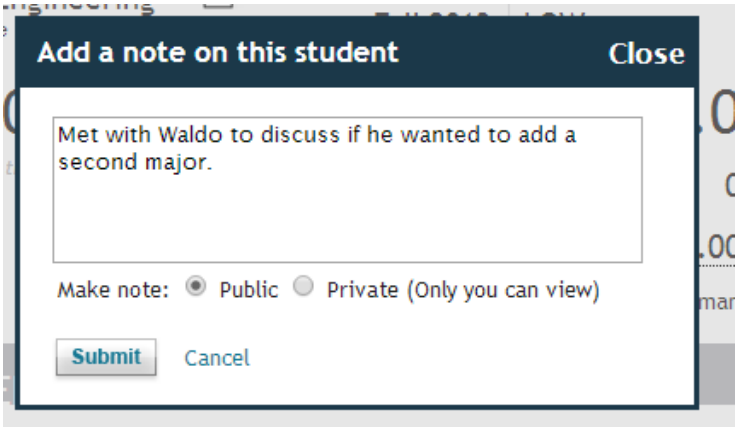
1. Open a student profile.
2. Click **Email Student**.
3. Compose and send the message using the linked external email client.

Add a Note to Student Profile

At any time, you are able to add a note about a student to the profile, e.g. after a meeting or if the notification is incorrect or incomplete. Notes can also be added when you take any action on the student. These notes will appear in the History section of the student profile as well as the Recent Notes section of the main student profile page. Notes may also be edited or removed. Removing a note means that a note will no longer be visible to Student Success Collaborative users but will still exist in the database.



Notes can be public or private. Public notes can be seen by all users of Student Success Collaborative. Private notes can only be seen by the advisor who created the note.



Notes can also be printed by opening the menu on each note on the student and selecting **Print Note** as shown in the screenshot below.

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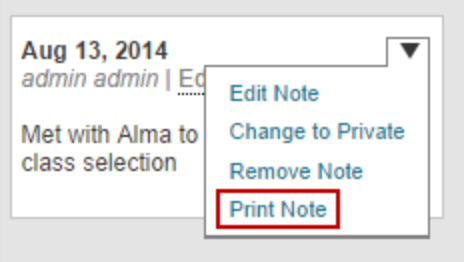


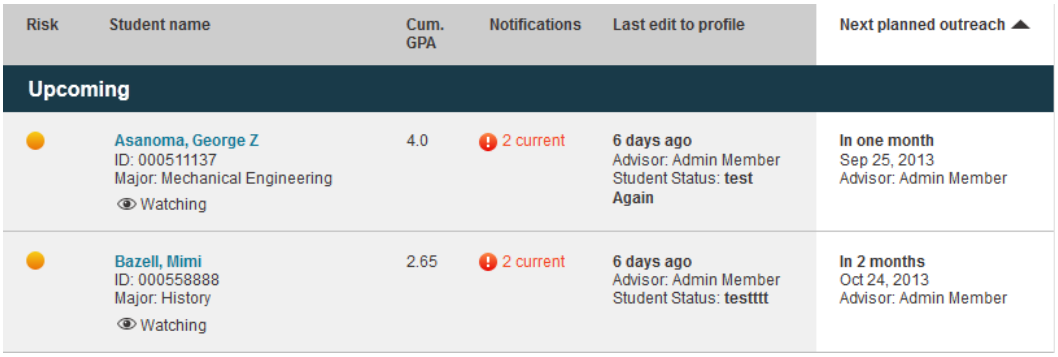
To add a note:

1. Open a student profile.
2. Click **Add a note on this student**.
3. Enter the note in the text box.
4. Choose whether the note will be public or private.

Click **Submit** to add the note to the student profile.

Set a Reminder

Once users have taken an initial action, like setting up a meeting with a student, the advisor may have no further work to perform at the present time. However, advisors will want to revisit the student's file. In this case, the advising application provides users with the ability to set a reminder on a student profile. This reminder will appear in the student list.



Tip! If no action is taken on a profile before the reminder date, a red circle will appear on the advisor's reminder tab to indicate that a follow-up is past due.

To set a reminder on a student:

1. Open a student profile.
2. Click **Remind me to follow-up**.
3. Select a date.
4. Enter a note about why you are setting the reminder. This is required if the student is being set to In Progress status and optional if the student is set to Advised status.
5. Click **Submit** to set the reminder.

Once you have set a reminder notification on a student profile, that student will be saved in a reminder work list. The reminder list is organized by date: overdue students will show first,

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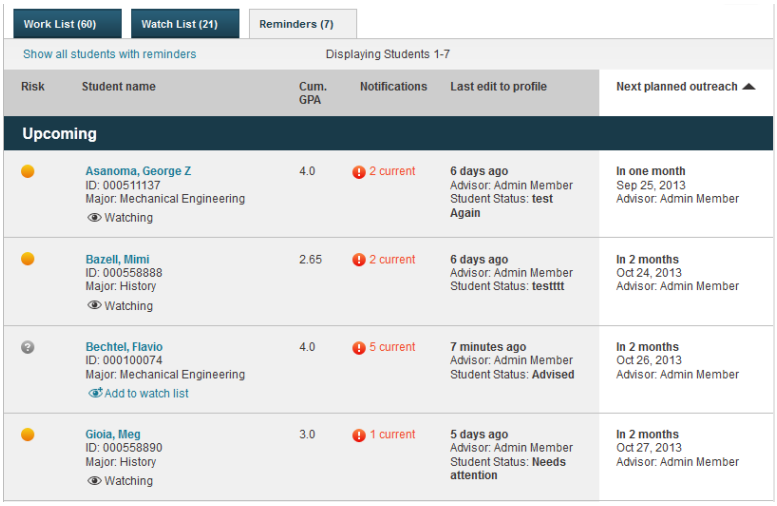
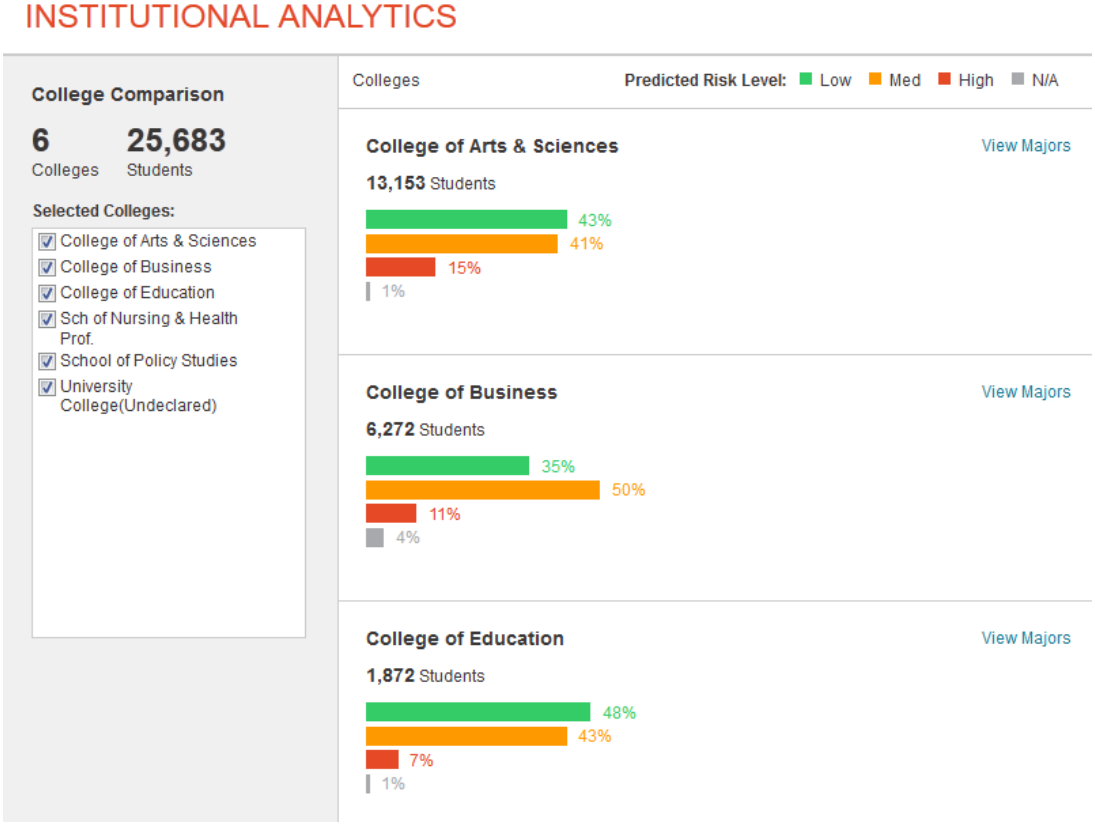
followed by students with upcoming reminders. Students on the reminder list may be sorted by clicking on the column headers.



Institutional Analytics

Institutional Analytics

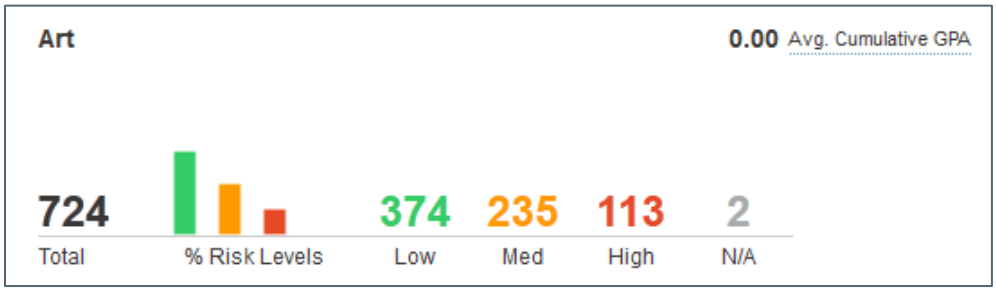
Advisors and administrators with access can get an aggregate view of predicted student performance by opening the **Institutional Analytics** tab. If you do not see this tab, it means your organization has not granted you access.



Institutional Analytics shows advisors and administrators a snap-shot of student risk within a division as well as within a major, using the same analytics used to predict individual student risk. Here, the application shows this information in aggregate rather than at an individual level.

Institutional Analytics allows administrators to drill into each college and program to gain visibility into pockets of risk. This added perspective allows administrators to make more informed and focused decisions when creating new student success programs. Administrators can gain confidence that they are deploying resources where they might have the biggest impact.

Check or uncheck boxes on the left to remove a division's analytics from view. Drill further into analytics about individual majors within a division by clicking **View Majors**. They will then be able to compare performance in those majors.



Administrators can see the percentage of students in each risk level by rolling over the color-coded bar in the graph. The user can see not only the proportion of different levels of risk, but also the total number of students. This allows for the user to spot not only where the most severe problems occur, but also where the most students are impacted.

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